



Website: Ocalamariontpo.org

Unified Planning Work Program

Fiscal Years 2024/2025 and 2025/2026
(July 1, 2024 to June 30, 2026)

Mission

To plan for a future transportation system that is safe and accessible for the residents and visitors of our community.

Vision

A transportation system that supports growth, mobility, and safety through leadership and planning.

Board Adoption April 23, 2024

Amendment #1: August 27, 2024

Amendment #2: January 28, 2025

Modification #1: March 10, 2025

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Ocala Marion Transportation Planning Organization (TPO)

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2710 East Silver Springs Boulevard, Ocala, FL 34470
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The Ocala Marion Transportation Planning Organization (TPO) is committed to ensuring that no person is excluded from the transportation planning process and welcomes input from all interested parties, regardless of background, income level or cultural identity. The TPO does not tolerate discrimination in any of its programs, services, activities or employment practices. Pursuant to Title VI of the Civil Rights Act of 1964, as amended, Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990 (ADA), the Age Discrimination Act of 1975, Executive Order 13898 (Environmental Justice) and 13166 (Limited English Proficiency), and other federal and state authorities. The TPO will not exclude from participation in, deny the benefits of, or subject to discrimination, anyone on the grounds of race, color, national origin, sex, age, disability, religion, income or family status. The TPO welcomes and actively seeks input from the public, to help guide decisions and establish a vision that encompasses all area communities and ensure that no one person(s) or segment(s) of the population bears a disproportionate share of adverse impacts. Persons wishing to express their may do so by contacting the TPO.

Resolution
No. 25-1

RESOLUTION OF THE OCALA/MARION COUNTY TRANSPORTATION PLANNING ORGANIZATION (TPO) ENDORSING THE AMENDED UNIFIED PLANNING WORK PROGRAM FOR FISCAL YEARS 2024/25 to 2025/26.

WHEREAS, the Ocala/Marion County Transportation Planning Organization, designated by the Governor of the State of Florida as the Metropolitan Planning Organization (MPO) and body responsible for the urban transportation planning process for the Ocala/Marion County area; and

WHEREAS, Title 23 CFR Section 450.308(c) and Florida Statute 339.175(9) require each MPO to develop a Unified Planning Work Program; and

WHEREAS, a Unified Planning Work Program is defined as one to two-year transportation planning work program which identifies the planning budget and the planning activities to be undertaken by the TPO; and

WHEREAS, the Ocala/Marion County Transportation Planning Organization's 2024/25 to 2025/26 two-year Unified Planning Work Program has been prepared to be consistent with Chapter 3 of the Florida Department of Transportation MPO Program Management Handbook.

WHEREAS, the 2024/25 to 2025/26 Unified Planning Work Program was approved by the Ocala/Marion County Transportation Planning Organization on April 23, 2024; and

WHEREAS, the Ocala/Marion County Transportation Planning Organization's 2024/25 to 2025/26 Unified Planning Work Program has been amended to include funding and activity changes in Task 1 and Task 7.

NOW THEREFORE BE IT RESOLVED, the Ocala/Marion County Transportation Planning Organization approves the amended Unified Planning Work Program for 2024/25 to 2025/26 and authorizes the TPO Director to execute all applications, invoices, revisions, amendments, un-encumbrances and de-obligations that may be necessary during the duration of the UPWP.

CERTIFICATE

The undersigned duly qualified and acting Chair of the Ocala/Marion County Transportation Planning Organization hereby certifies that the foregoing is a true and correct copy of a Resolution adopted at a legally convened meeting of the Ocala/Marion County Transportation Planning Organization held on this 28th day of January 2025.

By:



Carl Zalak, III, Chair

Attest:



Rob Balmes, Director

Resolution
No. 24-6

RESOLUTION OF THE OCALA/MARION COUNTY TRANSPORTATION PLANNING ORGANIZATION (TPO) ENDORSING THE AMENDED UNIFIED PLANNING WORK PROGRAM FOR FISCAL YEARS 2024/25 to 2025/26.

WHEREAS, the Ocala/Marion County Transportation Planning Organization, designated by the Governor of the State of Florida as the Metropolitan Planning Organization (MPO) and body responsible for the urban transportation planning process for the Ocala/Marion County area; and

WHEREAS, Title 23 CFR Section 450.308(c) and Florida Statute 339.175(9) require each MPO to develop a Unified Planning Work Program; and

WHEREAS, a Unified Planning Work Program is defined as one to two-year transportation planning work program which identifies the planning budget and the planning activities to be undertaken by the TPO; and

WHEREAS, the Ocala/Marion County Transportation Planning Organization's 2024/25 to 2025/26 two-year Unified Planning Work Program has been prepared to be consistent with Chapter 3 of the Florida Department of Transportation MPO Program Management Handbook.

WHEREAS, the 2024/25 to 2025/26 Unified Planning Work Program was approved by the Ocala/Marion County Transportation Planning Organization on April 23, 2024; and

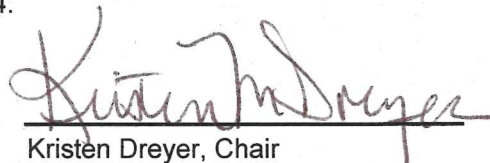
WHEREAS, the Ocala/Marion County Transportation Planning Organization's 2024/25 to 2025/26 Unified Planning Work Program has been amended to include increased funding and corresponding changes to an activity in Task 1, and a new activity in Task 6.

NOW THEREFORE BE IT RESOLVED, the Ocala/Marion County Transportation Planning Organization approves the amended Unified Planning Work Program for 2024/25 to 2025/26 and authorizes the TPO Director to execute all applications, invoices, revisions, amendments, un-encumbrances and de-obligations that may be necessary during the duration of the UPWP.

CERTIFICATE

The undersigned duly qualified and acting Chair of the Ocala/Marion County Transportation Planning Organization hereby certifies that the foregoing is a true and correct copy of a Resolution adopted at a legally convened meeting of the Ocala/Marion County Transportation Planning Organization held on this 27th day of August 2024.

By:


Kristen Dreyer, Chair

Attest:


Rob Balmes, Director

Resolution
No. 24-4

RESOLUTION OF THE OCALA/MARION COUNTY TRANSPORTATION PLANNING ORGANIZATION (TPO) ENDORSING THE UNIFIED PLANNING WORK PROGRAM FOR FISCAL YEARS 2024/25 to 2025/26.

WHEREAS, the Ocala/Marion County Transportation Planning Organization, designated by the Governor of the State of Florida as the Metropolitan Planning Organization (MPO) and body responsible for the urban transportation planning process for the Ocala/Marion County area; and

WHEREAS, Title 23 CFR Section 450.308(c) and Florida Statute 339.175(9) require each MPO to develop a Unified Planning Work Program; and

WHEREAS, a Unified Planning Work Program is defined as one to two-year transportation planning work program which identifies the planning budget and the planning activities to be undertaken by the TPO; and

WHEREAS, the Ocala/Marion County Transportation Planning Organization's 2024/25 to 2025/26 two-year Unified Planning Work Program has been prepared to be consistent with Chapter 3 of the Florida Department of Transportation MPO Program Management Handbook.

WHEREAS, the 2024/25 to 2025/26 Unified Planning Work Program was approved by the Ocala/Marion County Transportation Planning Organization on April 23, 2024; and

NOW THEREFORE BE IT RESOLVED by the Ocala/Marion County Transportation Planning Organization adopts the Unified Planning Work Program for 2024/25 to 2025/26 and authorizes the TPO Director to execute all applications, invoices, revisions, amendments, unencumbrances and de-obligations that may be necessary during the duration of the UPWP.

CERTIFICATE

The undersigned duly qualified and acting Chair of the Ocala/Marion County Transportation Planning Organization hereby certifies that the foregoing is a true and correct copy of a Resolution adopted at a legally convened meeting of the Ocala/Marion County Transportation Planning Organization held on this 23rd day of April 2024.

By:


Kristen Dreuer, Chair

Attest:


Rob Balmes, Director



Florida Department of Transportation

RON DESANTIS
GOVERNOR

605 Suwannee Street
Tallahassee, FL 32399-0450

JARED W. PERDUE, P.E.
SECRETARY

Cost Analysis Certification

Ocala/Marion County TPO

Unified Planning Work Program - FY 2025-2026

Adopted 4/23/2024

Revision Number: Initial Adoption

I hereby certify that the cost for each line item budget category has been evaluated and determined to be allowable, reasonable, and necessary, as required by [Section 216.3475, F.S.](#) Documentation is on file evidencing the methodology used and the conclusions reached.

Name: Kia Powell

MPO Liaison District Five
Title and District

DocuSigned by:

Kia Powell

CF82AD47584A405...
Signature

5/23/2024

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INTRODUCTION

The Unified Planning Work Program (UPWP) outlines the Ocala/Marion County Transportation Planning Organization (Ocala Marion TPO) activities for a two-year period from July 1, 2024 to June 30, 2026 (fiscal years 2024/2025, 2025/2026). The definition of the UPWP is ***“a statement of work identifying the planning priorities and activities to be carried out within a metropolitan planning area. At a minimum, a UPWP includes a description of the planning work and resulting products, who will perform the work, time frames for completing the work, the cost of the work, and the source(s) of funds”*** (23 CFR450.104).

The UPWP is required as a basis and condition for federal funding assistance by the joint planning regulations of the Federal Highway Administration (FHWA) and Federal Transit Administration (FTA). All planning activities in the UPWP must also follow a *Continuing, Cooperative and Comprehensive ('3C') transportation process and be in full compliance with Title 23 United States Code (USC), Sections 134 (Metropolitan Transportation Planning), 135 (Statewide Transportation Planning), Title 49 (Public Transportation) Chapter 53 and Florida Statutes (F.S.) 339.175(9). The UPWP is approved by FHWA and FTA.

FUNDING SOURCES

The UPWP provides a description and estimated budget for nine specific planning tasks. Planning tasks programmed in the UPWP reflect the services anticipated to meet local priorities and requirements of FHWA, FTA and the Florida Department of Transportation (FDOT). The federal and state governments provide funding to support the TPO through FDOT and the Florida Commission for Transportation Disadvantaged (CTD), including two funding sources: FHWA and FTA Planning (PL-CGP funds), and the CTD Transportation Disadvantaged. Local funding is provided to activities that are non-reimbursable through the two grants.

The TPO and FDOT participate in the Consolidated Planning Grant (CPG) program. The CPG enables FDOT, in cooperation with the TPO, FHWA, and FTA, to annually consolidate Florida's FHWA PL and FTA 5305(d) metropolitan planning fund allocations into a single grant that is administered by the FHWA Florida Division. These funds are annually apportioned to FDOT as the direct recipient and allocated to the TPO utilizing formulas approved by the TPO, FDOT, FHWA, and FTA, in accordance with 23 Code of Federal Regulations (CFR) 420.109 and 49 USC Chapter 53. FDOT is fulfilling the CPG's required 18.07% non-federal share (match) using Transportation Development Credits as permitted by 23 CFR 120(i) and FTA C 8100.1D. A summary of all planning activities, budget and matching funds for the two-year period are provided on pages 38 to 41.

*The U.S. Department of Transportation (USDOT) requires the TPO to carry out a **Continuing, Cooperative and Comprehensive (3C)** transportation process. *Continuing*: Planning must be maintained as an ongoing activity and addresses both short-term needs and a long-term vision; *Cooperative*: The process must include the entire region and all partners through a public participation process; and *Comprehensive*: the process must cover all modes of transportation and be consistent with local plans and priorities.

PARTICIPATION PROCESS

The review of the UPWP is accomplished through meetings of the TPO Board (draft and adoption), and Technical Advisory Committee (TAC) and Citizens Advisory Committee (CAC) (draft). The TPO strives to engage citizens and stakeholders to provide feedback in the development of the UPWP. The draft UPWP is provided to the public for a minimum of 30 days prior to adoption by the TPO Board. The TPO uses a variety of methods to engage the public through posting on its website and social media platforms, and sending e-blast and press release notifications. A printed copy of the UPWP is available for public review at the TPO office during regular business hours. The TPO also ensures the UPWP complies with all public involvement provisions identified in Title VI of the Civil Rights Act of 1964 Nondiscrimination Requirements. The public participation process of the UPWP is described in further detail in the TPO's Public Participation Plan (PPP) on the TPO website. **Appendix A** consists of certification statements and assurances for all tasks in the UPWP. **Appendix B** provides a glossary of terms and acronyms used in this document and on a regular basis by the TPO and partner agencies.

PLANNING AREA

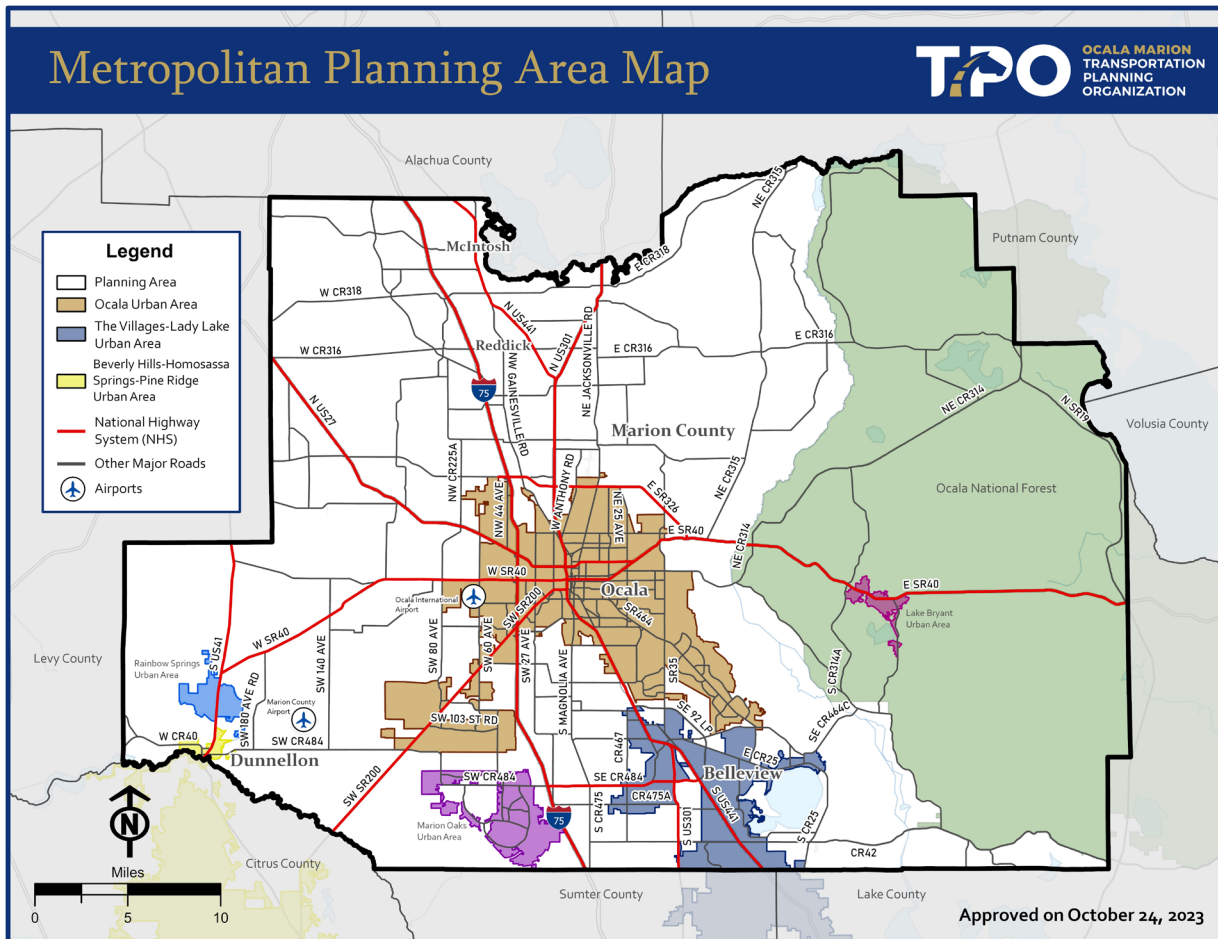
The Ocala Marion TPO is a federally-mandated public agency responsible for the planning and implementation of several modes of transportation, including highway, transit, freight, bicycle, pedestrian and paratransit. The TPO serves the cities of Belleview, Dunnellon, Ocala and unincorporated Marion County. The TPO was established in 1981 after the 1980 Census determined the urbanized area of Ocala exceeded a threshold of 50,000 people. Due to population growth in the 1980s, the TPO Board approved the entirety of Marion County in 1992 as the Metropolitan Planning Area (MPA) displayed in **Figure 1** on the next page. The UPWP incorporates all federal, state, regional and local activities to be performed in the census-designated Urban Areas and all of Marion County.

ORGANIZATION STRUCTURE

TPO Governing Board: The Ocala Marion TPO is governed by a 12-member Board of locally elected officials responsible for the overall guidance of the transportation planning process in Marion County. The Board provides leadership and oversight for the development of transportation policies, plans, programs and strategies. The Board is comprised of: City of Ocala Mayor and four members of the City of Ocala Council; all five Marion County Board of County Commissioners; one member of the City of Belleview City Commission; and one member of the City of Dunnellon City Council. The FDOT District Five Secretary also serves on the TPO Board as a non-voting member. The Board is guided by bylaws, adopted in May 2004 and amended in 2021 and 2022

(<https://ocalamariontpo.org/wp-content/uploads/2021/02/TPO-Bylaws-January-2021.pdf>).

Figure 1: TPO Planning Area



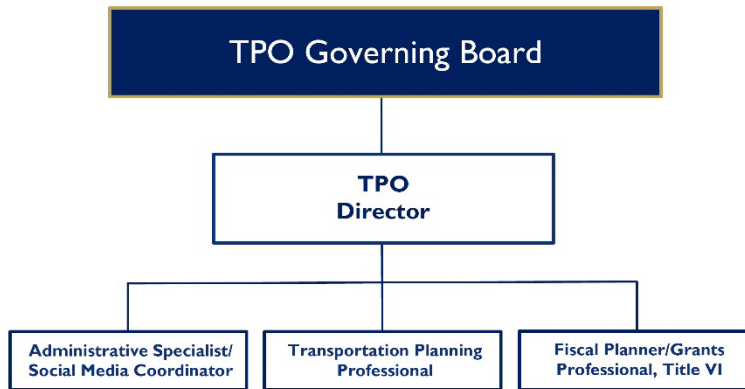
Transportation Disadvantaged Local Coordinating Board (TDLCB): Coordinates transportation needs of the disadvantaged in Marion County, including individuals with physical and economic challenges and senior citizens facing mobility issues.

Citizens Advisory Committee (CAC): Comprised of citizens from all areas of Marion County and its municipalities. Its primary function is to advise the TPO Board on local transportation issues based on the input of citizens in the area they represent.

Technical Advisory Committee (TAC): Comprised of planners, engineers, and other local and state professionals that review TPO plans, programs and projects from a technical perspective, offering recommendations to the TPO Board.

TPO Staff: The TPO is comprised of professional staff members, including a Director, Grants Coordinator/Fiscal Planner, Administrative Specialist/Social Media Coordinator and a Transportation Planning professional. **Figure 2** displays the current staff organization chart of the TPO.

Figure 2: TPO Staff Organization Chart



AGREEMENTS

The TPO executes agreements to support and facilitate the transportation planning process. An **Interlocal Agreement** was signed in June 2016 by the TPO’s four local governments and FDOT. The Agreement establishes the TPO as the official planning agency for the Ocala Urban Areas and MPA as shown in Figure 1. Additional **Joint Participation Agreements (JPA)** have been executed for maintaining continued federal and state match funding. The **Metropolitan Planning Organization Agreement** was last approved in May 2022 and will be revised in 2024 as part of the budgetary process with FDOT for CPG funding. In December 2020, a revised **Joint Intergovernmental Coordination and Review (ICAR) and Public Transportation Agreement** was approved between FDOT, the TPO, East Central Florida Regional Planning Council, City of Ocala and Marion County.

In January 2020, the TPO entered into a revised five-year **Staff Services Agreement** with the Marion County Board of County Commissioners for the County to provide support services and an office facility to the TPO. The agreement also includes a Cost Allocation Plan that the TPO is responsible for payment on a monthly basis to Marion County for indirect services.

The JPA of March 4, 1991, involving the Commission for the Transportation Disadvantaged (CTD) established the TPO as the **Designated Official Planning Agency (DOPA)** for transportation disadvantaged planning in Marion County. This JPA also established the Ocala Marion TDLCB. The TDLCB meets on a quarterly basis as managed by the TPO.

The TPO is part of the **Central Florida Metropolitan Planning Organization Alliance (CFMPOA)** and party to an **Interlocal Agreement** with six MPOs, updated in 2018 and 2016.

In 2020, the TPO entered in a **Interlocal Metropolitan Planning Agreement** with the Lake~Sumter Metropolitan Planning Organization to formalize ongoing collaboration for transportation activities in Marion, Lake and Sumter counties.

TPO agreements, bylaws for boards and committees, and the Continuity of Operations Plan (COOP) are located on the TPO website (<https://ocalamariontpo.org>).

PLANNING EMPHASIS AREAS

The transportation planning activities of the UPWP are aligned with the ‘3C’ process and follow specific organizational, federal and state emphasis areas. This section summarizes how the UPWP tasks in fiscal years (FY) 2024/25 and 2025/26 are guided by planning emphasis areas.

Long Range Transportation Plan

The **2045 Long Range Transportation Plan (LRTP)** outlines the vision for transportation in Marion County for the next 20 to 25 years. The LRTP reflects input and guidance from government officials, citizen’s advisory boards, technical experts, community stakeholders and the general public. The LRTP is also used to forecast future travel demands in Marion County. The 2045 LRTP was adopted by the TPO Board on November 24, 2020 and includes a Needs Assessment and Cost Feasible Plan. Selected projects from the Cost Feasible Plan are identified in the Transportation Improvement Program (TIP) and List of Priority Projects (LOPP). These projects are prioritized on an annual basis. The vision and goals of the 2045 LRTP serve as guidance to transportation planning by the TPO, state and local partners.

2045 LRTP Vision

“Develop a safe, convenient and accessible multimodal transportation system that supports a vibrant economy, preserves existing assets, and protects the natural environment.”

2045 LRTP Goals

1. Optimize and preserve existing infrastructure.
2. Focus on improving safety and security of the transportation system.
3. Provide efficient transportation that promotes economic development.
4. Promote travel choices that are multimodal and accessible.
5. Ensure the transportation system meets the needs of the community.
6. Protect natural resources and create quality places.

Federal Planning Factors

In November 2021, the Investment in Infrastructure Jobs Act (IIJA) was signed into law. The IIJA serves as the primary five-year surface transportation legislation, authorizing funding for highway programs over fiscal years 2022 through 2026. The IIJA includes over a dozen new highway programs involving both formula and discretionary federal funds. The IIJA also carried forward the required planning factors modified in the 2015 Fixing America’s Surface Transportation Act (Fast Act), which increased them from eight to ten. The ten planning factors (next page) shall be considered by the TPO as part of the development of transportation plans and programs. The planning factors are outlined in Title 23 USC, Section 134(h) and listed on the next page. The TPO will update the UPWP, as needed, when new federal regulations and guidelines become available.

Ten Federal Planning Factors:

1. Support the economic vitality of the metropolitan area, especially by enabling global competitiveness, productivity, and efficiency;
2. Increase the safety of the transportation system for motorized and non-motorized users;
3. Increase the security of the transportation system for motorized and non-motorized users;
4. Increase the accessibility and mobility of people and for freight;
5. Protect and enhance the environment, promote energy conservation, improve quality of life, promote consistency between transportation improvements and State and local planned growth and economic development patterns;
6. Enhance the integration and connectivity of the transportation system, across and between modes, for people and freight;
7. Promote efficient system management and operation;
8. Emphasize the preservation of the existing transportation system;
9. Improve the resiliency and reliability of the transportation system and reduce or mitigate stormwater impacts of surface transportation; and
10. Enhance travel and tourism.

Figure 3 summarizes how the TPO’s UPWP integrates the ten planning factors in the transportation planning process by federally funded tasks.

Figure 3: Ten Federal Planning Factors and UPWP Tasks

UPWP Task	1	2	3	4	5	6	7	8	9	10
1. Administration	X	X	X	X	X	X	X	X	X	X
2. Data Collection	X	X	X	X		X	X	X	X	
3. Long Range Planning	X	X	X	X	X	X	X	X	X	X
4. Short Range Planning	X	X	X	X	X	X	X	X	X	X
5. Public Transportation	X	X	X	X	X	X	X			X
6. Public Involvement	X	X	X	X	X	X	X	X	X	X
7. Special Projects	X	X	X	X	X	X	X	X	X	X
8. Regional Activities	X	X	X	X	X	X	X	X	X	X

Federal Planning Emphasis Areas (PEA)

On December 30, 2021, FHWA and FTA jointly issued updated Planning Emphasis Areas (PEA). PEAs are specific areas the TPO shall integrate into the ongoing 3C planning work in Ocala/Marion County. The following provides a summary of the eight (8) federal PEAs. **Appendix C** contains more detailed information regarding the eight federal PEAs.

Eight Federal Planning Emphasis Areas (PEA):

1. Tackling the Climate Crisis: Transition to Clean Energy, Resilient Future
2. Equity and Justice in Transportation Planning
3. Complete Streets
4. Public Involvement
5. Strategic Highway Network (STRAHNET)/U.S. Department of Defense (DOD) Coordination
6. Federal Land Management Agency (FLMA) Coordination
7. Planning and Environmental Linkages (PEL)
8. Data in Transportation Planning

Florida Planning Emphasis Areas

The FDOT develops Planning Emphasis Areas on a two-year cycle in coordination with Metropolitan Planning Organizations' UPWP documents. The Emphasis areas set planning priorities that are supportive of the statewide Florida Transportation Plan (FTP), and give importance to topics that all MPO's are encouraged to address in their respective planning programs. **Figure 4** illustrates the TPO's consideration of the Florida Planning Emphasis Areas in the transportation planning process over the two-year period.

Figure 4: Florida Planning Emphasis Areas and UPWP Tasks

UPWP Task	Safety	Equity	Resilience	Emerging Mobility
1. Administration	X	X	X	X
2. Data Collection	X	X	X	
3. Long Range Planning	X	X	X	X
4. Short Range Planning	X	X	X	X
5. Public Transportation	X	X		X
6. Public Involvement	X	X	X	X
7. Special Projects	X	X	X	X
8. Regional Activities	X	X	X	X

Appendix C contains further background information from FDOT's Office of Policy Planning. The Florida Planning Emphasis Areas are summarized as follows:

Safety

The FTP and the State's Strategic Highway Safety Plan place top priority on safety, with a state target of zero traffic fatalities and serious injuries. In addition to adopting safety targets, the MPOs must show how their LRTPs and priority projects in their TIPs support progress toward those targets. The UPWP should consider enhancements to data analyses and community involvement to better inform the identification and prioritization of safety projects.

Equity

Executive Order 14008, Tackling the Climate Crisis at Home and Abroad, created the “Justice40 Initiative” that aims to deliver 40 percent of the overall benefits of relevant federal investments to disadvantaged communities. This initiative supports Executive Order 13985, Advancing Racial Equity and Support for Underserved Communities Through the Federal Government, outlines federal policy and defines equity as the consistent and systematic fair, just, and impartial treatment of individuals. The FTP seeks transportation choices that improve accessibility and equity by including a key strategy to enhance affordable transportation, service, and information access options for all ages and abilities and throughout underserved communities. The MPOs are key to identifying and implementing improvements based on data-driven project prioritization that considers not only impacts of transportation projects on a community, but also benefits of projects that can enhance opportunities for a community. The UPWP should address approaches to furthering transportation equity.

Resilience

With the passage of the FAST Act, resilience was introduced as a federal planning factor: “Improve the resilience and reliability of the transportation system and mitigate stormwater impacts of surface transportation.” Resilience is defined as the ability to adapt to changing conditions and prepare for, withstand, and recover from disruption. These conditions can encompass a wide variety of environmental, technological, economic, or social impacts.

MPOs can address resilience within their planning processes by leveraging tools such as the *FHWA Resilience and Transportation Planning Guide* and the *FDOT Quick Guide: Incorporating Resilience* in the MPO LRTP. It should be noted that while these documents focus primarily on the development of MPO LRTPs and TIPs, addressing resilience should be a consideration within every planning document prepared by an MPO. MPOs should place a particular emphasis on coordination with agency partners responsible for natural disaster risk reduction, or who may be developing local resilience planning initiatives. Additionally, MPOs should consider the additional costs associated with reducing vulnerability of the existing transportation infrastructure. Proactive resiliency planning will help the MPO develop planning documents that are ultimately more realistic and cost-effective.

Emerging Mobility

Advances in communication and automation technology result in new mobility options, ranging from automated and connected transport, electric vehicles, ridesharing, and micro-mobility, to flying cars and space travel. These changes may be disruptive and transformational, with impacts to safety, vehicle ownership, travel capacity, vehicle miles traveled, land-use, transportation design, future investment demands, supply chain logistics, economy, and the workforce. Implementation of all seven goals of the Florida Transportation Plan can be furthered through both the transformation of major corridors and hubs and the expansion of transportation infrastructure to embrace and support the adoption of emerging

mobility. The UPWP should recognize the important influence of emerging mobility on the multimodal transportation system and include related planning studies, collaboration efforts, research, or other activities.

FDOT District Five Planning Activities

The following summarizes the major planning activities of FDOT District Five for the two-year period. **Appendix C** contains more detailed information regarding District planning activities.

Improve Safety

FDOT's mission and top priority is to create a safe, efficient transportation system for all road users in the state of Florida. To continually improve the safety of the traveling public, FDOT participates in several safety campaigns throughout the year, consistently spreads awareness of safety practices through its communication and social media channels, and follows safety standards in every project, every time. FDOT supports the mission of Vision Zero by implementing Target Zero initiatives and by collaborating with our partners to reach zero fatalities and serious injuring on all roads in Florida.

Enhance Mobility

As Florida continues to gain more than 600 residents a day and welcomes more than 126 million annual visitors, it is essential to enhance mobility throughout the state to accommodate its consistent and rapid growth. The Florida Department of Transportation is committed to continuing to enhance our state's transportation system to fit the current and future needs of our residents and visitors. Whether that's through the expansion or enhancement of existing roadways or increased multimodal options, we are committed to building the Florida of the future.

Inspire Innovation

Since it was created, FDOT has been consistently creating innovative solutions to solve transportation challenges throughout the state and has become a leader in transportation across the country. The transportation industry is evolving at a rapid pace, and one of our goals at FDOT is to inspire innovation in everything we do. FDOT is proud to employ some of the best and brightest individuals. In order to continue to provide a safe, efficient transportation system for Florida's residents and visitors and prepare for the future, FDOT encourages every employee to think outside of the box. From the everyday processes we use to complete our work to incorporating the latest technologies, let us be forward-thinking in all we do.

Additional Planning Activities

- MPO Program Management
- Regional Planning
- Environmental Management

PLANNING PRIORITIES

The following summarizes the major planning priorities of the TPO during the FY 2024/25 and FY 2025/26 two-year period. Some activities are identified as ongoing or as needed based on changes to federal and state requirements and organizational priorities.

2045 Long Range Transportation Plan (LRTP)

The TPO will actively manage the 2045 LRTP and process amendments or modifications, as needed, to ensure projects are included in the Needs and/or Cost Feasible Elements.

2050 Long Range Transportation Plan (LRTP)

The TPO began development of the 2050 LRTP in FY 2024. The 2050 LRTP is required to be adopted by the TPO Board by November 24, 2025. Activities in this UPWP include completion of the LRTP as identified specifically in a consultant contract, scope of work, TPO staff project management plan and the public/partner agency participation process.

Transportation Improvement Program (TIP)

The TPO will actively manage the FY 2025 to 2029 TIP, including amendments and modifications. The Roll Forward Amendment will be approved by the TPO Board in September or October 2024 and 2025. TPO staff will develop the FY 2026 to 2030 TIP, scheduled for adoption by June 2025. The following fiscal year will involve development of the FY 2027 to 2031 TIP, scheduled for adoption by June 2026.

Transportation Disadvantaged Local Coordinating Board (TDLCB)

The TPO serves the transportation disadvantaged community of Marion County in partnership with representative agencies and the Community Transportation Coordinator (CTC), currently Marion Senior Services. The TPO will be involved in several major activities including an annual update and five-year major update to the Transportation Disadvantaged Service Plan (TDSP), annual CTC Evaluations, new CTC selection process, quarterly TDLCB meetings and annual workshops. Work completed for the major TDSP update will be tied to a Scope of Work, Consultant supplemental support and a public outreach/partner participation process.

Active Transportation Plan

In coordination with the 2050 LRTP, the TPO will develop an Active Transportation Plan for bicycle, pedestrian, trail, complete streets and equestrian users in the TPO Planning Area. This project includes an assessment of the economic, recreational, health and community impacts of active transportation in Marion County. Work completed will be tied to a scope of work, consultant supplemental support and a public outreach/partner participation process.

Congestion Management Plan (CMP), State of System Report

The TPO plans to update the CMP State of the System Report every two to three years. During this UPWP, the TPO will complete one update. Work completed will be tied to a scope of work, consultant support and a partner agency participation process.

Safety Planning Implementation

Improving safety for all modes and users is critical to the future of transportation in Marion County. In 2022, the TPO, in collaboration with its state and local government partners adopted the Commitment to Zero Safety Action Plan. As part of planning implementation, the TPO will identify and support projects that improve safety, including multimodal and complete streets. The TPO will also be involved in supporting grants; updating the Commitment to Zero online dashboard, annual report and project list; improving education and awareness; reviewing the High Injury Network (HIN); and implementation strategies in the Action Plan.

Resiliency Planning

Improving resiliency is crucial to the long-term viability of the transportation system in Ocala/Marion County. As a follow-up to the Transportation Resilience Guidance Paper published in February 2022, the TPO will assess the further development of planning tools and/or a master planning project. The TPO will also identify and support resilience projects, data/information, grants, education and other opportunities.

Transportation Studies

The TPO may lead and manage professional planning activities, as needed, such as the completion of trail studies, congestion management studies, complete streets or safety studies, and transit studies. The UPWP will be amended as specific studies are formalized and funding is available.

Unified Planning Work Program

The TPO will actively manage the 2024/2025 to 2025/2026 UPWP, including amendments and modifications. The development of the next UPWP for fiscal years 2026/2027 to 2027/2028 will be undertaken from January to April 2026.

During the two-year UPWP period, the TPO will also review and update, as needed, the following planning program documents.

- Commitment to Zero Safety Action Plan and Project List
- Disadvantaged Business Enterprise (DBE) Program
- Public Participation Plan (PPP)
- Title VI Non-Discrimination Plan

TASKS AND BUDGET

The planning activities of the UPWP are organized into nine specific tasks. Each task provides an overview of the work completed in the previous UPWP, activities planned for the two-year period, funding sources and budget. Summary budget tables are provided on pages 38 to 41.

Task 1: Administration: Identifies all administrative functions to carry out the continuous, cooperative and comprehensive transportation planning process for the TPO planning area.

Task 2: Data Collection and Analysis: Includes the collection and analysis of socioeconomic, traffic, crash, land use, and other transportation related data on a continuing basis in order to document changes within the TPO planning area.

Task 3: Long Range Planning: Includes work related to the maintenance and development of the 2045 and 2050 Long-Range Transportation Plans (LRTP), congestion management process and transportation performance-based planning.

Task 4: Short Range Planning: Includes development of the annual Transportation Improvement Program (TIP) and List of Priority Projects (LOPP) development process.

Task 5: Public Transportation: Includes all work items related to the Transportation Disadvantaged (TD) Program and the public transportation system in Marion County.

Task 6: Public Involvement: Describes the activities used to encourage and solicit public participation in the '3C' transportation planning process.

Task 7: Special Projects: Identifies short-term projects, plans and/or planning studies undertaken and managed by the TPO.

Task 8: Regional Activities: Identifies the transfer of funds to MetroPlan in support of the Central Florida Metropolitan Planning Organization (MPO) Alliance regional coordination.

Task 9: Local Fund: Identifies expenditures that are non-reimbursable from state and federal grant sources, provided by local governments.

Budget categories for the UPWP are as follows:

A. Personnel	Salaries and fringe benefits. Fringe includes retirement, FICA, health insurance, workers compensation, life insurance.
B. Consultant	Costs for consulting services in support of TPO planning activities.
C. Travel	Costs for travel related to TPO activities. This includes costs associated with training and educational related activities.
D. Direct Expenses	Costs for public advertising, office supplies, computer equipment, furniture, copier, postage, printing, software, cell phones, professional dues, room rental, insurance, etc.
E. Indirect Expenses	Marion County Cost Allocation through Staff Services Agreement.

State Soft Match

Section 120 of Title 23, USC, permits FDOT to use toll revenue expenditures as a credit (non-cash) toward the non-federal matching share of authorized MPO programs. This credit, referred to as a soft-match, is listed as FDOT state funds in the agency participation tables on pages 38 to 41. The total soft match provided by FDOT is 18.07% of the CPG grant. The soft-match replaces the required local cash-match to the CPG funding allocated to the TPO.

FHWA Approval

Any purchase by the TPO equal to or greater than \$5,000 shall require the pre-approval of the FHWA per Section 200 of Title 2, USC.

Indirect Rate – Cost Allocation Plan

Per the Staff Services Agreement between the TPO Governing Board and Marion County Board of County Commissioners, calculated indirect rates are used by the Office of the Marion County Clerk of the Circuit Court and Comptroller to recover indirect costs of the TPO. These rates are derived from an annual Cost Allocation Plan completed by the Clerk of the Circuit Court and Comptroller. The Plan is prepared in compliance with Section 200 of Title 2, USC. The Plan was presented and approved in 2021 by the TPO Board and the FDOT. **Appendix E** contains the most current Cost Allocation rate, prior rates, and the Staff Services Agreement with Marion County.

FUNDING SUMMARY

The following chart summarizes the total funding by source for the FY 2024/2025 and FY 2025/2026 UPWP. The CPG is reflected as FHWA PL in each of the UPWP task tables in both fiscal years for reporting purposes. However, as noted, the CPG contains FHWA and FTA planning funds. The total for FY 2024/2025 includes de-obligated CPG funding from the prior UPWP (\$445,000). This funding is available after October 1, 2024.

Funding Source	Fiscal Year 2024/2025	Fiscal Year 2025/2026
Consolidated Planning Grant (CPG)	\$1,128,631	\$682,743
CTD (Transportation Disadvantaged)	\$30,735	\$30,735
Local Funding	\$1,800	\$1,800
Total:	\$1,161,166	\$715,278

TASK 1: ADMINISTRATION

Purpose

Conduct all administrative related functions necessary to carry out the '3C' (continuous, cooperative and comprehensive) transportation planning process for the TPO planning area.

Previous Work Completed

Summary of completed administrative activities in FY 2022/23 and FY 2023/24.

- Administration of all TPO meetings, workshops, agendas and public notices.
- Documentation of all TPO meetings, including minutes, recordings and files.
- Completion of financial and invoicing tasks for the PL-CPG and 5305d grant reimbursement process through FDOT.
- Travel and attendance to Central Florida MPO Alliance (CFMPOA) and Metropolitan Planning Organization Advisory Council (MPOAC) meetings.
- Development of regional priority projects lists, including coordination with local partners, committees, TPO Board and the CFMPOA.
- Coordination and meetings with MPO/TPO, local, state and federal partners.
- Completion of FY 2022/23 to 2023/24 UPWP and amendments or modifications.
- Completion of updates to the bylaws for the TPO Board, CAC and TAC.
- Completion of the annual Joint Certification with FDOT in 2023 and 2024.
- Updated the TPO Disadvantaged Business Enterprise (DBE) Program in 2022.
- Completed the TPO Continuity of Operations Plan (COOP) in 2022.
- Coordination with FDOT and local governments on Census activities.
- Adoption of 2023 Apportionment Plan.
- Monitored DBE participation and report payments for work completed.
- Staff and TPO Board travel to meetings, trainings, conferences and workshops.
- Review of federal and state legislation involving programs to MPO/TPO's.
- Coordination with Marion County Departments, including Human Resources, Payroll, Procurement, IT, Administration and Clerk of the Court and Comptroller.
- Annual host agency Marion County budget process conducted through the Marion County Clerk of the Court and Comptroller.
- Staff management, timesheets, interviews and personnel changes.
- Staff Services Agreement with Marion County review.
- Ongoing communication with TPO Board members regarding budget status.
- Completed a TPO Board 101 Workshop, including presentation materials.
- Procurement and contracting with consultants for tasks and projects.
- Procurement of office supplies, equipment and software licenses.
- Management of travel and training for staff and TPO Board members.
- Printing of information for meetings and workshops.

Required Activities

The Task 1 activities planned for FY 2024/25 and FY 2025/26, including end products and completion dates are summarized as follows.

Activity	End Product(s)	Completion Date(s)
Staff support, administration and *security of TPO committees, boards, meetings, workshops	Meetings, packets, public notifications, minutes	Monthly
Financial tasks, grant and budget management, maintenance of electronic files and records	Budgets for UPWP	Ongoing
Process timesheets, payroll and monthly/quarterly progress reporting	Staff timesheets, progress reports	Bi-weekly
Prepare and submit invoices for federal grants, progress reports and backup documentation	Invoices, progress reports for federal grants	Monthly, Quarterly
Amend, update FY 24/25 to FY 25/26 UPWP	FY 25-26 updated UPWP	As needed
Complete FY 26/27 to FY 27/28 UPWP	FY 27-28 new UPWP	May 2026
Prepare financial budgets for host agency	Clerk of Court Budgets	May 2025, 2026
TPO Board budget updates	Budget Summary Reports	Quarterly
Participate in annual Joint FDOT/TPO Certification process	Certification Reports, Certification Statements	March/April 2025, 2026
Participation in MPOAC and CFMPOA, regional and statewide partner meetings, trainings	Meetings, trainings,	Quarterly, Ongoing
Coordination with MPOAC, CFMPOA on regional planning and project prioritization	State planning and coordination	Ongoing
Coordinate and attend meetings with federal, state, regional and local partners	Meeting participation	Ongoing
Maintain and update TPO agreements, board and committee bylaws	Revised agreements, bylaws	As needed
Update Continuity of Operations Plan (COOP) and Process Documentation	COOP document, Process documentation	Ongoing, As needed
Monitor legislative activities at the federal, state, local levels affecting transportation	Summary reports, documentation	Ongoing
Manage consultant support services and contracts, scopes and task work orders	Consultant contract(s), task work orders	Ongoing, As needed
Office supplies, computer equipment	Supplies and Equipment	As needed
Cell phones; Softw. license renewals, purchases (ArcGIS, Pagefreezer, Microsoft Office, Teams, BIS/DCR, Kronos, Clockify, Adobe Pro, Adobe Cloud); News subscriptions	Software licenses, Cell phone services, news subscriptions	Ongoing, Annual
Printing of materials for education and outreach	Printed materials	As needed
Travel and training for TPO staff and TPO Board	Meetings, conferences	Ongoing
Monitor DBE participation and report payments	Summary report(s)	Monthly
#Conduct Single Audit for Federal Funds	Professional Audit	As Needed

*Consultant support (security contractor, local law enforcement as needed)

Auditor to perform audit of federal funds expended if the TPO meets audit and reporting requirements of the Single Audit Act 2 CFR 200.501, Florida Statute 215.97 (\$750,000 or more federal funds in a fiscal year)

Responsible Agency

Ocala Marion TPO

Responsible Staff

Ocala Marion TPO, Consultants

Budget Summary

The estimated budgets for Task 1 are summarized in Tables 1A and 1B.

Table 1A: Task 1 Administration, FY 2024/2025

Task 1 Administration, FY 2024/2025			
Funding Source	FHWA PL G2W15	CTD	Total
Contract			
Budget Category			
A. Personnel			
Salaries and Benefits	\$ 245,398	\$ -	\$ 245,398
Total:	\$ 245,398	\$ -	\$ 245,398
B. Consultant			
Security Services for Meetings	\$ 1,000	\$ -	\$ 1,000
Total:	\$ 1,000	\$ -	\$ 1,000
C. Travel			
Travel Expenses	\$ 10,250	\$ 985	\$ 11,235
Training and Education	\$ 6,100	\$ 400	\$ 6,500
Total:	\$ 16,350	\$ 1,385	\$ 17,735
D. Direct Expenses			
Advertising/Public Notices	\$ 1,200	\$ 1,200	\$ 2,400
Computer Equipment	\$ 7,500	\$ -	\$ 7,500
Copier Rental	\$ 3,600	\$ -	\$ 3,600
Insurance	\$ 3,500	\$ -	\$ 3,500
Meeting Room Rental	\$ 2,000	\$ -	\$ 2,000
Office Supplies	\$ 5,160	\$ 100	\$ 5,260
Postage	\$ 100	\$ 25	\$ 125
Printing and Binding	\$ 750	\$ -	\$ 750
Software Licenses, Subscriptions, Cell Phones	\$ 18,000	\$ -	\$ 18,000
Total:	\$ 41,810	\$ 1,325	\$ 43,135
E. Indirect Expenses			
Marion County Cost Allocation	\$ 56,945	\$ 1,761	\$ 58,706
Task Total:	\$ 361,503	\$ 4,471	\$ 365,974

Task 1 includes \$10,000 of de-obligated FHWA PL funding. Available after October 1, 2024 with FHWA approval

Table 1B: Task 1 Administration, FY 2025/2026

Task 1 Administration, FY 2025/2026				
Budget Category	Funding Source Contract	FHWA PL G2W15	CTD	Total
A. Personnel				
Salaries and Benefits		\$ 271,013	\$ -	\$ 271,013
	Total:	\$ 271,013	\$ -	\$ 271,013
B. Consultant				
Security Services for Meetings		\$ 500	\$ -	\$ 500
Professional Audit		\$ 1,000	\$ -	\$ 1,000
	Total:	\$ 1,500	\$ -	\$ 1,500
C. Travel				
Travel Expenses		\$ 11,300	\$ 985	\$ 12,285
Training and Education		\$ 6,200	\$ 400	\$ 6,600
	Total:	\$ 17,500	\$ 1,385	\$ 18,885
D. Direct Expenses				
Advertising/Public Notices		\$ 1,200	\$ 1,200	\$ 2,400
Computer Equipment		\$ 7,500	\$ -	\$ 7,500
Copier Rental		\$ 3,800	\$ -	\$ 3,800
Insurance		\$ 3,800	\$ -	\$ 3,800
Meeting Room Rental		\$ 2,000	\$ -	\$ 2,000
Office Supplies		\$ 5,350	\$ 100	\$ 5,450
Postage		\$ 100	\$ 25	\$ 125
Printing and Binding		\$ 750	\$ -	\$ 750
Software Licenses and Subscriptions		\$ 16,500	\$ -	\$ 16,500
	Total:	\$ 41,000	\$ 1,325	\$ 42,325
E. Indirect Expenses				
Marion County Cost Allocation		\$ 58,395	\$ 1,805	\$ 60,200
	Task Total:	\$ 389,408	\$ 4,515	\$ 393,923

TASK 2: DATA COLLECTION

Purpose

Conduct data collection and corresponding analysis activities from a number of sources including the City of Ocala, Belleview, Dunnellon, Marion County, FDOT, University of Florida, federal agencies, law enforcement, among others. This data is used in the development of geographic information systems (GIS) online applications and maps, the annual TPO Traffic Counts Report, Commitment to Zero Dashboard and Annual Report, support for the Congestion Management Plan (CMP), and other related tasks.

Previous Work Completed

Summary of completed data collection activities in FY 2022/23 and FY 2023/24.

- Completion of 2022 and 2023 Traffic Counts Reports.
- Completion of online interactive and static maps and database updates for TPO website, including Traffic Counts, Transportation and Community Features, Transportation Improvement Program, Congestion Management Plan and Long-Range Transportation Plan.
- Coordination and review of traffic counts collection with FDOT, City of Ocala and Marion County.
- Collection of crash data and information from FDOT and University of Florida Signal Four Analytics database and other sources.
- Participation in Marion County Community Traffic Safety Team (CTST).
- Data collection support of the Congestion Management Plan (CMP) and updates.
- Participation in the regional Transportation Systems Management and Operations (TSM&O) work group.

Required Activities

The Task 2 activities planned for FY 2024/25 and FY 2025/26, including end products and completion dates are as follows.

Activity	End Product(s)	Completion Date(s)
Completion of annual Traffic Counts Reports	Summary Report and online maps.	June 2025, 2026
*Updates to interactive and static maps for TPO website (safety dashboard, traffic counts, multimodal transportation network features, congestion management, resiliency and others)	Online interactive maps on TPO website	Ongoing
Participation in Community Traffic Safety Team (CTST), Transportation Systems Management and Operations (TSM&O) and other groups	Meetings, workshops	Monthly, Ongoing

*Data collection and information to support update to the Congestion Management Plan (CMP) State of System Report	Congestion Management Plan (CMP) State of System update	June 2026
Central Florida Regional Planning Model (CFRPM) review, support and coordination	CFRPM participation	Ongoing, As needed
*Data collection to support updates on Commitment to Zero Dashboard and Summary Report	Updated Dashboard, Annual Summary Report	Annual 2025, 2026
General data collection, GIS and map development in support of transportation planning activities and projects	Databases, maps, documents	Ongoing, As needed

*Consultant support (As identified in a Task Order, Scope of Work)

Responsible Agency

Ocala Marion TPO

Responsible Staff

Ocala Marion TPO, Consultants

Budget Summary

The estimated budgets for Task 2 are summarized in Tables 2A and 2B.

Table 2A: Task 2 Budget, FY 2024/2025

Task 2 Data Collection, FY 2024/2025				
Budget Category	Funding Source Contract	FHWA PL G2W15	CTD	Total
A. Personnel				
Salaries and Benefits		\$ 22,162	\$ -	\$ 22,162
	Total:	\$ 22,162	\$ -	\$ 22,162
B. Consultant				
Consultants		\$ -	\$ -	\$ -
	Total:	\$ -	\$ -	\$ -
	Task Total:	\$ 22,162	\$ -	\$ 22,162

Table 2B: Task 2 Budget, FY 2025/2026

Task 2 Data Collection, FY 2025/2026				
Budget Category	Funding Source Contract	FHWA PL G2W15	CTD	Total
A. Personnel				
Salaries and Benefits		\$ 21,018	\$ -	\$ 21,018
	Total:	\$ 21,018	\$ -	\$ 21,018
B. Consultant				
Consultants		\$ -	\$ -	\$ -
	Total:	\$ -	\$ -	\$ -
	Task Total:	\$ 21,018	\$ -	\$ 21,018

TASK 3: LONG RANGE PLANNING

Purpose

Conduct activities that support the long-term implementation of TPO transportation programs, plans and projects. Also included are activities that support transportation needs on a local or regional level.

Previous Work Completed

Summary of completed long-range planning activities in FY 2022/23 and FY 2023/24.

- Two amendments completed to the 2045 Long Range Transportation Plan (LRTP), including public hearings.
- Updates and adoption of federally required performance measures, including PM-1 Safety, PM-2 Bridge and Pavement, PM-3 System Performance and PTASP transit, and development of Greenhouse Gas (GHG) targets.
- Coordination with local and regional partners on planning initiatives, local and regional trails and other major projects.
- Coordination with local partners and FDOT District Five on Strategic Intermodal System (SIS) project planning and priorities.
- Completed an update to the Congestion Management Plan (CMP) State of System Report, including comprehensive database and online maps.
- Development of CMP online resource page on TPO website.
- Development of the Scope of Work for the 2050 LRTP.
- Conducted the procurement process for selection of a Consultant to support the 2050 LRTP development.
- Commencement of the 2050 LRTP, including project management plan, schedule, kick-off meeting, internal staff roles, and other initial phases, tasks of the project.

Required Activities

The Task 3 activities planned for FY 2024/25 and FY 2025/26, including end products and completion dates are as follows.

Activity	End Product(s)	Completion Date(s)
Complete modifications or amendments to the 2045 Long Range Transportation Plan (LRTP)	Update/Amend the 2045 LRTP	Ongoing, As needed
*Development and completion of the 2050 multimodal LRTP, including project management, data collection and analysis, technical documents, maps, chapter elements, partner and public participation process, coordination, LRTP draft and final documents	Adopted 2050 LRTP Plan with all documentation, technical appendices, online maps, electronic files	December 2025

Data collection and analysis for all federally required performance measures, including PM-1, PM-2, PM-3, Greenhouse Gas (GHG) Emissions, PTASP	Updated information to support target setting	Annual, Biennial, As Needed 2025, 2026
Updated reports on the federally required performance measures, including safety targets	Annual reports and safety target setting	February 2025, 2026
Coordination on local, regional projects and transportation studies with partner agencies related to the LRTP, TIP and other planning documents	Meetings, technical support and review of documents	As Needed, Ongoing
*Completion of Congestion Management Plan (CMP) State of System Report	CMP State of System Report update	June 2026

*Consultant support (As identified in a Contract, Task Order and Scope of Work)

Responsible Agency

Ocala Marion TPO

Responsible Staff

Ocala Marion TPO, Consultants

Budget Summary

The estimated budgets for Task 3 are summarized in Tables 3A and 3B.

Table 3A: Task 3 Budget, FY 2024/2025

Task 3 Long-Range Planning, FY 2024/2025				
Budget Category	Funding Source Contract	FHWA PL G2W15	CTD	Total
A. Personnel				
Salaries and Benefits		\$ 74,487	\$ -	\$ 74,487
	Total:	\$ 74,487	\$ -	\$ 74,487
B. Consultant				
2050 Long Range Transportation Plan		\$ 330,000	\$ -	\$ 330,000
Consultants		\$ -	\$ -	\$ -
	Total:	\$ 330,000	\$ -	\$ 330,000
	Task Total:	\$ 404,487	\$ -	\$ 404,487

Task 3 includes \$238,000 of de-obligated FHWA PL funding. Available after October 1, 2024 with FHWA approval

Table 3B: Task 3 Budget, FY 2025/2026

Task 3 Long-Range Planning, FY 2025/2026				
Budget Category	Funding Source Contract	FHWA PL G2W15	CTD	Total
A. Personnel				
Salaries and Benefits		\$ 45,431	\$ -	\$ 45,431
	Total:	\$ 45,431	\$ -	\$ 45,431
B. Consultant				
2050 Long Range Transportation Plan		\$ 50,000	\$ -	\$ 50,000
CMP State of System Update		\$ 30,500	\$ -	\$ 30,500
	Total:	\$ 80,500	\$ -	\$ 80,500
	Task Total:	\$ 125,931	\$ -	\$ 125,931

TASK 4: SHORT RANGE PLANNING

Purpose

Conduct activities that support the short-term implementation of TPO transportation programs and projects. Also included are activities in support of the annual development and updates to the Transportation Improvement Program (TIP) and List of Priority Projects (LOPP).

Previous Work Completed

The completed short-range planning activities of the TPO in FY 2022/23 and FY 2023/24.

- Developed the annual TIP for both FY 2024 to 2028 and FY 2025 to 2029, including public and partner review/participation process.
- Development of a revised TIP document format to support public access.
- Development of updated and revised TIP interactive online maps.
- Processed TIP amendments and modifications, including the annual Roll Forward.
- Assisted local governments with submission of applications to FDOT for off-system projects through the LOPP process.
- Assisted state and local partners with applications for the SUN Trail grant program.
- Completion of the Annual LOPP process for FY 2029 and FY 2030 (2023, 2024).
- Published the annual listing of federally-funded obligated projects in the TIP for Federal Fiscal Years (FFY) 2022, 2023.

Required Activities

The Task 4 activities planned for FY 2024/25 and FY 2025/26, including end products and completion dates are as follows.

Activity	End Product(s)	Completion Date(s)
*Prepare annual TIP, including the planning document, project database, online mapping, public and partner participation/review process	FY 2026 to 2030 TIP FY 2027 to 2031 TIP	June 2025 June 2026
Updates, modifications, amendments to TIP documents and online interactive maps	Updated TIP, online maps	June 2025, 2026, Ongoing
Annual Listing of Federally Obligated projects	Annual Obligation Report in TIP	June 2025 June 2026
Annual Roll Forward TIP Amendment	Roll Forward Amendment	September 2024, 2025
Completion and updates to annual List of Priority Projects (LOPP) process and project lists	LOPP Priority Lists	June 2025 June 2026
Assistance to local governments for LOPP project applications	LOPP Applications	June 2025 June 2026

*Consultant support (As identified in a Task Order, Scope of Work)

Responsible Agency

Ocala Marion TPO

Responsible Staff

Ocala Marion TPO, Consultants

Budget Summary

The estimated budgets for Task 4 are summarized in Tables 4A and 4B.

Table 4A: Task 4 Budget, FY 2024/2025

Task 4 Short-Range Planning, FY 2024/2025				
Budget Category	Funding Source Contract	FHWA PL G2W15	CTD	Total
A. Personnel				
Salaries and Benefits		\$ 39,379	\$ -	\$ 39,379
	Total:	\$ 39,379	\$ -	\$ 39,379
B. Consultant				
Consultants		\$ -	\$ -	\$ -
	Total:	\$ -	\$ -	\$ -
	Task Total:	\$ 39,379	\$ -	\$ 39,379

Task 4 includes \$6,000 of de-obligated FHWA PL funding. Available after October 1, 2024 with FHWA approval

Table 4B: Task 4 Budget, FY 2025/2026

Task 4 Short-Range Planning, FY 2025/2026				
Budget Category	Funding Source Contract	FHWA PL G2W15	CTD	Total
A. Personnel				
Salaries and Benefits		\$ 35,697	\$ -	\$ 35,697
	Total:	\$ 35,697	\$ -	\$ 35,697
B. Consultant				
Consultants		\$ -	\$ -	\$ -
	Total:	\$ -	\$ -	\$ -
	Task Total:	\$ 35,697	\$ -	\$ 35,697

TASK 5: PUBLIC TRANSPORTATION

Purpose

Staff support activities that assist the local public transportation system, which includes services provided by SunTran and Marion Transit (MT). SunTran operates fixed-route service on seven routes. MT provides door-to-door paratransit services as well as Americans with Disabilities Act (ADA) service within the fixed-route area of SunTran service. MT also serves as the designated Community Transportation Coordinator (CTC) through the Florida Commission for Transportation Disadvantaged (CTD).

Previous Work Completed

The completed public transportation planning activities of the TPO in FY 2022/23 and FY 2023/24.

- Provided staff support and administration to the Transportation Disadvantaged Local Coordinating Board (TDLCB), quarterly meetings and annual workshop.
- Conducted administration responsibilities for the Florida Commission for Transportation Disadvantaged grant (TD), including quarterly reports, invoices and financial statements.
- Conducted annual reviews of the CTC, Marion Transit (MT).
- Completed review and approval of the CTC Annual Operating Report (AOR).
- Reviewed CTC's Annual report.
- Completed two minor updates to the Transportation Disadvantaged Service Plan (TDSP) in 2023 and 2024.
- Completed updates/reviews of TDLCB Bylaws, Grievance Procedures and TD Service Plan revisions.
- Coordination with the CTD state grant program manager.
- Facilitated coordination between the TDLCB, CTC and MT.
- Coordination and project management for the Marion Transit Service Area Study.
- Conducted a brainstorming workshop for the TDLCB in 2023.
- Coordination with SunTran on support services.
- Coordination with SunTran for UPWP tasks and updates.
- Participation with SunTran in the transit route realignments and public meetings.
- Provided support to FDOT for FTA grant application reviews.

Required Activities

The Task 5 activities planned for FY 2024/25 and FY 2025/26, including end products and completion dates are on the next page.

Activity	End Product(s)	Completion Date(s)
Staff support and administration of the TDLCB	Meetings, packets, public notifications, minutes	Quarterly
Perform CTC annual evaluation process	Annual CTD Evaluation Report	March 2025, 2026
Financial tasks and maintain records for TD grant	Budget for UPWP and Marion Clerk of Court	Ongoing
Prepare and submit progress reports and invoices for TD grant	Invoices and progress reports	Quarterly
Meetings and coordination with CTC, CTD and SunTran	Meetings	Ongoing, As needed
Staff training for Transportation Disadvantaged	CTD Annual Conference and workshops	2024, 2025
Updates, Amendments to TDLCB Bylaws and Grievance Procedures	Updated documents	Ongoing, As needed
Review and approval of CTC Annual Operating Report (AOR)	AOR Review	2024, 2025
Conduct TD annual Public workshop	Public workshop meeting	2024, 2025
*Five-year major update to the TDSP, including data collection and analysis, plan development, public and partner agency outreach and coordination	TDSP Major Update	October 2025
Coordination and support for minor update to the TDSP	Annual update to TDSP	June 2026
Prepare and review Actual Expenditure Report (AER)	Annual Expenditure Report (AER)	August 2024 August 2025
Development of CTC Request for Proposals (RFP), selection and contracting process	New CTC Five-year contract	June 2025
Meetings, coordination, support to FDOT, SunTran and other public transit providers	Meetings, support services	As needed
Coordinate with SunTran for the Public Transportation Agency Safety Plan (PTASP) and required safety performance targets	PTASP targets and reporting in TIP	Annual
Coordination and support for public transportation in development of short-term and long-term planning needs for TPO area	Technical assistance, meetings, data and information gathering	As needed

*Consultant support (As identified in a Task Order, Scope of Work)

Responsible Agency

Ocala Marion TPO

Responsible Staff

Ocala Marion TPO, Consultants

Budget Summary

The estimated budget for Task 5 in FY 2022/23 and FY 2023/24 is summarized in Tables 5A and 5B.

Table 5A: Task 5 Budget, FY 2024/2025

Task 5 Public Transportation, FY 2024/2025			
Funding Source	FHWA PL G2W15	CTD	Total
Contract			
Budget Category			
A. Personnel			
Salaries and Benefits	\$ 4,599	\$ 26,264	\$ 30,863
Total:	\$ 4,599	\$ 26,264	\$ 30,863
B. Consultant			
Transportation Disadvantaged Service Plan	\$ 49,500	\$ -	\$ 49,500
Total:	\$ 49,500	\$ -	\$ 49,500
Task Total:	\$ 54,099	\$ 26,264	\$ 80,363

Task 5 includes \$45,000 of de-obligated FHWA PL funding. Available after October 1, 2024 with FHWA approval

Table 5B: Task 5 Budget, FY 2025/2026

Task 5 Public Transportation, FY 2025/2026			
Funding Source	FHWA PL G2W15	CTD	Total
Contract			
Budget Category			
A. Personnel			
Salaries and Benefits	\$ 4,808	\$ 26,220	\$ 31,028
Total:	\$ 4,808	\$ 26,220	\$ 31,028
B. Consultant			
Consultants	\$ -	\$ -	\$ -
Total:	\$ -	\$ -	\$ -
Task Total:	\$ 4,808	\$ 26,220	\$ 31,028

TASK 6: PUBLIC INVOLVEMENT

Purpose

Identifies all activities that involve the public in the TPO's '3C' transportation planning process. This includes information dissemination, review of federally required plans and programs, meetings, public hearings and workshops.

Previous Work Completed

The completed public transportation planning activities of the TPO in FY 2022/23 and FY 2023/24.

- Completed regular updates on the TPO website, including public notices for meetings, meeting agendas and minutes, meeting schedules and all federally required planning document reviews.
- Provided public notices for all meetings and workshops within seven (7) days to meet state Sunshine Law and PPP directives.
- Developed or updated information fact sheets and postcards for public education and awareness.
- Maintained Limited English Proficiency "I Speak Cards", and made available Public Comment cards for use in all TPO meetings.
- Maintained non-discrimination statements in English on all public meeting notices and agendas.
- Maintained non-discrimination statement in English and Spanish on the website.
- Maintained the TPO's Facebook and Twitter social media platforms.
- Regular Facebook and Twitter postings for meeting notices, community events, transportation information and publications.
- Maintained social media archive services.
- Title VI Plan update completed in January 2023.
- Public Participation Plan (PPP) update completed in March 2024.
- Maintained and updated TPO List of Acronyms publication.
- Hosted Mobility Week events in 2022 and 2023.
- Hosted a TPO-Community Traffic Safety Team Safety Summit in November 2023.
- Participated in community events, local government meetings and activities.
- Documented and responded to all public inquiries and requests for information.
- Developed a new Annual Report document template in 2022.
- Developed Annual Reports for 2022 and 2023.
- Maintained public website page for the Commitment to Zero Safety Action Plan.
- Conducted outreach to solicit interest and applications for the Citizens Advisory Committee (CAC).

Required Activities

The Task 6 activities planned for FY 2024/25 and FY 2025/26, including end products and completion dates are as follows.

Activity	End Product(s)	Completion Date(s)
*Enhance awareness and understanding of the TPO and the 3C planning process	Fact sheets, infographics, postcards, documents	Ongoing
Regular updates and maintenance to website	Up to date website	Ongoing
*Development of TPO website procurement, selection and contracting process	New TPO website and contract	January 2026
Develop Annual Report to highlight major activities, accomplishments	2024, 2025 Annual Reports	January 2025, 2026
Conduct social media outreach to gain input and feedback on planning activities	Routine postings on Facebook and Twitter	Weekly
Advertise all TPO meetings with 7-day notice to meet state Sunshine Law	Meeting notifications	Monthly, As required
Updates to Public Participation Plan (PPP)	Revised, Updated PPP	As needed
Updates to Title VI Plan	Revised Title VI Plan	As needed
Monitor and respond to all Title VI and ADA complaints	Formal response, documented report(s)	As needed, As required
Document and respond to all public inquiries and information requests	Formal responses, documented	Ongoing
Social media archive subscription renewals and ongoing file maintenance	Social Media archives subscription service	April 2025, 2026
Attend Title VI, ADA, DBE, Limited English Proficiency and public involvement training	Completed trainings	Ongoing, Annual
Outreach to attain membership for the Citizens Advisory Committee (CAC)	New members of the CAC	Ongoing
Participate in FDOT Mobility Week events	Serve as a local partner	2024, 2025
Updates to the Safety Action Plan regarding activities and information	Safety Action Plan webpage updates	Ongoing
Participate in transportation related community events and activities	Community events, meetings, workshops	Ongoing
Participate and offer technical support and information to the Marion County Safety Matters education and awareness video series	Technical support, data, information, ongoing participation	2024, 2025

*Consultant support (As identified in a Contract, Scope of Work)

Responsible Agency

Ocala Marion TPO

Responsible Staff

Ocala Marion TPO, Consultants

Budget Summary

The estimated budget for Task 6 in FY 2024/25 and FY 2025/26 is summarized in Tables 6A and 6B.

Table 6A: Task 6 Budget, FY 2024/2025

Task 6 Public Involvement, FY 2024/2025			
Funding Source	FHWA PL G2W15	CTD	Total
Contract			
Budget Category			
A. Personnel			
Salaries and Benefits	\$ 38,093	\$ -	\$ 38,093
Total:	\$ 38,093	\$ -	\$ 38,093
B. Consultant			
Consultants	\$ -	\$ -	\$ -
Website Maintenance and Hosting	\$ 4,040	\$ -	\$ 4,040
Total:	\$ 4,040	\$ -	\$ 4,040
Task Total:	\$ 42,133	\$ -	\$ 42,133

Table 6B: Task 6 Budget, FY 2025/2026

Task 6 Public Involvement, FY 2025/2026			
Funding Source	FHWA PL G2W15	CTD	Total
Contract			
Budget Category			
A. Personnel			
Salaries and Benefits	\$ 31,390	\$ -	\$ 31,390
Total:	\$ 31,390	\$ -	\$ 31,390
B. Consultant			
New Website	\$ 40,000	\$ -	\$ 40,000
Website Maintenance and Hosting	\$ 4,040	\$ -	\$ 4,040
Total:	\$ 44,040	\$ -	\$ 44,040
Task Total:	\$ 75,430	\$ -	\$ 75,430

TASK 7: SPECIAL PROJECTS

Purpose

Identifies special projects and activities that are non-recurring, such as planning studies and research in support of federal and state emphasis areas and TPO priorities.

Previous Work Completed

The completed special project planning activities of the TPO in FY 2022/23 and FY 2023/24.

- Completed the Marion Transit Service Area Study in June 2023.
- Completed the Commitment to Zero Online Dashboard and Annual Safety Report in August 2023.
- Completed the CMP State of the System Update in August 2023.
- Development of task work orders, scheduling and procurement process for Marion Transit Service Area Study, Commitment to Zero Dashboard and Annual Report and CMP State of System projects.

Required Activities

The Task 7 activities planned for FY 2024/25 and FY 2025/26, including end products and completion dates are as follows.

Activity	End Product(s)	Completion Date(s)
*Completion of an Active Transportation Plan for non-motorized transportation, in support of bicyclists, pedestrians, trails, complete streets and equestrians. Project includes data collection and analysis, plan development, public/partner review process, and listing of project improvements. A study of the economic, community, health benefits of active transportation, and level of traffic stress will be included in the plan	Active Transportation Plan with economic, community, health benefits study, level of stress for cyclists and pedestrians	October 2025
*Implementation of Commitment to Zero safety activities, online interactive map dashboard, HIN and Action Plan updates, project list updates, education/awareness and strategy implementation, annual safety report	Commitment to Zero Online Dashboard, Annual Report, Action Plan Update, Education	August 2024, 2025
*Transportation Resiliency planning, including additional technical tools, master planning, data/information gathering, education and grant support for projects	Transportation resiliency planning	Ongoing, as needed and identified

*Consultant support (As identified in a Task Order, Scope of Work)

Responsible Agency

Ocala Marion TPO

Responsible Staff

Ocala Marion TPO, Consultants

Budget Summary

The estimated budget for Task 7 in FY 2024/25 and FY 2025/26 is summarized in Tables 7A and 7B.

Table 7A: Task 7 Budget, FY 2024/2025

Task 7 Special Projects, FY 2024/2025			
Funding Source	FHWA PL G2W15	CTD	Total
Contract			
Budget Category			
A. Personnel			
Salaries and Benefits	\$ 53,868	\$ -	\$ 53,868
Total:	\$ 53,868	\$ -	\$ 53,868
B. Consultant			
Active Transportation Plan	\$ 121,690	\$ -	\$ 121,690
Consultants	\$ 24,310	\$ -	\$ 24,310
Total:	\$ 146,000	\$ -	\$ 146,000
Task Total:	\$ 199,868	\$ -	\$ 199,868

Task 7 includes \$146,000 of de-obligated FHWA PL funding. Available after October 1, 2024 with FHWA approval. These funds meet the requirements for the 2.5% PL set aside for Complete Streets planning [§ 11206(b)]. The total amount of funds used for Complete Streets planning for FY 24/25 is \$151,558 of \$1,128,631 PL. 2.5% of the total PL allocation for FY 24/25 is \$28,216.

Table 7B: Task 7 Budget, FY 2025/2026

Task 7 Special Projects, FY 2025/2026			
Funding Source	FHWA PL G2W15	CTD	Total
Contract			
Budget Category			
A. Personnel			
Salaries and Benefits	\$ 20,451	\$ -	\$ 20,451
Total:	\$ 20,451	\$ -	\$ 20,451
B. Consultant			
Active Transportation Plan	\$ 5,000	\$ -	\$ 5,000
Consultants	\$ -	\$ -	\$ -
Total:	\$ 5,000	\$ -	\$ 5,000
Task Total:	\$ 25,451	\$ -	\$ 25,451

These funds meet the requirements for the 2.5% PL set aside for Complete Streets planning [§ 11206(b)]. The total amount of funds used for Complete Streets planning for FY 25/26 is \$17,100 of \$682,743 PL or 2.5%.

TASK 8: REGIONAL ACTIVITIES

Purpose

To promote and enhance interregional transportation planning and coordination with neighboring MPOs by supporting common interests through the Central Florida MPO Alliance (CFMPOA). Participating MPOs/TPOs include: Lake~Sumter MPO, MetroPlan Orlando, Ocala Marion TPO, Polk TPO, River to Sea TPO and Space Coast TPO.

Previous Work:

Previous Work	Adoption Date/Status
Transfer to MetroPlan Orlando, financial support to administer CFMPO Alliance	Annual
CFMPOA Regional priority project list	Annual
CFMPOA Quarterly meetings	Quarterly
CFMPOA annual joint meeting with Sun Coast Transportation Planning Alliance (SCTPA)	Annual

Required Activities:

Required Activities and Work Products	Milestone/Completion Date
Transfer to MetroPlan Orlando, financial support to administer CFMPO Alliance	July 2024 July 2025
CFMPOA Regional Priority Project List	July 2024 July 2025
CFMPOA Regional Indicators Report	April 2024 April 2025
CFMPOA continued coordination amongst regional MPO partners	Quarterly meetings/Ongoing
CFMPOA Regional LRTP Summary	April 2026

Responsible Agencies:

Participating agencies of CFMPOA include Lake-Sumter MPO, MetroPlan Orlando, Ocala-Marion TPO, Polk TPO, River to Sea TPO, and Space Coast TPO

Budget Tables:

The estimated budget for Task 8 in FY 2024/25 and FY 2025/26 is summarized in Tables 8A and 8B on the next page.

Table 8A: Task 8 Budget, FY 2024/25

Task 8 Regional Activities		
Budget Detail for FY 25 (July 1, 2024 - June 30, 2025)		
Funding Source	FHWA (CPG)	Total
Contract Number	G2W15	
Source Level	Federal (81.93%)	
Consultant		
Transfer to: MetroPlan Orlando Annual Allocation for CFMPO Alliance*	\$ 5,000	\$ 5,000
TOTAL	\$ 5,000	\$ 5,000

* Central Florida Metropolitan Planning Organization Alliance. CFMPO Alliance members include: Metroplan Orlando, River to Sea TPO, Space Coast TPO, Lake-Sumter MPO, Ocala-Marion MPO and Polk TPO.



 Orange formatting indicates outgoing funds.

Table 8B: Task 8 Budget, FY 2025/26

Task 8 Regional Activities		
Budget Detail for FY 26 (July 1, 2025 - June 30, 2026)		
Funding Source	FHWA (CPG)	Total
Contract Number	G2W15	
Source Level	Federal (81.93%)	
Consultant		
Transfer to: MetroPlan Orlando Annual Allocation for CFMPO Alliance*	\$ 5,000	\$ 5,000
TOTAL	\$ 5,000	\$ 5,000

* Central Florida Metropolitan Planning Organization Alliance. CFMPO Alliance members include: Metroplan Orlando, River to Sea TPO, Space Coast TPO, Lake-Sumter MPO, Ocala-Marion MPO and Polk TPO.

 Orange formatting indicates outgoing funds.

TASK 9: LOCAL FUND

Purpose

Identifies activities and expenditures that are non-reimbursable from state and federal grant sources.

Previous Work Completed

Sources of local funds provided by the host agency Marion County supported the following activities in FY 2022/23 and FY 2023/24:

- Staff professional membership dues.

Required Activities

The activities planned for FY 2024/25 and FY 2026/26 that will be supported by local funding sources are as follows.

Activity	End Product(s)	Completion Date(s)
Staff professional membership dues	American Planning Association (APA), professional and grant memberships	Annual

Responsible Agency

Ocala Marion TPO

Responsible Staff

Ocala Marion TPO

Budget Summary

The estimated budget for Task 9 in FY 2024/25 and FY 2025/26 is summarized in Tables 9A and 9B.

Table 9A: Task 9 Budget, FY 2024/2025

Task 9 Local Fund, FY 2024/2025		
Funding Source	Local	Total
Budget Category		
D. Direct Expenses		
Professional Membership Dues	\$ 1,800	\$ 1,800
Total:	\$ 1,800	\$ 1,800
Task Total:	\$ 1,800	\$ 1,800

Table 9B: Task 9 Budget, FY 2025/2026

Task 9 Local Fund, FY 2025/2026		
Funding Source	Local	Total
Budget Category		
D. Direct Expenses		
Professional Membership Dues	\$ 1,800	\$ 1,800
Total:	\$ 1,800	\$ 1,800
Task Total:	\$ 1,800	\$ 1,800

FINANCIAL SUMMARY TABLES

Table 10A: Funding Sources Summary, FY 2024/2025

Funding Sources, FY 2024/2025					
Funding Source Source Level Contract Number UPWP Task	Federal FHWA PL	^State Soft Match (18.07%)	State CTD xxxxx	Local	Total (minus soft match)
1. Administration	\$ 361,503	\$ 65,324	\$ 4,471	\$ -	\$ 365,974
2. Data Collection	\$ 22,162	\$ 4,005	\$ -	\$ -	\$ 22,162
3. Long-Range Planning	\$ 404,487	\$ 73,091	\$ -	\$ -	\$ 404,487
4. Short-Range Planning	\$ 39,379	\$ 7,116	\$ -	\$ -	\$ 39,379
5. Public Transportation	\$ 54,099	\$ 9,776	\$ 26,264	\$ -	\$ 80,363
6. Public Involvement	\$ 42,133	\$ 7,613	\$ -	\$ -	\$ 42,133
7. Special Projects	\$ 199,868	\$ 36,116	\$ -	\$ -	\$ 199,868
*8. Regional Planning	\$ 5,000	\$ 904	\$ -	\$ -	\$ 5,000
9. Local Fund	\$ -	\$ -	\$ -	\$ 1,800	\$ 1,800
TOTAL:	\$ 1,128,631	\$ 203,945	\$ 30,735	\$ 1,800	\$ 1,161,166

Table 10B: Agency Participation Summary, FY 2024/2025

Agency Participation, FY 2024/2025							
UPWP Task	FHWA	FDOT (Soft Match)	CTD	Local	Total (minus soft match)	MetroPlan Transfer (CFMPOA)	Consultant
1. Administration	\$ 361,503	\$ 65,324	\$ 4,471	\$ -	\$ 365,974	\$ -	\$ 1,000
2. Data Collection	\$ 22,162	\$ 4,005	\$ -	\$ -	\$ 22,162	\$ -	\$ -
3. Long-Range Planning	\$ 404,487	\$ 73,091	\$ -	\$ -	\$ 404,487	\$ -	\$ 330,000
4. Short-Range Planning	\$ 39,379	\$ 7,116	\$ -	\$ -	\$ 39,379	\$ -	\$ -
5. Public Transportation	\$ 54,099	\$ 9,776	\$ 26,264	\$ -	\$ 80,363	\$ -	\$ 49,500
6. Public Involvement	\$ 42,133	\$ 7,613	\$ -	\$ -	\$ 42,133	\$ -	\$ 4,040
7. Special Projects	\$ 199,868	\$ 36,116	\$ -	\$ -	\$ 199,868	\$ -	\$ 146,000
*8. Regional Planning	\$ 5,000	\$ 904	\$ -	\$ -	\$ 5,000	\$ 5,000	\$ -
9. Local Fund	\$ -	\$ -	\$ -	\$ 1,800	\$ 1,800	\$ -	\$ -
TOTAL:	\$ 1,128,631	\$ 203,945	\$ 30,735	\$ 1,800	\$ 1,161,166	\$ 5,000	\$ 530,540

*Orange formatting indicates outgoing funds

^All federal funding, including fund transfers, apply the required non-federal match (FDOT State Soft Match with Toll Revenue Credits)

#FHWA-PL De-Obligation funding of \$445,000 included in summary tables. Funding available after October 1, 2024.

Table 11A: Funding Sources Summary, FY 2025/2026

Funding Sources, FY 2025/2026					
Funding Source Source Level Contract Number	Federal FHWA PL G2W15	^State Soft Match (18.07%)	State CTD	Local	Total (minus soft match)
UPWP Task					
1. Administration	\$ 389,408	\$ 70,366	\$ 4,515	\$ -	\$ 393,923
2. Data Collection	\$ 21,018	\$ 3,798	\$ -	\$ -	\$ 21,018
3. Long-Range Planning	\$ 125,931	\$ 22,756	\$ -	\$ -	\$ 125,931
4. Short-Range Planning	\$ 35,697	\$ 6,450	\$ -	\$ -	\$ 35,697
5. Public Transportation	\$ 4,808	\$ 869	\$ 26,220	\$ -	\$ 31,028
6. Public Involvement	\$ 75,430	\$ 13,630	\$ -	\$ -	\$ 75,430
7. Special Projects	\$ 25,451	\$ 4,599	\$ -	\$ -	\$ 25,451
*8. Regional Planning	\$ 5,000	\$ 904	\$ -	\$ -	\$ 5,000
9. Local Fund	\$ -	\$ -	\$ -	\$ 1,800	\$ 1,800
TOTAL:	\$ 682,743	\$ 123,372	\$ 30,735	\$ 1,800	\$ 715,278

Table 11B: Agency Participation Summary, FY 2025/2026

Agency Participation, FY 2025/2026							
UPWP Task	FHWA	FDOT (Soft Match)	CTD	Local	Total (minus soft match)	MetroPlan Transfer (CFMPOA)	Consultant
1. Administration	\$ 389,408	\$ 70,366	\$ 4,515	\$ -	\$ 393,923	\$ -	\$ 1,500
2. Data Collection	\$ 21,018	\$ 3,798	\$ -	\$ -	\$ 21,018	\$ -	\$ -
3. Long-Range Planning	\$ 125,931	\$ 22,756	\$ -	\$ -	\$ 125,931	\$ -	\$ 80,500
4. Short-Range Planning	\$ 35,697	\$ 6,450	\$ -	\$ -	\$ 35,697	\$ -	\$ -
5. Public Transportation	\$ 4,808	\$ 869	\$ 26,220	\$ -	\$ 31,028	\$ -	\$ -
6. Public Involvement	\$ 75,430	\$ 13,630	\$ -	\$ -	\$ 75,430	\$ -	\$ 44,040
7. Special Projects	\$ 25,451	\$ 4,599	\$ -	\$ -	\$ 25,451	\$ -	\$ 5,000
*8. Regional Planning	\$ 5,000	\$ 904	\$ -	\$ -	\$ 5,000	\$ 5,000	\$ -
9. Local Fund	\$ -	\$ -	\$ -	\$ 1,800	\$ 1,800	\$ -	\$ -
TOTAL:	\$ 682,743	\$ 123,372	\$ 30,735	\$ 1,800	\$ 715,278	\$ 5,000	\$ 131,040

*Orange formatting indicates outgoing funds

^All federal funding, including fund transfers, apply the required non-federal match (FDOT State Soft Match with Toll Revenue Credits)

Table 12: Budget Summary by Category and Funding Source, FY 2024/2025

Summary by Category and Funding Source, FY 2024/2025				
Budget Category	Funding Sources			
	FHWA (CPG)	CTD	Local	Total
A. Personnel				
Salaries and Fringe Benefits	\$ 477,986	\$ 26,264	\$ -	\$ 504,250
Total:	\$ 477,986	\$ 26,264	\$ -	\$ 504,250
B. Consultant Services				
Consultants	\$ 200,540	\$ -	\$ -	\$ 200,540
2050 Long Range Transportation Plan	\$ 330,000	\$ -	\$ -	\$ 330,000
MetroPlan Orlando (CFMPO Alliance)	\$ 5,000	\$ -	\$ -	\$ 5,000
Total:	\$ 535,540	\$ -	\$ -	\$ 535,540
C. Travel				
Travel and Training	\$ 16,350	\$ 1,385	\$ -	\$ 17,735
Total:	\$ 16,350	\$ 1,385	\$ -	\$ 17,735
D. Direct Expenses				
Advertising	\$ 1,200	\$ 1,200	\$ -	\$ 2,400
Computer Equipment	\$ 7,500	\$ -	\$ -	\$ 7,500
Copier/Printer Rental	\$ 3,600	\$ -	\$ -	\$ 3,600
Insurance	\$ 3,500	\$ -	\$ -	\$ 3,500
Meeting Room Rental	\$ 2,000	\$ -	\$ -	\$ 2,000
Office Supplies	\$ 5,160	\$ 100	\$ -	\$ 5,260
Postage	\$ 100	\$ 25	\$ -	\$ 125
Printing and Binding	\$ 750	\$ -	\$ -	\$ 750
Professional Membership Dues	\$ -	\$ -	\$ 1,800	\$ 1,800
Softw. Licenses, Subscriptions, Cell Phone	\$ 18,000	\$ -	\$ -	\$ 18,000
Total:	\$ 39,310	\$ 1,325	\$ 1,800	\$ 42,435
E. Indirect Expenses				
Marion County Cost Allocation	\$ 56,945	\$ 1,761	\$ -	\$ 58,706
Total:	\$ 56,945	\$ 1,761	\$ -	\$ 58,706
Grand Total:				
	\$ 1,128,631	\$ 30,735	\$ 1,800	\$ 1,161,166

FHWA-PL De-Obligation funding of \$445,000 included in summary table. Funding available after October 1, 2024.

Table 13: Budget Summary by Category and Funding Source, FY 2025/2026

Summary by Category and Funding Source, FY 2025/2026				
Budget Category	Funding Sources			
	FHWA (CPG)	CTD	Local	Total
A. Personnel				
Salaries and Fringe Benefits	\$ 429,808	\$ 26,220	\$ -	\$ 456,028
Total:	\$ 429,808	\$ 26,220	\$ -	\$ 456,028
B. Consultant Services				
Consultants	\$ 81,040	\$ -	\$ -	\$ 81,040
2050 Long Range Transportation Plan	\$ 50,000	\$ -	\$ -	\$ 50,000
MetroPlan Orlando (CFMPO Alliance)	\$ 5,000	\$ -	\$ -	\$ 5,000
Total:	\$ 136,040	\$ -	\$ -	\$ 136,040
C. Travel				
Travel and Training	\$ 17,500	\$ 1,385	\$ -	\$ 18,885
Total:	\$ 17,500	\$ 1,385	\$ -	\$ 18,885
D. Direct Expenses				
Advertising	\$ 1,200	\$ 1,200	\$ -	\$ 2,400
Computer Equipment	\$ 7,500	\$ -	\$ -	\$ 7,500
Copier/Printer Rental	\$ 3,800	\$ -	\$ -	\$ 3,800
Insurance	\$ 3,800	\$ -	\$ -	\$ 3,800
Meeting Room Rental	\$ 2,000	\$ -	\$ -	\$ 2,000
Office Supplies	\$ 5,350	\$ 100	\$ -	\$ 5,450
Postage	\$ 100	\$ 25	\$ -	\$ 125
Printing and Binding	\$ 750	\$ -	\$ -	\$ 750
Professional Membership Dues	\$ -	\$ -	\$ 1,800	\$ 1,800
Softw. Licenses, Subscriptions, Cell Phone	\$ 16,500	\$ -	\$ -	\$ 16,500
Total:	\$ 41,000	\$ 1,325	\$ 1,800	\$ 44,125
E. Indirect Expenses				
Marion County Cost Allocation	\$ 58,395	\$ 1,805	\$ -	\$ 60,200
Total:	\$ 58,395	\$ 1,805	\$ -	\$ 60,200
Grand Total:				
	\$ 682,743	\$ 30,735	\$ 1,800	\$ 715,278

APPENDIX A: UPWP STATEMENTS AND ASSURANCES


FLORIDA DEPARTMENT OF TRANSPORTATION
UNIFIED PLANNING WORK PROGRAM (UPWP)
STATEMENTS AND ASSURANCES

525-010-08
POLICY PLANNING
05/18

DEBARMENT and SUSPENSION CERTIFICATION

As required by the USDOT regulation on Governmentwide Debarment and Suspension at 49 CFR 29.510

- (1) The Ocala/Marion County TPO hereby certifies to the best of its knowledge and belief, that it and its principals:
- (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;
 - (b) Have not, within a three-year period preceding this proposal, been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) transaction or contract under a public transaction, violation of federal or state antitrust statutes; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state or local) with commission of any of the offenses listed in paragraph (b) of this certification; and
 - (d) Have not, within a three-year period preceding this certification, had one or more public transactions (federal, state or local) terminated for cause or default.
- (2) The Ocala/Marion County TPO also hereby certifies that if, later, it becomes aware of any information contradicting the statements of paragraphs (a) through (d) above, it will promptly provide that information to the U.S.D.O.T.


Name: Kristen Dreyer
Title: TPO Chair

April 23, 2024
Date

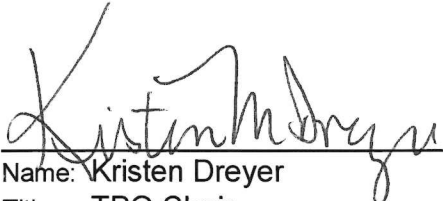
FLORIDA DEPARTMENT OF TRANSPORTATION
UNIFIED PLANNING WORK PROGRAM (UPWP)
STATEMENTS AND ASSURANCES

525-010-08
POLICY PLANNING
05/18

LOBBYING CERTIFICATION for GRANTS, LOANS and COOPERATIVE AGREEMENTS

In accordance with Section 1352 of Title 31, United States Code, it is the policy of the Ocala/Marion County TPO that:

- (1) No Federal or state appropriated funds have been paid or will be paid by or on behalf of the Ocala/Marion County TPO, to any person for influencing or attempting to influence an officer or employee of any Federal or state agency, or a member of Congress or the state legislature in connection with the awarding of any Federal or state contract, the making of any Federal or state grant, the making of any Federal or state loan, extension, continuation, renewal, amendment, or modification of any Federal or state contract, grant, loan, or cooperative 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 Federal 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 cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
- (3) The Ocala/Marion County TPO shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subgrants and contracts and subcontracts under grants, subgrants, loans, and cooperative agreement), which exceeds \$100,000, and that all such subrecipients shall certify and disclose accordingly.
- (4) 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 31, 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 failure.


Name: Kristen Dreyer
Title: TPO Chair

April 23, 2024
Date

FLORIDA DEPARTMENT OF TRANSPORTATION
UNIFIED PLANNING WORK PROGRAM (UPWP)
STATEMENTS AND ASSURANCES

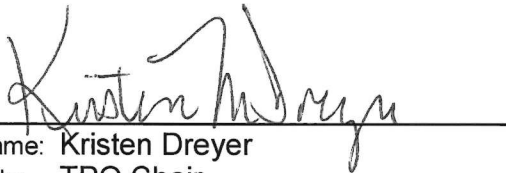
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POLICY PLANNING
05/18

DISADVANTAGED BUSINESS ENTERPRISE UTILIZATION

It is the policy of the Ocala/Marion County TPO that disadvantaged businesses, as defined by 49 Code of Federal Regulations, Part 26, shall have an opportunity to participate in the performance of MPO contracts in a nondiscriminatory environment. The objectives of the Disadvantaged Business Enterprise Program are to ensure non-discrimination in the award and administration of contracts, ensure firms fully meet eligibility standards, help remove barriers to participation, create a level playing field, assist in development of a firm so it can compete successfully outside of the program, provide flexibility, and ensure narrow tailoring of the program.

The Ocala/Marion County TPO, and its consultants shall take all necessary and reasonable steps to ensure that disadvantaged businesses have an opportunity to compete for and perform the contract work of the Ocala/Marion County TPO, in a non-discriminatory environment.

The Ocala/Marion County TPO shall require its consultants to not discriminate on the basis of race, color, national origin and sex in the award and performance of its contracts. This policy covers in part the applicable federal regulations and the applicable statutory references contained therein for the Disadvantaged Business Enterprise Program Plan, Chapters 337 and 339, Florida Statutes, and Rule Chapter 14-78, Florida Administrative Code



Name: Kristen Dreyer
Title: TPO Chair

April 23, 2024
Date

FLORIDA DEPARTMENT OF TRANSPORTATION
**UNIFIED PLANNING WORK PROGRAM (UPWP)
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525-010-08
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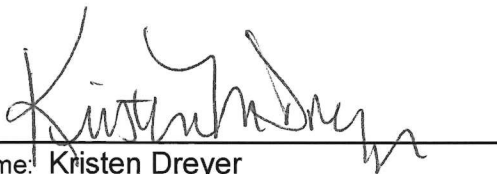
TITLE VI/ NONDISCRIMINATION ASSURANCE

Pursuant to Section 9 of US DOT Order 1050.2A, the Ocala/Marion County TPO assures the Florida Department of Transportation (FDOT) that no person shall on the basis of race, color, national origin, sex, age, disability, family or religious status, as provided by Title VI of the Civil Rights Act of 1964, the Civil Rights Restoration Act of 1987, the Florida Civil Rights Act of 1992 and other nondiscrimination authorities be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination or retaliation under any program or activity.

The Ocala/Marion County TPO further assures FDOT that it will undertake the following with respect to its programs and activities:

1. Designate a Title VI Liaison that has a responsible position within the organization and access to the Recipient's Chief Executive Officer.
2. Issue a policy statement signed by the Chief Executive Officer, which expresses its commitment to the nondiscrimination provisions of Title VI. The policy statement shall be circulated throughout the Recipient's organization and to the general public. Such information shall be published where appropriate in languages other than English.
3. Insert the clauses of *Appendices A and E* of this agreement in every contract subject to the Acts and the Regulations
4. Develop a complaint process and attempt to resolve complaints of discrimination against sub-recipients. Complaints against the Recipient shall immediately be forwarded to the FDOT District Title VI Coordinator.
5. Participate in training offered on Title VI and other nondiscrimination requirements.
6. If reviewed by FDOT or USDOT, take affirmative action to correct any deficiencies found within a reasonable time period, not to exceed ninety (90) calendar days.
7. Have a process to collect racial and ethnic data on persons impacted by your agency's programs.

THIS ASSURANCE is given in consideration of and for the purpose of obtaining any and all federal funds, grants, loans, contracts, properties, discounts or other federal financial assistance under all programs and activities and is binding. The person whose signature appears below is authorized to sign this assurance on behalf of the Recipient.



Name: Kristen Dreyer
Title: TPO Chair

April 23, 2024
Date

FLORIDA DEPARTMENT OF TRANSPORTATION
**UNIFIED PLANNING WORK PROGRAM (UPWP)
STATEMENTS AND ASSURANCES**

525-010-08
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APPENDICES A and E

During the performance of this contract, the contractor, for itself, its assignees and successors in interest (hereinafter referred to as the "Contractor") agrees as follows:

- (1) **Compliance with Regulations:** The Contractor shall comply with the Regulations relative to nondiscrimination in Federally-assisted programs of the U.S. Department of Transportation (hereinafter, "USDOT") Title 49, Code of Federal Regulations, Part 21, as they may be amended from time to time, (hereinafter referred to as the Regulations), which are herein incorporated by reference and made a part of this Agreement.
- (2) **Nondiscrimination:** The Contractor, with regard to the work performed during the contract, shall not discriminate on the basis of race, color, national origin, sex, age, disability, religion or family status in the selection and retention of subcontractors, including procurements of materials and leases of equipment. The Contractor shall not participate either directly or indirectly in the discrimination prohibited by section 21.5 of the Regulations, including employment practices when the contract covers a program set forth in Appendix B of the Regulations.
- (3) **Solicitations for Subcontractors, including Procurements of Materials and Equipment:** In all solicitations made by the Contractor, either by competitive bidding or negotiation for work to be performed under a subcontract, including procurements of materials or leases of equipment; each potential subcontractor or supplier shall be notified by the Contractor of the Contractor's obligations under this contract and the Regulations relative to nondiscrimination on the basis of race, color, national origin, sex, age, disability, religion or family status.
- (4) **Information and Reports:** The Contractor shall provide all information and reports required by the Regulations or directives issued pursuant thereto, and shall permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by the *Florida Department of Transportation*, the *Federal Highway Administration*, *Federal Transit Administration*, *Federal Aviation Administration*, and/or the *Federal Motor Carrier Safety Administration* to be pertinent to ascertain compliance with such Regulations, orders and instructions. Where any information required of a Contractor is in the exclusive possession of another who fails or refuses to furnish this information the Contractor shall so certify to the *Florida Department of Transportation*, the *Federal Highway Administration*, *Federal Transit Administration*, *Federal Aviation Administration*, and/or the *Federal Motor Carrier Safety Administration* as appropriate, and shall set forth what efforts it has made to obtain the information.
- (5) **Sanctions for Noncompliance:** In the event of the Contractor's noncompliance with the nondiscrimination provisions of this contract, the *Florida Department of Transportation* shall impose such contract sanctions as it or the *Federal Highway Administration*, *Federal Transit Administration*, *Federal Aviation Administration*, and/or the *Federal Motor Carrier Safety Administration* may determine to be appropriate, including, but not limited to:
 - a. Withholding of payments to the Contractor under the contract until the Contractor complies, and/or
 - b. Cancellation, termination or suspension of the contract, in whole or in part.

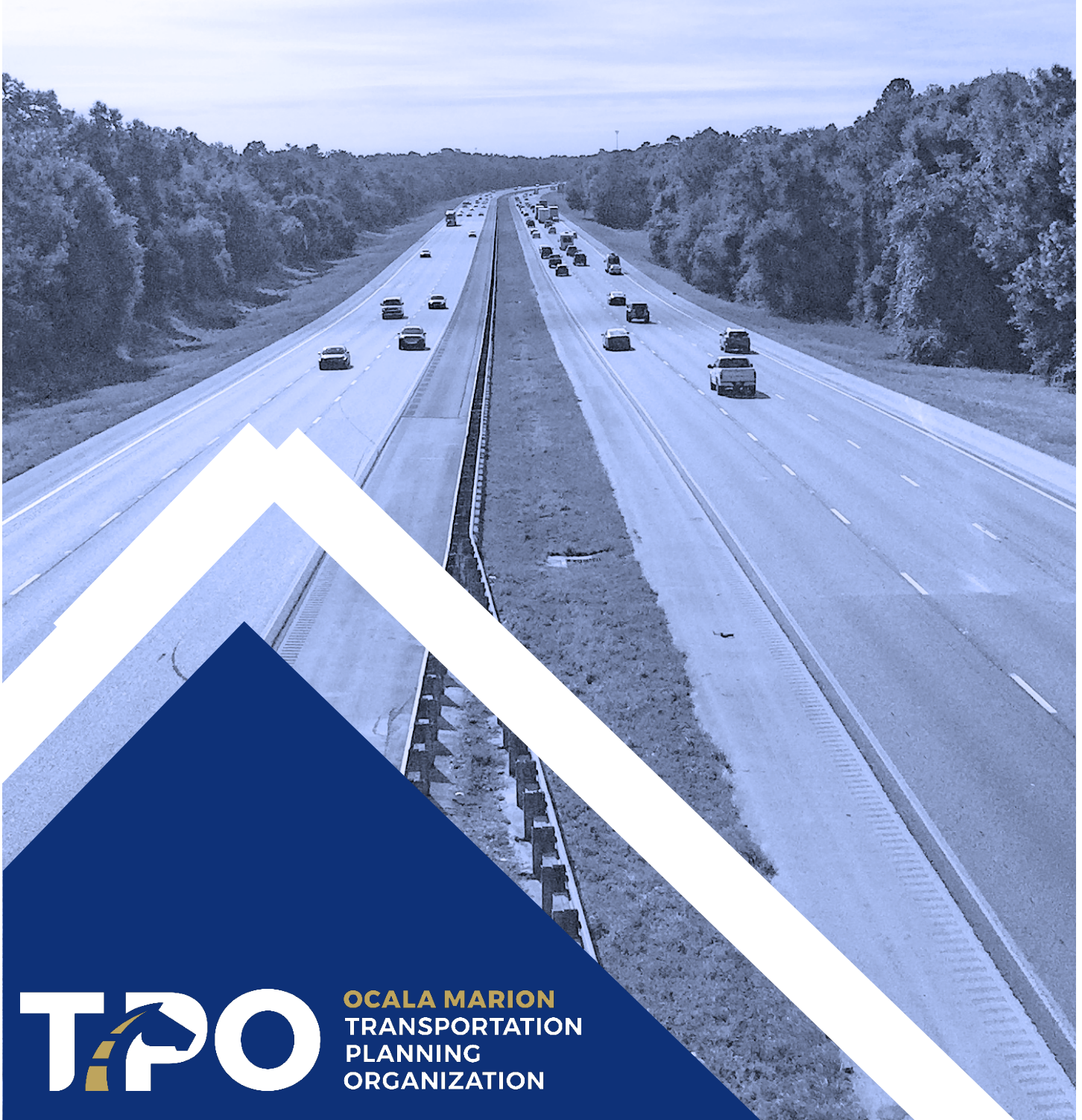
FLORIDA DEPARTMENT OF TRANSPORTATION
UNIFIED PLANNING WORK PROGRAM (UPWP)
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- (6) **Incorporation of Provisions:** The Contractor shall include the provisions of paragraphs (1) through (7) in every subcontract, including procurements of materials and leases of equipment, unless exempt by the Regulations, or directives issued pursuant thereto. The Contractor shall take such action with respect to any subcontract or procurement as the Florida Department of Transportation, the Federal Highway Administration, Federal Transit Administration, Federal Aviation Administration, and/or the Federal Motor Carrier Safety Administration may direct as a means of enforcing such provisions including sanctions for noncompliance. In the event a Contractor becomes involved in, or is threatened with, litigation with a subcontractor or supplier as a result of such direction, the Contractor may request the Florida Department of Transportation to enter into such litigation to protect the interests of the Florida Department of Transportation, and, in addition, the Contractor may request the United States to enter into such litigation to protect the interests of the United States.
- (7) **Compliance with Nondiscrimination Statutes and Authorities:** Title VI of the Civil Rights Act of 1964 (42 U.S.C. § 2000d et seq., 78 stat. 252), (prohibits discrimination on the basis of race, color, national origin); and 49 CFR Part 21; The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, (42 U.S.C. § 4601), (prohibits unfair treatment of persons displaced or whose property has been acquired because of Federal or Federal-aid programs and projects); Federal-Aid Highway Act of 1973, (23 U.S.C. § 324 et seq.), (prohibits discrimination on the basis of sex); Section 504 of the Rehabilitation Act of 1973, (29 U.S.C. § 794 et seq.), as amended, (prohibits discrimination on the basis of disability); and 49 CFR Part 27; The Age Discrimination Act of 1975, as amended, (42 U.S.C. § 6101 et seq.), (prohibits discrimination on the basis of age); Airport and Airway Improvement Act of 1982, (49 USC § 471, Section 47123), as amended, (prohibits discrimination based on race, creed, color, national origin, or sex); The Civil Rights Restoration Act of 1987, (PL 100-209), (Broadened the scope, coverage and applicability of Title VI of the Civil Rights Act of 1964, The Age Discrimination Act of 1975 and Section 504 of the Rehabilitation Act of 1973, by expanding the definition of the terms “programs or activities” to include all of the programs or activities of the Federal-aid recipients, sub-recipients and contractors, whether such programs or activities are Federally funded or not); Titles II and III of the Americans with Disabilities Act, which prohibit discrimination on the basis of disability in the operation of public entities, public and private transportation systems, places of public accommodation, and certain testing entities (42 U.S.C. §§ 12131 -- 12189) as implemented by Department of Transportation regulations at 49 C.F.R. parts 37 and 38; The Federal Aviation Administration’s Non-discrimination statute (49 U.S.C. § 47123) (prohibits discrimination on the basis of race, color, national origin, and sex); Executive Order 12898, Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations, which ensures non-discrimination against minority populations by discouraging programs, policies, and activities with disproportionately high and adverse human health or environmental effects on minority and low-income populations; Executive Order 13166, Improving Access to Services for Persons with Limited English Proficiency, and resulting agency guidance, national origin discrimination includes discrimination because of limited English proficiency (LEP). To ensure compliance with Title VI, you must take reasonable steps to ensure that LEP persons have meaningful access to your programs (70 Fed. Reg. at 74087 to 74100); Title IX of the Education Amendments of 1972, as amended, which prohibits you from discriminating because of sex in education programs or activities (20 U.S.C. 1681 et seq)

APPENDIX B: GLOSSARY OF TERMS AND ACRONYMS

Glossary of Terms and Acronyms



OCALA MARION
TRANSPORTATION
PLANNING
ORGANIZATION

November 2023

ACRYONYM	NAME	DESCRIPTION
3C	Continuing, Cooperative and Comprehensive	A Continuing, Cooperative and Comprehensive (3C) process is required for all Metropolitan Planning Organizations (MPO) to be eligible for Federal transportation funding.
AADT	Average Annual Daily Traffic	Average daily traffic on a roadway segment for all days of the week during a period of one year expressed in vehicles per day.
ACS	American Community Survey	The American Community Survey is an ongoing survey that provides vital information on a yearly basis about our nation and its people.
ADA	Americans with Disabilities Act	The Americans with Disabilities Act (ADA) prohibits discrimination against people with disabilities in employment, transportation, public accommodation, communications, and governmental activities.
ATMS	Automated Traffic Management System	ATMS is used to improve the efficiency of the transportation network. ATMS utilizes data-analysis and communication technology to reduce congestion in real-time due to crashes and other traffic problems.
BEA	Bureau of Economic Analysis	Federal agency within the Department of Commerce that provides economic data and projections.
BLS	Bureau of Labor Statistics	Federal agency within the Department of Labor that tracks federal employment data.
BTS	Bureau of Transportation Statistics	The Bureau of Transportation Statistics was established as a statistical agency in 1992. The Intermodal Surface Transportation Efficiency Act (ISTEA) of 1991 created BTS to administer data collection, analysis, and reporting and to ensure the most cost-effective use of transportation- monitoring resources.
CAAA	Clean Air Act Amendments of 1990	The original Clean Air Act was passed in 1963, but the national air pollution control program is actually based on the 1970 revision of the law. The Clean Air Act as amended in 1990 made major changes and contains the most far reaching revisions of the 1970 law.
CAC	Citizen Advisory Committee	The Citizens Advisory Committee (CAC) advises the TPO on local transportation issues based on the input of citizens they represent in the area. The TPO strives to keeps the composition of the CAC diverse in terms of geographic location and professions represented.
CBSA	Core Based Statistical Areas	CBSAs consist of the county or counties or equivalent entities associated with at least one core (urbanized area or urban cluster) of at least 10,000 population plus adjacent counties having a high degree of social and economic integration with the core. Social and economic integration is measured in the form of commuting and other reoccurring travel.
CFMPOA	Central Florida Metropolitan Planning Organization Alliance	A partnership of Transportation Planning Organizations in Central Florida created to provide transportation solutions throughout the region.
CFR	Code of Federal Regulations	The codification of the rules published in the Federal Register by the executive departments and agencies of the Federal Government. These are the administrative rules and regulations that clarify the impact of the United States Code (USC) or the law.

ACRYONYM	NAME	DESCRIPTION
CFRPM	Central Florida Regional Planning Model	Travel demand forecasting tool used by numerous planning agencies throughout central Florida.
CIP	Capital Improvement Program	The CIP is a multi-year schedule of programmed capital improvement projects, including cost estimates and budgeted by year. CIP documents are typically updated annually by a local government.
CMAQ	Congestion Mitigation and Air Quality Improvement Program	The CMAQ program funds transportation projects and programs in air quality non-attainment and maintenance areas that reduce traffic congestion and transportation related emissions (ozone, carbon monoxide, particulate matter, etc.).
CMP	Congestion Management Process	A systematic approach required in transportation management areas (TMAs) that provides for effective management and operation. Provides information on transportation system performance and finds alternative ways to alleviate congestion and enhance the mobility of people and goods, to levels that meet state and local needs.
COOP	Continuity of Operations Plan	The COOP outlines guidance to TPO Staff and Board Members to ensure all federal and state required essential functions continue to be performed in the event of an extended interruption of services due to a declared emergency or disaster.
CTC	Community Transportation Coordinator	Community Transportation Coordinators are businesses or county departments responsible for arrangement of transportation services delivered to the transportation disadvantaged. (Definition taken from Lee MPO - http://leempo.com/programs-products/transportation-disadvantaged/).
CTD	Commission for Transportation Disadvantaged	Created in 1989, the CTD was created to provide statewide policy guidance to Florida's Transportation Disadvantaged Program, which coordinates funds to provide older adults, persons with disabilities and people with limited access to employment, health care and educational opportunities (Definition taken from NCFRPC - http://www.ncfrpc.org/TD/td.html).
CTST	Community Traffic Safety Team	An organization created to inform the public about transportation safety issues. Major events conducted by the Marion County CTST include "Walk Your Child to School Day", a mock DUI scenario, and a Battle of the Belts competition.
DBE	Disadvantaged Business Enterprise	The DBE program ensures that federally-assisted contracts for transportation projects are made available for small businesses owned/ controlled by socially and economically disadvantaged individuals (Definition taken from FHWA - https://www.fhwa.dot.gov/civilrights/programs/dbe/).
DOPA	Designated Official Planning Agency	An agency that assists the Florida Commission for the Transportation Disadvantaged (CTD) in the coordination of safe, efficient, cost effective transportation services to those who are transportation disadvantaged. (Definition taken from CTD - https://ctd.fdot.gov/communitytransystem.htm)
DRI	Development of Regional Impact	A large-scale development project that may impact multiple counties or jurisdictions

ACRYONYM	NAME	DESCRIPTION
EIS	Environmental Impact Statement	Report developed as part of the National Environmental Policy Act requirements, which details any adverse economic, social, and environmental effects of a proposed transportation project for which Federal funding is part of the project.
EPA	Environmental Protection Agency	The federal regulatory agency responsible for administering and enforcing federal environmental laws, including the Clean Air Act, the Clean Water Act, the Endangered Species Act, and others.
ETDM	Efficient Transportation Decision Making	Developed by the Florida Department of Transportation (FDOT) to streamline the environmental review process, ETDM helps protect natural resources by involving stakeholders early in the transportation planning process. Specifically, ETDM is used to identify the impacts may occur from planned transportation projects.
FAA	Federal Aviation Administration	FAA provides a safe, secure, and efficient global aerospace system that contributes to national security and the promotion of US aerospace safety.
FAST Act	Fixing America's Surface Transportation Act	The Fixing America's Surface Transportation (FAST) Act is five-year legislation that was enacted into law on December 4, 2015. The main focus of the legislation is to improve the Nation's surface transportation infrastructure, including our roads, bridges, transit systems, and rail transportation network.
FDOT	Florida Department of Transportation	Originally named the Florida State Road Department, the Florida Department of Transportation (FDOT) was created in 1969. FDOT's mission is to ensure the mobility of people and goods, enhance economic prosperity, and preserve the quality of the environment and community (Definition taken from State of Florida- https://jobs.myflorida.com/go/Department-of-Transportation/2817700/).
FHWA	Federal Highway Administration	A branch of the U.S. Department of Transportation that administers the federal-aid highway program, providing financial assistance to states to construct and improve highways, urban and rural roads, and bridges.
FMTP	Freight Mobility and Trade Plan	FDOT's Freight Mobility and Trade Plan (FMTP) defines policies and investments that will enhance Florida's economic development into the future.
FSUTMS	Florida Standard Urban Transportation Modeling Structure	FSUTMS is a computerized planning model that allows users to better predict the impact of transportation policies and programs by providing a standardized framework for the development, use and sharing of models.
FTA	Federal Transit Administration	A branch of the U.S. Department of Transportation that administers federal funding to transportation authorities, local governments, and states to support a variety of locally planned, constructed, and operated public transportation systems throughout the U.S., including buses, subways, light rail, commuter rail, streetcars, monorail, passenger ferry boats, inclined railways, and people movers.
FTP	Florida Transportation Plan	Florida's long-range plan that guides current transportation decisions. The plan outlines transportation issues and solutions related to improving safety, efficiency, population growth, economic development, and access to transit and other modes of transportation.

ACRYONYM	NAME	DESCRIPTION
FY	Fiscal Year/ Federal Fiscal Year	The TPO's Fiscal Year is from July 1 to June 30. The Federal Fiscal Year is from October 1 to September 30.
GIS	Geographic Information System	Computerized data management system designed to capture, store, retrieve, analyze, and display geographically referenced information.
HOV	High-Occupancy Vehicle	Vehicles carrying two or more people.
HSIP	Highway Safety Improvement Program	The goal of the HSIP program is to achieve a significant reduction in traffic fatalities and serious injuries on all public roads, including non-State-owned public roads and roads on tribal lands.
HUD	Department of Housing and Urban Development	HUD's mission is to increase homeownership, support community development and increase access to affordable housing free from discrimination. HUD's Community Development Block Grant Program (CDBG) is a program with many resources that are used to help address a wide array of community development needs, including sidewalks and other transportation infrastructure.
IIJA	Infrastructure Investment and Jobs Act	Commonly referred to as the Bipartisan Infrastructure Bill, IIJA was signed into law by President Biden on November 15, 2021. IIJA includes \$550 billion in new funding for transportation infrastructure. IIJA authorizes \$1.2 trillion in total spending.
IRI	International Roughness Index	International Roughness Index (IRI) is used by transportation professionals around the world as a standard to quantify road surface roughness. IRI is highly useful for assessing overall roadway pavement ride quality; a higher IRI value indicates a rougher road surface.
ITS	Intelligent Transportation Systems	Electronics, photonics, communications, or information processing to improve the efficiency or safety of the surface transportation system.
LOS	Level of Service	Level of Service (LOS) is a term that describes the operating conditions a driver, transit users, bicyclist, or pedestrian will experience while traveling on a particular street, highway or transit vehicle. LOS is used in transportation planning as a data friendly tool to help aid in the decision making process regarding road capacity. LOS data allows planners to make more informed decisions regarding transportation projects.
LOPP	List of Priority Projects	The List of Priority Projects (LOPP) is a formalized list developed each year by the TPO in collaboration with local government partners, and as required by state statute. The LOPP contains the highest priorities for future transportation projects and investments to receive consideration for federal and state funding.
LRTP/MTP	Long-Range Transportation Plan (or Metropolitan Transportation Plan)	A document that serves as the defining vision for the region's transportation systems and services. The LRTP addresses a planning horizon of no less than a 20-years and is developed, adopted, and updated every five years by the TPO. The most recent LRTP was adopted in December 2015. The plan can be viewed on the TPO website at: https://ocalamariontpo.org/plans-and-programs/long-range-transportation-plan-lrtp/ .

ACRYONYM	NAME	DESCRIPTION
LOTTR	Level of Travel Time Reliability	The Level of Travel Time Reliability (LOTTR) is the ratio of the 80th percentile travel time to the normal travel time (50th percentile) throughout a full calendar year. Data for this measure is derived from the FHWA National Performance Management Research Data set (NPMRDS).
MAP-21	Moving Ahead for Progress in the 21st Century	The Moving Ahead for Progress in the 21st Century Act (P.L. 112-141), was signed into law in 2012. Funding surface transportation programs at over 105 billion for fiscal years (FY) 2013 and 2014, MAP-21 is the first long-term highway authorization enacted since 2005. MAP-21 creates a streamlined and performance-based surface transportation program and builds on many of the highway, transit, bike, and pedestrian programs and policies established in 1991.
MPA	Metropolitan Planning Area	The geographic area determined by agreement between the transportation planning organization (TPO) for the area and the Governor, in which the metropolitan transportation planning process is carried out.
MPO	Metropolitan Planning Organization	An MPO, also known as a TPO, is a forum for cooperative transportation decision-making for metropolitan planning areas. In order for a TPO to be designated as an MPO, an urban area must have a population of at least 50,000 as defined by the US Census Bureau.
MPOAC	Metropolitan Planning Organization Advisory Council	A planning and policy organization created to assist individual MPO/TPOs across Florida in building a more collaborative transportation planning process.
MSA	Metropolitan Statistical Area	A Core Based Statistical Areas associated with at least one urbanized area that has a population of at least 50,000. The metropolitan statistical area comprises the central county or counties or equivalent entities containing the core, plus adjacent outlying counties having a high degree of social and economic integration with the central county or counties as measured through commuting.
NTD	National Transit Database	The National Transit Database (NTD) is the repository of data for the financial, operating and asset conditions of the nation's transit systems.
NEPA	National Environmental Policy Act of 1969	Established requirements that any project using federal funding or requiring federal approval, including transportation projects, examine the effects of proposed and alternative choices on the environment before a federal decision is made.
NHPP	National Highway Performance Program	The NHPP provides support for the condition and performance of the National Highway System (NHS), for the construction of new facilities on the NHS.
NHPP (Bridge)	National Highway Performance Program (Bridge)	Reconstruction, resurfacing, restoration, rehabilitation, or preservation of a bridge on a non-NHS Federal-aid highway (if Interstate System and NHS Bridge Condition provision requirements are satisfied) [23 U.S.C. 119(i)].
NHS	National Highway System	This system of highways designated and approved in accordance with the provisions of 23 U.S.C. 103(b) (23CFR500).

ACRYONYM	NAME	DESCRIPTION
PD&E	Project Development and Environmental Study	A study conducted to determine feasible building alternatives for transportation projects and their social, economic and environmental impacts. PD&E studies are required per the National Environmental Policy Act (NEPA). (Definition taken from FDOT, District 7 - https://www.fdotd7studies.com/what-is-a-pde-study.html).
PEA	Planning Emphasis Area	Planning Emphasis Areas set planning priorities that are supportive of the statewide Florida Transportation Plan (FTP), and give importance to topics that all MPOs are encouraged to address in their respective planning programs.
PM	Performance Management	Performance Management (PM) serves as federally required strategic approach that uses system data and information guide investment and policies to achieve national goals.
PPP	Public Participation Plan	The Public Participation Plan documents the goals, objectives and strategies for ensuring all individuals have every opportunity to be involved in transportation planning decisions. The plan is designed to provide a transparent planning process that is free from any cultural, social, racial or economic barriers and offers multiple opportunities for public participation and input.
PTASP	Public Transportation Agency Safety Action Plan	A plan that is developed by transit agencies to identify responsibilities for safety and day to day implementation of a safety management system.
RPC	Regional Planning Council	Organizations designated by Florida law to provide planning and technical expertise to local governments in order to promote regional collaboration.
SHSP	Strategic Highway Safety Plan	This is a statewide and coordinated safety plan that provides a comprehensive framework for eliminating highway fatalities and reducing serious injuries on all public roads.
SIS	Strategic Intermodal System	A network of transportation facilities important to the state's economy and mobility. The SIS was created to focus the state's limited resources on the facilities most significant for interregional, interstate and international travel (Definition taken from FDOT - https://www.fdot.gov/planning/sis/default.shtm).
SOV	Single-Occupancy Vehicle	Any motor vehicle operated or driven by a single person.
STBG	Surface Transportation Block Grant Program	The STBG federal funding promotes flexibility in State and local transportation decisions and provides flexible funding to best address State and local transportation needs.
STIP	Statewide Transportation Improvement Program	The STIP is a statewide prioritized listing/program of transportation projects covering a period of four years that is consistent with the long-range statewide transportation plan, metropolitan transportation plans, and TIPs, and required for projects to be eligible for funding under title 23 U.S.C. and title 49 U.S.C. Chapter 53.
STP	Surface Transportation Program	Federal-aid highway funding program that supports a broad range of surface transportation capital needs, including many roads, transit, sea and airport access, vanpool, bike, and pedestrian facilities.

ACRYONYM	NAME	DESCRIPTION
TAC	Technical Advisory Committee	The Technical Advisory Committee provides technical expertise to the TPO by reviewing transportation plans, programs and projects primarily from a technical standpoint. The TAC is comprised of professional planners, engineers, and other state and local professionals.
TAMP	Transportation Asset Management Plan	The TAMP outlines the process for effectively operating, maintaining and improving the physical transportation assets in Florida (e.g., roads, bridges, culverts).
TAZ	Traffic Analysis Zone	A defined geographic area used to tabulate traffic-related land use data and forecast travel demand. Traffic Analysis Zones typically consist of one or more Census blocks/tracts or block groups.
TD	Transportation Disadvantaged	Transportation Disadvantaged includes individuals with physical and economic challenges and senior citizens facing mobility issues.
TDLCB	Transportation Disadvantaged Local Coordinating Board	The TDLCB coordinates transportation needs of the disadvantaged, including individuals with physical and economic challenges and senior citizens facing mobility issues. The Board helps the TPO identify local service needs of the Transportation Disadvantaged (TD) community to the Community Transportation Coordinator (CTC).
TDM	Transportation Demand Management	Programs designed to reduce demand for transportation through various means, such as the use of public transit and of alternative work hours.
TDP	Transit Development Plan	The Transit Development Plan (TDP) represents the community's vision for public transportation in the Ocala Marion TPO service area for a 10- year span. Updated every five years, the Plan provides a comprehensive assessment of transit services in Marion County. Specifically, the TDP details SunTran's transit and mobility needs, cost and revenue projections, and community transit goals, objectives, and policies.
TDSP	Transportation Disadvantaged Service Plan	The TDSP is a tactical plan outlining the services provided to the transportation disadvantaged population served by the Community Transportation Coordinator (Marion Transit). The TDSP is update every year, and also undergoes a major update every five years by the TPO.
TIP	Transportation Improvement Program	A TIP is a prioritized listing/program of transportation projects covering a period of five years that is developed and formally adopted by a TPO as part of the metropolitan transportation planning process, consistent with the metropolitan transportation plan, and required for projects to be eligible for funding under title 23 U.S.C. and title 49 U.S.C. Chapter 53.
TMA	Transportation Management Area	An urbanized area with a population over 200,000 (as determined by the latest decennial census) or other area when TMA designation is requested by the Governor and the TPO (or affected local officials), and officially designated by the Administrators of the FHWA and FTA. The TMA designation applies to the entire metropolitan planning area.
TMIP	Travel Model Improvement Program	TMIP supports and empowers planning agencies through leadership, innovation and support of planning analysis improvements to provide better information to support transportation and planning decisions.

ACRYONYM	NAME	DESCRIPTION
TOD	Transit Oriented Development	Transit-oriented development, or TOD, is a type of community development that includes a mixture of housing, office, retail and/or other amenities integrated into a walkable neighborhood and located within a half-mile of quality public transportation (Definition taken from Reconnecting America-www.reconnectingamerica.org).
TPM	Transportation Performance Management	FHWA defines Transportation Performance Management as a strategic approach that uses system information to make investment and policy decisions to achieve national performance goals.
TPO	Transportation Planning Organization	A TPO, also known as an MPO, is a forum for cooperative transportation decision-making for metropolitan planning areas. In order for a TPO to be designated, an urban area must have a population of at least 50,000 as defined by the US Census Bureau.
TRB	Transportation Research Board	The mission of the Transportation Research Board (TRB) is to promote innovation and progress in transportation through research.
TRIP	Transportation Regional Incentive Program	Created in 2005, the program provides state matching funds to improve regionally significant transportation facilities.
TTTR	Truck Travel Time Reliability Index	The Truck Travel Time Reliability Index (TTTR) is defined as the ratio of longer truck travel times (95th percentile) compared to normal truck travel times (50th percentile) on the interstate system.
UA	Urban Area	A statistical geographic entity delineated by the Census Bureau, consisting of densely settled census tracts and blocks and adjacent densely settled territory that together contain at least 50,000 people.
ULB	Useful Life Benchmark	The expected lifecycle or the acceptable period of use in service for a transit capital asset, as determined by the transit agency or by a default benchmark provided by the Federal Transit Administration.
UPWP	Unified Planning Work Program	UPWP means a Scope of Services identifying the planning priorities and activities to be carried out within a metropolitan planning area. At a minimum, a UPWP includes a description of planning work and resulting products, who will perform the work, time frames for completing the work, the cost of the work, and the source(s) of funds.
USC	United States Code	The codification by subject matter of the general and permanent laws of United States.
USDOT	United States Department of Transportation	When used alone, indicates the U.S. Department of Transportation. In conjunction with a place name, indicates state, city, or county transportation agency.
YOE	Year of Expenditure	The current dollar in the year (adjusted for inflation) during which an expenditure is made or benefit realized, such as a project being constructed.
VMT	Vehicle Miles Traveled	A measurement of miles traveled by vehicles within a specified region for a specified time period (Definition taken from Wikipedia).

APPENDIX C: PLANNING EMPHASIS AREAS



U.S. Department
of Transportation
**Federal Highway
Administration**

Office of the Administrator

1200 New Jersey Ave., SE
Washington, D.C. 20590

Federal Transit
Administration

December 30, 2021

Attention: FHWA Division Administrators
FTA Regional Administrators

Subject: 2021 Planning Emphasis Areas for use in the development of Metropolitan and Statewide Planning and Research Work programs.

With continued focus on transportation planning the Federal Highway Administration (FHWA) and the Federal Transit Administration (FTA) Offices of Planning are jointly issuing updated Planning Emphasis Areas (PEAs). The PEAs are areas that FHWA and FTA field offices should emphasize when meeting with the metropolitan planning organizations, State departments of transportation, Public Transportation Agencies, and Federal Land Management Agency counterparts to identify and develop tasks associated with the Unified Planning Work Program and the Statewide Planning and Research Program. We recognize the variability of work program development and update cycles, so we encourage field offices to incorporate these PEAs as programs are updated.

Please note that this letter is intended only to provide clarity regarding existing requirements. It is not binding and does not have the force and effect of law. All relevant statutes and regulations still apply.

Sincerely,

Nuria Fernandez
Administrator
Federal Transit Administration

Stephanie Pollack
Acting Administrator
Federal Highway Administration

Enclosure

2021 Planning Emphasis Areas:

Tackling the Climate Crisis – Transition to a Clean Energy, Resilient Future

Federal Highway Administration (FHWA) divisions and Federal Transit Administration (FTA) regional offices should work with State departments of transportation (State DOT), metropolitan planning organizations (MPO), and providers of public transportation to ensure that our transportation plans and infrastructure investments help achieve the national greenhouse gas reduction goals of 50-52 percent below 2005 levels by 2030, and net-zero emissions by 2050, and increase resilience to extreme weather events and other disasters resulting from the increasing effects of climate change. Field offices should encourage State DOTs and MPOs to use the transportation planning process to accelerate the transition toward electric and other alternative fueled vehicles, plan for a sustainable infrastructure system that works for all users, and undertake actions to prepare for and adapt to the impacts of climate change. Appropriate Unified Planning Work Program work tasks could include identifying the barriers to and opportunities for deployment of fueling and charging infrastructure; evaluating opportunities to reduce greenhouse gas emissions by reducing single-occupancy vehicle trips and increasing access to public transportation, shift to lower emission modes of transportation ; and identifying transportation system vulnerabilities to climate change impacts and evaluating potential solutions. We encourage you to visit FHWA’s [Sustainable Transportation](#) or FTA’s [Transit and Sustainability](#) Webpages for more information.

(See [EO 14008](#) on “Tackling the Climate Crisis at Home and Abroad,” [EO 13990](#) on “Protecting Public Health and the Environment and Restoring Science to Tackle the Climate Crisis.” [EO 14030](#) on “Climate-Related Financial Risk,” See also [FHWA Order 5520](#) “Transportation System Preparedness and Resilience to Extreme Weather Events,” FTA’s “[Hazard Mitigation Cost Effectiveness Tool](#),” FTA’s “[Emergency Relief Manual](#),” and “[TCRP Document 70: Improving the Resilience of Transit Systems Threatened by Natural Disasters](#)”)

Equity and Justice⁴⁰ in Transportation Planning

FHWA Division and FTA regional offices should work with State DOTs, MPOs, and providers of public transportation to advance racial equity and support for underserved and disadvantaged communities. This will help ensure public involvement in the planning process and that plans and strategies reflect various perspectives, concerns, and priorities from impacted areas. We encourage the use of strategies that: (1) improve infrastructure for non-motorized travel, public transportation access, and increased public transportation service in underserved communities; (2) plan for the safety of all road users, particularly those on arterials, through infrastructure improvements and advanced speed management; (3) reduce single-occupancy vehicle travel and associated air pollution in communities near high-volume corridors; (4) offer reduced public transportation fares as appropriate; (5) target demand-response service towards communities with higher concentrations of older adults and those with poor access to essential services; and (6) consider equitable and sustainable practices while developing transit-oriented development including affordable housing strategies and consideration of environmental justice populations.

[Executive Order 13985](#) (*Advancing Racial Equity and Support for Underserved Communities*) defines the term “equity” as the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment, such as Black, Latino, and Indigenous and Native American persons, Asian

Americans and Pacific Islanders and other persons of color; members of religious minorities; lesbian, gay, bisexual, transgender, and queer (LGBTQ+) persons; persons with disabilities; persons who live in rural areas; and persons otherwise adversely affected by persistent poverty or inequality. The term “underserved communities” refers to populations sharing a particular characteristic, as well as geographic communities, that have been systematically denied a full opportunity to participate in aspects of economic, social, and civic life, as exemplified by the list in the preceding definition of “equity.” In addition, [Executive Order 14008](#) and [M-21-28](#) provides a whole-of-government approach to advancing environmental justice by stating that 40 percent of Federal investments flow to disadvantaged communities. FHWA Division and FTA regional offices should work with State DOTs, MPOs, and providers of public transportation to review current and new metropolitan transportation plans to advance Federal investments to disadvantaged communities.

To accomplish both initiatives, our joint planning processes should support State and MPO goals for economic opportunity in disadvantaged communities that have been historically marginalized and overburdened by pollution and underinvestment in housing, transportation, water and wastewater infrastructure, recreation, and health care.

Complete Streets

FHWA Division and FTA regional offices should work with State DOTs, MPOs and providers of public transportation to review current policies, rules, and procedures to determine their impact on safety for all road users. This effort should work to include provisions for safety in future transportation infrastructure, particularly those outside automobiles.

A complete street is safe, and feels safe, for everyone using the street. FHWA and FTA seek to help Federal aid recipients plan, develop, and operate streets and networks that prioritize safety, comfort, and access to destinations for people who use the street network, including pedestrians, bicyclists, transit riders, micro-mobility users, freight delivery services, and motorists. The goal is to provide an equitable and safe transportation network for travelers of all ages and abilities, including those from marginalized communities facing historic disinvestment. This vision is not achieved through a one-size-fits-all solution – each complete street is unique and developed to best serve its community context and its primary role in the network.

Per the National Highway Traffic Safety Administration’s 2019 data, 62 percent of the motor vehicle crashes that resulted in pedestrian fatalities took place on arterials. Arterials tend to be designed for vehicle movement rather than mobility for non-motorized users and often lack convenient and safe crossing opportunities. They can function as barriers to a safe travel network for road users outside of vehicles.

To be considered complete, these roads should include safe pedestrian facilities, safe transit stops (if present), and safe crossing opportunities on an interval necessary for accessing destinations. A safe and complete network for bicycles can also be achieved through a safe and comfortable bicycle facility located on the roadway, adjacent to the road, or on a nearby parallel corridor. Jurisdictions will be encouraged to prioritize safety improvements and speed management on arterials that are essential to creating complete travel networks for those without access to single-occupancy vehicles.

Public Involvement

Early, effective, and continuous public involvement brings diverse viewpoints into the decisionmaking process. FHWA Division and FTA regional offices should encourage MPOs, State DOTs, and providers of public transportation to increase meaningful public involvement in transportation planning by integrating Virtual Public Involvement (VPI) tools into the overall public involvement approach while ensuring continued public participation by individuals without access to computers and mobile devices. The use of VPI broadens the reach of information to the public and makes participation more convenient and affordable to greater numbers of people. Virtual tools provide increased transparency and access to transportation planning activities and decisionmaking processes. Many virtual tools also provide information in visual and interactive formats that enhance public and stakeholder understanding of proposed plans, programs, and projects. Increasing participation earlier in the process can reduce project delays and lower staff time and costs. More information on VPI is available [here](#).

Strategic Highway Network (STRAHNET)/U.S. Department of Defense (DOD) Coordination

FHWA Division and FTA regional offices should encourage MPOs and State DOTs to coordinate with representatives from DOD in the transportation planning and project programming process on infrastructure and connectivity needs for STRAHNET routes and other public roads that connect to DOD facilities. According to the Declaration of Policy in 23 U.S.C. 101(b)(1), it is in the national interest to accelerate construction of the Federal-aid highway system, including the Dwight D. Eisenhower National System of Interstate and Defense Highways, because many of the highways (or portions of the highways) are inadequate to meet the needs of national and civil defense. The DOD's facilities include military bases, ports, and depots. The road networks that provide access and connections to these facilities are essential to national security. The [64,200-mile STRAHNET system](#) consists of public highways that provide access, continuity, and emergency transportation of personnel and equipment in times of peace and war. It includes the entire 48,482 miles of the Dwight D. Eisenhower National System of Interstate and Defense Highways and 14,000 miles of other non-Interstate public highways on the National Highway System. The STRAHNET also contains approximately 1,800 miles of connector routes linking more than 200 military installations and ports to the primary highway system. The DOD's facilities are also often major employers in a region, generating substantial volumes of commuter and freight traffic on the transportation network and around entry points to the military facilities. Stakeholders are encouraged to review the STRAHNET maps and recent Power Project Platform (PPP) [studies](#). These can be a useful resource in the State and MPO areas covered by these route analyses.

Federal Land Management Agency (FLMA) Coordination

FHWA Division and FTA regional offices should encourage MPOs and State DOTs to coordinate with FLMAs in the transportation planning and project programming process on infrastructure and connectivity needs related to access routes and other public roads and transportation services that connect to Federal lands. Through joint coordination, the State DOTs, MPOs, Tribal Governments, FLMAs, and local agencies should focus on integration of their transportation planning activities and develop cross-cutting State and MPO long range transportation plans, programs, and corridor studies, as well as the Office of Federal Lands

Highway's developed transportation plans and programs. Agencies should explore opportunities to leverage transportation funding to support access and transportation needs of FLMAs before transportation projects are programmed in the Transportation Improvement Program (TIP) and Statewide Transportation Improvement Program (STIP). Each State must consider the concerns of FLMAs that have jurisdiction over land within the boundaries of the State (23 CFR 450.208(a)(3)). MPOs must appropriately involve FLMAs in the development of the metropolitan transportation plan and the TIP (23 CFR 450.316(d)). Additionally, the Tribal Transportation Program, Federal Lands Transportation Program, and the Federal Lands Access Program TIPs must be included in the STIP, directly or by reference, after FHWA approval in accordance with 23 U.S.C. 201(c) (23 CFR 450.218(e)).

Planning and Environment Linkages (PEL)

FHWA Division and FTA regional offices should encourage State DOTs, MPOs and Public Transportation Agencies to implement PEL as part of the transportation planning and environmental review processes. The use of PEL is a collaborative and integrated approach to transportation decisionmaking that considers environmental, community, and economic goals early in the transportation planning process, and uses the information, analysis, and products developed during planning to inform the environmental review process. PEL leads to interagency relationship building among planning, resource, and regulatory agencies in the early stages of planning to inform and improve project delivery timeframes, including minimizing duplication and creating one cohesive flow of information. This results in transportation programs and projects that serve the community's transportation needs more effectively while avoiding and minimizing the impacts on human and natural resources. More information on PEL is available [here](#).

Data in Transportation Planning

To address the emerging topic areas of data sharing, needs, and analytics, FHWA Division and FTA regional offices should encourage State DOTs, MPOs, and providers of public transportation to incorporate data sharing and consideration into the transportation planning process, because data assets have value across multiple programs. Data sharing principles and data management can be used for a variety of issues, such as freight, bike and pedestrian planning, equity analyses, managing curb space, performance management, travel time reliability, connected and autonomous vehicles, mobility services, and safety. Developing and advancing data sharing principles allows for efficient use of resources and improved policy and decisionmaking at the State, MPO, regional, and local levels for all parties.

Florida Planning Emphasis Areas 2021

The Florida Department of Transportation (FDOT) Office of Policy Planning develops *Planning Emphasis Areas* on a two-year cycle in coordination with the development of metropolitan planning organizations' (MPOs) respective Unified Planning Work Programs (UPWPs). Emphasis areas set planning priorities, support the Florida Transportation Plan, and give importance to topic areas which MPOs are encouraged to address as they develop their planning programs. Implementation of the seven (7) goals of the Florida Transportation Plan requires embracing innovation; extensive collaboration across jurisdictions, modes and disciplines; an emphasis on customer service; data and performance feedback; and strategic investments for the efficient and effective allocation of resources.

Florida MPOs should consider emphasizing the following four (4) planning topics when updating their UPWPs.

Safety

The Florida Transportation Plan and the State's Strategic Highway Safety Plan place top priority on safety, with a state target of zero traffic fatalities and serious injuries. In addition to adopting safety targets, the MPOs must show how their Long Range Transportation Plan (LRTP) and priority projects in their Transportation Improvement Program (TIP) support progress toward those targets. The UPWP should consider enhancements to data analyses and community involvement to better inform the identification and prioritization of safety projects.

Equity

Executive Order 14008, [*Tackling the Climate Crisis at Home and Abroad*](#), created the "Justice40 Initiative" that aims to deliver 40 percent of the overall benefits of relevant federal investments to disadvantaged communities. This initiative supports Executive Order 13985, [*Advancing Racial Equity and Support for Underserved Communities Through the Federal Government*](#), outlines federal policy and defines equity as the consistent and systematic fair, just, and impartial treatment of individuals. The Florida Transportation Plan seeks transportation choices that improve accessibility and equity by including a key strategy to enhance affordable transportation, service, and information access options for all ages and abilities and throughout underserved communities. The MPOs are key to identifying and implementing improvements based on data-driven project prioritization that considers not only impacts of transportation projects on a community, but also benefits of projects that can enhance opportunities for a community. The UPWP should address approaches to furthering transportation equity.

Resilience

With the passage of the FAST Act, resilience was introduced as a federal planning factor: "Improve the resilience and reliability of the transportation system and mitigate stormwater impacts of surface transportation." Resilience is defined as the ability to adapt to changing



conditions and prepare for, withstand, and recover from disruption. These conditions can encompass a wide variety of environmental, technological, economic, or social impacts.

MPOs can address resilience within their planning processes by leveraging tools such as the *FHWA Resilience and Transportation Planning Guide* and the *FDOT Quick Guide: Incorporating Resilience* in the MPO LRTP. It should be noted that while these documents focus primarily on the development of MPO LRTPs and TIPs, addressing resilience should be a consideration within every planning document prepared by an MPO. MPOs should place a particular emphasis on coordination with agency partners responsible for natural disaster risk reduction, or who may be developing local resilience planning initiatives. Additionally, MPOs should consider the additional costs associated with reducing vulnerability of the existing transportation infrastructure. Proactive resiliency planning will help the MPO develop planning documents that are ultimately more realistic and cost-effective.

Emerging Mobility

Advances in communication and automation technology result in new mobility options, ranging from automated and connected transport, electric vehicles, ridesharing, and micro-mobility, to flying cars and space travel. These changes may be disruptive and transformational, with impacts to safety, vehicle ownership, travel capacity, vehicle miles traveled, land-use, transportation design, future investment demands, supply chain logistics, economy, and the workforce. Implementation of all seven goals of the Florida Transportation Plan can be furthered through both the transformation of major corridors and hubs and the expansion of transportation infrastructure to embrace and support the adoption of emerging mobility.

The UPWP should recognize the important influence of emerging mobility on the multi-modal transportation system and include related planning studies, collaboration efforts, research, or other activities.

Contact Information:

Abra Horne, FDOT, Metropolitan Planning Administrator

850-414-4901

Abra.Horne@dot.state.fl.us



Florida Department of Transportation
District Five

Planning Activities

FDOT Mission: The Florida Department of Transportation's (FDOT's) continuing mission is to provide a safe transportation system that ensures the mobility of people and goods, enhances economic prosperity, as well as preserves the quality of our environment and communities.

To achieve FDOT's mission and remain one of the top DOTs in the country, FDOT Secretary Jared W. Perdue implemented the FDOT compass: *safety* remains our true north with communities at the center of the five pillars: Safety, Resilience, Supply Chain, Technology, and Work Force Development. These core areas should be at the forefront of everything we do as we continue to serve the residents and visitors of District Five.

Communities: Florida's communities remain at the center of what we do. We prioritize meaningful community engagement to collaboratively identify the solutions that best support the needs and visions of all who live, work, and visit within our area. We achieve this through:

- Community visioning teams
- Community coalitions
- Strategic Safety Plan workshops
- Open houses and virtual public meetings
- Incorporating all modes of transportation into planning activities
- Funding intermodal studies and projects that integrate both transportation and land use

Safety: Safety is embedded in everything that we do at FDOT. Our goal is zero fatalities and serious injuries on all roadways. We work internally and externally to continue fostering a safety culture through input on projects, collaboration, and educational outreach. Part of the Vulnerable Road User Safety Assessment involves identifying priority strategies. FDOT supports the ultimate vision of zero fatalities and zero serious injuries by implementing Target Zero initiatives, such as those listed below. FDOT continues to collaborate with our partners to incorporate safety into the planning activities. Examples include:

- Corridor studies, bicycle and pedestrian plans and projects
- Transit plans and projects along with operational improvements
- Intersection and rail safety
- A "Complete Streets" approach to corridor planning and design
- Establish target speeds for corridors and projects
- Develop and maintain District safety plans
- State Highway Safety Plan
- Safety emphasis areas:



Florida Department of Transportation
District Five

- Aggressive driving, aging road users and teen drivers
- Distracted driving
- Crash data:
 - Impaired driving and intersection crashes
 - Lane departure crashes and vulnerable road users
 - Speed Management
- Separated bicycle and pedestrian facilities:
 - Continued expansion of trail networks
 - Improvements in safe access to transit facilities

Resilience: We remain focused on strengthening the resilience of our transportation system and our communities.

- FDOT developed the Resilience Action Plan (RAP), that examines the State Highway System and its vulnerabilities to flooding, storm surge, and other outside forces. This identifies areas where Florida can prioritize investments in infrastructure to improve resilience of the transportation system.
- FDOT will expand the RAP to include the National Highway System and other hazards.
- District Five has expedited several projects to implement long term solutions for protecting our coastal roadways.

Supply Chain: Freight activity in Florida is stronger than ever with increased e-commerce activity, increased manufacturing, and a strong Florida economy.

- District Five is taking steps to reduce unnecessary delays experienced in our multi-modal transportation system.
- FDOT continues to look for strategic investments that keep Florida's supply chain resilient, adaptive, and collaborative.

Technology: Technology and innovation remain front and center for Central Florida. We continue to attract emerging technologies to SunTrax, the premier testing facility which has made Florida the place to be when it comes to implementation and deployment of cutting-edge technology. Florida was the first state to roll out the work zone lane closure notification system that provides real time data feed to 3rd party providers on lane closures for construction projects.

- FDOT continues to look at how to better accommodate electric and connected vehicles (CAV) using the current infrastructure.
- Continue to advance Transportation Systems Management and Operations (TSM&O) strategies to get the most efficient use out of existing infrastructure.
- Several private companies are conducting advanced air mobility pilots in Florida which has the potential to change the way first/last mile delivery works across the industry.



Florida Department of Transportation
District Five

Workforce Development: Without a diverse and robust workforce, we cannot hope to achieve half of what we envision for the future of Florida. Workforce development is a priority for all sectors of our economy.

- Construction jobs have increased in Florida. Florida is one of 11 states offering multiple federal training and development programs for the transportation construction workforce.
- A skilled workforce is needed to deliver an efficient and effective transportation infrastructure and that's why FDOT works with elementary, middle, high schools, and universities to attract more talent to the transportation construction industry.
- FDOT is continually focused on developing and retaining the best workforce in the country.
- The FDOT Intern Program offers students an exciting insider's view of the transportation industry and an opportunity to develop skills and techniques directly applicable to their professional development.
- TSM&O personnel in Central Florida can take advantage of District Five's Focused Learning Education and Experiences or FLEX virtual training environment for instructor led and self-paced e-learning.

Additional Planning Activities: Central Florida's Metropolitan Planning Organizations (MPOs), Transportation Planning Organizations (TPOs), FDOT, and District Five partnerships will play a key role in driving regional collaboration and solutions.

- MPO and TPO Program Management:
 - Administration and monitoring of MPO/TPO program and federal planning funds.
 - District Liaison support for MPO/TPOs and local governments
 - Technical assistance for development and maintenance of MPO/TPO plans and documents: Unified Planning Work Program (UPWP), Long range Transportation Plan (LRTP), Transportation Improvement Plan (TIP) and Local Agreements
 - Annual Joint MPO/TPO Certification
- Regional Planning
 - Support and participate in an advisory role to regional boards and committees such as the East Central Florida Regional Planning Council (ECFRPC)
 - Freight and goods movement including additional parking facilities for trucks along our interstate highway system
 - Continued expansion of multimodal facilities to accommodate population growth as well as the increasing diversity of transportation modalities.
 - Coordinating with other districts and across MPO/TPO boundaries for regional project priorities
- Environmental Management:



Florida Department of Transportation
District Five

- Enhance Planning and Environmental Linkages (PEL)
- Efficient Transportation Decision Making (ETDM) process
- Planning consistency
- PD&E studies
- Modal Office – Transit:
 - Transit Development Plan (TDP)
 - Transit Asset Management
 - Transit Disadvantaged Service Plan (TDSP)
 - Programmatic audits and reviews
 - Transit vehicle inventory reviews
 - Fixed Guideway Oversight Program
 - Support to Transportation Disadvantaged Local Coordinating Boards
 - Transit audits and reviews and oversight
 - Fixed Guideway Oversight Program
 - Transportation Disadvantaged Local Coordinating Boards
- Growth Management
 - Review of Growth Management Documents (Comprehensive Plan Amendments, Developments of Regional Impacts and Proportionate Share Agreements).
 - Coordination of Road Jurisdiction Transfers (RJT's) for the district.
- Roadway Characteristics Inventory (RCI):
 - Documents the processes for establishing and managing the location of roadway assets and multimodal travel
 - Describes how RCI supports the business data requirements and users of the system
- Design Traffic Forecast
 - Develop and update traffic projections for state highway corridors and supporting regional roadways.
 - Traffic projections are necessary to support the road design for capacity and operational improvements and the pavement design for resurfacing.
- Federal Grant Coordination
 - Coordination of District Five Federal Grants applications
 - Coordination of Letters of Consistency
- Strategic Intermodal System
 - Management of the District's Strategic Intermodal System (SIS) Program; First Five, Second Five, the Cost Feasible Plan (CFP), and the Unfunded Needs list
 - Development of strategies and plans for implementing and maintaining SIS and SHS standards such as those for level of service, interchange spacing and access management.
 - Preparation of action plans, master plans, and others as identified.



Florida Department of Transportation
District Five

FDOT District Five will continue to foster a collaborative approach with our partners to yield comprehensive and forward-thinking transportation planning. Through strategic analysis, stakeholder engagement, and a commitment to sustainable and resilient transportation solutions, we will lay the groundwork for impactful initiatives that will enhance the mobility, safety, and accessibility throughout the state of Florida and our district. We remain dedicated to fostering innovation, inclusivity, and resilience in our transportation endeavors, ensuring that all our communities continue to thrive and prosper. We stand ready to address the evolving challenges and opportunities facing our state and district, while striving to create a transportation network that serves the needs of all residents, businesses, and visitors alike.

APPENDIX D: PUBLIC NOTICES AND PARTNER AGENCY COMMENTS



PRESS RELEASE

**FOR IMMEDIATE RELEASE
MARCH 14, 2024**

The Ocala Marion TPO Draft Fiscal Years 2025 to 2026 Unified Planning Work Program (UPWP) is available for public comment

The TPO's Unified Planning Work Program (UPWP) is a federally required financial budget document that outlines all activities and expenditures anticipated to occur over a two-year period from July 1, 2024 to June 30, 2026. The draft UPWP is available for public review by accessing the TPO's website:

<https://ocalamariontpo.org/plans-and-programs/unified-planning-work-plan-upwp>

To comment on the UPWP, please use the TPO's website, or contact staff by phone or email. Comments are accepted from March 14 to April 12, 2024.

<https://ocalamariontpo.org/contact-us/>

OcalaMarionTPO@marionfl.org

Rob Balmes

Ocala Marion TPO Director

rob.balmes@marionfl.org

352-438-2631

#

The Ocala Marion Transportation Planning Organization is a federally-mandated public agency responsible for allocating state and federal funds to roadway, freight, transit, bicycle and pedestrian projects within Marion County. The TPO serves the cities of Belleview, Dunnellon, Ocala and Marion County.

Draft Fiscal Years 2025 to 2026 Unified Planning Work Program (UPWP) is available for public comment. – Transportation Planning Organization



Website: ocalamariontpo.org

Unified Planning Work Program

Fiscal Years 2024/2025 and 2025/2026
(July 1, 2024 to June 30, 2026)

Mission

To plan for a future transportation system that is safe and accessible for the residents and visitors of our community.

Vision

A transportation system that supports growth, mobility, and safety through leadership and planning.

Pending Board Adoption on April 23, 2024

This document was prepared with financial assistance from the Federal Highway Administration and Federal Transit Administration of the U.S. Department of Transportation through the Florida Department of Transportation.
Federal Aid Project (FAP) Number: 0314-060-M; FDOT Financial Project Number (FPN): 439331-5

Catalog of Federal Domestic Assistance (CFDA) Numbers:
20.205 Highway Planning and Construction; 20.505 Federal Transit Technical Studies Grant (Metropolitan Planning)

2710 E. Silver Springs Boulevard • Ocala, FL 34470 • 352-438-2630

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To comment on the UPWP, please use the TPO's website, or contact staff by phone or email. Comments are accepted from March 14 to April 12, 2024.

<https://ocalamariontpo.org/contact-us/>

Rob Balmes
Ocala Marion TPO Director
rob.balmes@marionfl.org
352-438-2631



TO: Kia Powell, FDOT Liaison

FROM: Rob Balmes, Director *R.B.*

RE: Draft FY 2024/2025 to 2025/2026 UPWP for Review

DATE: March 14, 2024

The draft Ocala/Marion TPO Unified Planning Work Program (UPWP) for Fiscal Years 2025 and 2026 has been completed. The document was placed in the GAP Portal for review and comment.

The TPO's draft UPWP development process for this cycle is as follows:

- March 14 – Submission of draft UPWP to FDOT GAP Portal
- March 14 – Begin 30-day public review period of draft UPWP
- March 14 – Public advertisement notice on TPO website, social media post, and emails to partner agencies, including local government public information officers
- March 26 – Staff presentation of draft UPWP to TPO Board
- April 9 – Staff presentation of draft UPWP to TAC and CAC
- **April 12 – Deadline requested for comments from FDOT and local partners**
- April 16 – Final UPWP in TPO Board packet for April 23rd meeting
- April 23 – TPO Board final comments, public comments, and adoption
- May 1 – TPO submits adopted UPWP to FDOT GAP portal

The TPO looks forward to your review and comments. If you have any questions, please contact me at: 352-438-2631.



UNIFIED PLANNING WORK PROGRAM (UPWP) REVIEW CHECKLIST

MPO: **Ocala Marion**

UPWP Draft # or Date: **1**

Review #: **1**

Date of Review: **3/25/2024**

Reviewed By: **KP**

The following UPWP Review Checklist is provided to assist in the review of the MPO’s UPWP. This Review Checklist is to be completed by the MPO Liaison and included in the UPWP Appendix.

Comments should be categorized as:

Editorial: Comments may be addressed by MPO but would not affect approval of the document, i.e., grammatical, spelling, and other related errors.

Enhancement: Comments may be addressed by MPO but would not affect the approval of the document, i.e., improve the quality of the document and the understanding for the public (improving graphics, re-packaging of the document, use of plain language, reformatting for clarity, removing redundant language).

Critical: Comment MUST be addressed to meet minimum state and federal requirements to obtain approval. The reviewer must clearly identify the applicable state or federal policies, regulations, guidance, procedures, or statutes that the document does not conform with.

A space for comments for each section is provided at the bottom of each section.

UPWP Cover & Title Page

Does the cover or title page include the following information?

- MPO name, address, website? **Yes | If yes, page number: 1**
- CFDA number (FHWA – PL & SU: 20.205, FTA 5305: 20.505)? **Yes | If yes, page number: 1**
- Identification of agencies providing funds for the UPWP? **Yes | If yes, page number: 1**
- Financial Project Number (FPN) for each contract shown in UPWP? **Yes | If yes, page number: 1**
- Federal Award Identification Number (FAIN) for FHWA contracts (or the Federal Aid Project Number [FAP])? **Yes | If yes, page number: 1**
- Correct State Fiscal Years? **Yes | If yes, page number: 1**
- Statement of nondiscrimination? **Yes | If yes, page number 2**
- DRAFT UPWP: Space for adoption date and revision dates? **Yes | If yes, page number: 1**
- FINAL UPWP: Adoption date and space for revision dates? **Not Applicable | If yes, page number: xx**

No comment

Page numbers correspond with page # of pdf file provided

Required Content

Does the UPWP have the following information?

- Introduction? **Yes | If yes, page number: 3**

Unified Planning Work Program (UPWP)

Review Checklist

- Organization and Management? [Yes | If yes, page number: 6](#)
- UPWP Planning Task Pages? [Yes | If yes, page number: 18](#)
- Funding Source Budget Table and Summary Budget Table? [Yes | If yes, page number: 42](#)
- Definition of acronyms used in UPWP? [Yes | If yes, page number 53](#)
- District Planning Activities? [Yes | If yes, page number: 13](#)
- Indirect Rate Approval (if required)? [Yes | If yes, page number: 77](#)
 - Cost Allocation Plan and Certificate of Indirect Cost in an appendix? [Yes | If yes, page number: 77](#)
- the MPO must identify and include cost estimates for transportation planning, research, and technology transfer activities funded with other federal, state, or local funds being conducted within the MPO area (this includes planning and feasibility studies by other entities) (23 CFR 420.111(e)). [Not Applicable | If yes, page number: xx](#)
- DRAFT UPWP:
 - A place for the signed Resolution adopting the final UPWP? [Yes | If yes, page number 3](#)
 - A place for the draft Resolution to adopt Travel Policy if not using FDOT policy (if required)? [Yes | If yes, page number: 83](#)
 - A place for the Cost Analysis Certification Statement? [No | If yes, page number: xx](#)
 - A place for the FHWA Certifications and Assurances? [Yes | If yes, page number: 46](#)
- FINAL UPWP:
 - The signed Resolution adopting the UPWP? [Not Applicable | If yes, page number: xx](#)
 - The signed Resolution adopting the Travel Policy if not using FDOT policy (if required)? [Not Applicable | If yes, page number: xx](#)
 - The signed Cost Analysis Certification Statement? [Not Applicable | If yes, page number: xx](#)
 - The signed FHWA Certifications and Assurances? [Not Applicable | If yes, page number: xx](#)
 - UPWP Comments? [Not Applicable | If yes, page number: xx](#)
- Appendix to include items previously mentioned: Travel Policy (if required), Cost Allocation Plan and Certificate of Indirect Cost (if required), and UPWP Comments? [Yes | If yes, page number: 46](#)

Critical

Please add cost certification analysis to final document

Introduction

Does the introduction include the following elements?

- Definition and purpose of the UPWP? [Yes | If yes, page number: 5](#)
- Overview of MPO's comprehensive transportation planning activities? [Yes | If yes, page number: 9](#)
- Discussion of planning priorities, both MPO and local? [Yes | If yes, page number: 14](#)
- Statement of CPG participation: "The FDOT and the (insert organization name) participate in the Consolidated Planning Grant (CPG). The CPG enables FDOT, in cooperation with the MPO, FHWA, and FTA, to annually consolidate Florida's FHWA PL and FTA 5305(d) metropolitan planning fund allocations into a single grant that is administered by the FHWA Florida Division. These funds are annually apportioned to FDOT as the direct recipient and allocated to the MPO by FDOT utilizing formulas approved by the MPO, FDOT, FHWA, and FTA in accordance with 23 CFR 420.109 and 49, U.S.C. Chapter 53. The FDOT is fulfilling the CPG's required 18.07% non-federal share

Unified Planning Work Program (UPWP)

Review Checklist

(match) using Transportation Development Credits as permitted by 23 CFR 120(i) and FTA C 8100.1D". [Yes | If yes, page number: 5](#)

- Definition of the soft match: Section 120 of Title 23, U.S.C., permits a State to use certain toll revenue expenditures as a credit toward the non-Federal matching share of all programs authorized by Title 23 (except Emergency Relief Programs) and for transit programs authorized by Chapter 53 of Title 49, U.S.C. This is, in essence, a "soft-match" provision that allows the Federal share to be increased up to 100% to the extent credits are available. The "soft match" amount utilized to match the FHWA funding in the UPWP is 18.07% of FHWA program funds for a total of \$_____ ? [Yes | If yes, page number: 5](#)
- Description of the public involvement process used to develop the MPO's UPWP? [Yes](#) [No](#) [Page number: 6](#)
- Description of how the MPO addresses the [Federal Planning Factors](#) - (23 CFR 450.306(b)) – can be demonstrated using a matrix? [Yes | If yes, page number: 10](#)
- Description of how the MPO's UPWP addresses the [2021 Federal Planning Emphasis Areas](#)? [Select response | If yes, page number: xx](#)
- If MPO is not in attainment, description of transportation related air quality planning activities regardless of funding sources or agencies conducting activities? [Not Applicable | If yes, page number: xx](#)

[Choose a category](#)

[Click here to enter comments](#)

MPO Organization and Management

At a minimum, does the UPWP include information on the following items?

- Identification of participants and description of role in the UPWP planning process? [Yes | If yes, page number: 6](#)
- Discussion of agreements, including date executed:
 - Metropolitan Planning Agreement (FHWA funds)? [Yes | If yes, page number: 8](#)
 - Public Transportation Grant Agreements (prior year FTA funds)? [Yes | If yes, page number: 8](#)
 - Interlocal Agreement for the Creation (or Redesignation) of the Metropolitan Planning Organization? [Yes | If yes, page number: 8](#)
 - Intergovernmental Coordination and Review and Public Transportation Coordination Joint Participation Agreement (ICAR)? [Yes | If yes, page number: 8](#)
 - Memorandum of Understanding between MPOs or FDOT if transferring funds to accomplish Regional Activities? [Yes | If yes, page number: 8](#)
- Discussion and identification of operational procedures and bylaws including date executed:
 - Continuity of Operations (COOP): [Yes | If yes, page number: 8](#)
 - MPO Bylaws: [Yes | If yes, page number: 6](#)
- Does the MPO include the following SIGNED Certifications and Assurances section?
 - Disadvantaged Business Enterprise Utilization? [Yes | If yes, page number: 49](#)
 - Debarment and Suspension Certification? [Yes | If yes, page number: 47](#)
 - Lobbying Certification for Grants, Loans, and Cooperative Agreements? [Yes | If yes, page number: 48](#)
 - Title VI/Nondiscrimination Assurances? [Yes | If yes, page number: 50](#)

Unified Planning Work Program (UPWP)

Review Checklist

- Appendices A and E? [Yes | If yes, page number: 51](#)
- Discussion of Indirect Rate Plan, and, in an appendix, inclusion of the signed Cost Allocation Plan and Certificate of Indirect Cost, if applicable. [Yes | If yes, page number: 8](#)

[Choose a category](#)

[Click here to enter comments](#)

Work Elements/Tasks Sheets

At a minimum, does the UPWP have the following distinct tasks or subtasks?

- MPO Administration? [Yes | If yes, page number: 18](#)
- Transportation Improvement Program (TIP)? [Yes | If yes, page number: 28](#)
- Long Range Transportation Plan (LRTP)? [Yes | If yes, page number: 25](#)
- MPO Regional Activities Task (if required)? [Yes | If yes, page number: 38](#)

[Choose a category](#)

[Click here to enter comments](#)

Do each of the Work Element/Task Summary Pages include the following?

- Is each Task Sheet named and numbered? [Yes](#)
- Does each Task Sheet include Purpose, Previous Work, and Required Activities? [Yes](#)
- Do the required activities list who will be completing the work? [Yes](#)
- Does each Task Sheet indicate who the responsible agency or agencies are? [Yes](#)
- Does each Task Sheet include end products/deliverables with a description of the scope and estimated completion date? [Yes](#)
- Does the supporting narrative for each task provide sufficient detail to determine the eligibility, necessity, and reasonableness of the purchase? [Yes](#)
- If memberships are listed as an expense, does it state that the memberships are for organizational memberships, not individual memberships? [Select response | If yes, page number: xx](#)

[Editorial](#)

NOTE: memberships paid for using local funds

Work Elements/Tasks Sheets Budget Tables

Did the MPO use the latest UPWP Budget Table template provided by the Central Office for task budget tables, which includes a location to show do-obligated funds? [No](#)

If the MPO did not use the latest UPWP Budget Table template, did the MPO show de-obligated funds by source somewhere else in the UPWP? [No](#)

Did the MPO prepare Task Summary Budget tables for Year 1 and Year 2 (either individually or combined)? [Yes | If yes, page number: 43](#)

Does MPO **Administration Task** have a subcategory for:

- Personnel Services? [Yes | If yes, page number: 20](#)

Unified Planning Work Program (UPWP)

Review Checklist

- Equipment? Equipment costing more than \$5,000 per item should be listed separately. [Select response | If yes, page number: xx](#)
- Travel? [Yes | If yes, page number: 20](#)
- Supplies? Supplies costing more than \$1,000 per item should be listed separately. [Select response | If yes, page number: xx](#)
- Direct Expenses? [Select response | If yes, page number: 20](#)
- Indirect Expenses (only required if MPO has an approved indirect rate)? [Yes | If yes, page number: 20](#)
- Are Atypical expenses (see [Guide for UPWP Development](#)) clearly described? [Select response | If yes, page number: xx](#)
- Is Annual Audit expense included, if required? [Yes | If yes, page number: 21](#)

Do each of the other Work Element/Task Summary **Estimated Budget Tables** include the following?

- Personnel Services? [Yes](#)
- Consultant Services (if using consultant on task)? [Yes](#)
- Travel (if needed)? [Yes](#)
- Direct Expenses (if needed)? [Not Applicable](#)
- Indirect Expenses (only required if MPO has an approved indirect rate)? [Yes](#)
- Supplies (if needed)? [Yes](#)
- Equipment (if needed)? [Yes](#)

[No comment](#)

[Click here to enter comments](#)

MPO Regional Activities Task (required if MPO is transferring funds between MPOs and/or FDOT to complete regional planning activities)

Does the MPO have distinct tables to reflect MPO funding and overall regional task funding? In the UPWP Budget Table template provided by the Central Office, these tables are called MPO Regional Activities and All Regional Accounting. [Yes | If yes, page number: 39](#)

Do the Regional Work Element/Task Budget Table(s):

- Show ALL agencies (e.g., other MPOs, FDOT) included in the regional activities? [Yes | If yes, page number: 38](#)
- Show amounts to be transferred by the MPO to other agencies (if applicable)? [Yes | If yes, page number: 39](#)
- Show amounts to be received by the MPO from other agencies (if applicable)? [Not Applicable | If yes, page number: xx](#)
- Show activities the funds are being used for? [Yes | If yes, page number: 38](#)
- Do all participating MPOs use identical:
 - Descriptions of the activities to be completed [No | If yes, page number: Click or tap here to enter text.](#)
 - Task name, activity description(s), and budgeted funds [No | If yes, page number:](#)

Critical

Please revise task to reflect exact same language as other regional MPO partners

Unified Planning Work Program (UPWP)

Review Checklist

Funding Source Budget Table

Did the MPO use the UPWP Budget Table template provided by the Central Office for Funding Source Budget Table?

Yes

Total Year 1 contract amounts:

- DRAFT UPWP:
 - PL funds, which include Year 1 FTA 5305(d) and Year 1 PL funds (refer to Chris Bratton’s PL Spreadsheet **total should not include estimated amount to be de-obligated from the previous FY**)? [Yes](#) | If yes, page number: [42](#)
 - STBG or other federal funds (Year 1 amount shown in FDOT Tentative Work Program)? [Yes](#)
 - Prior year active FTA contracts (PTGAs) with estimated amount? (contracts will be aligned in the fall once we have remaining balances at the end of the fiscal year.) [Select response](#)
- FINAL UPWP:
 - PL funds, which include Year 1 FTA 5305(d) and Year 1 PL funds (refer to Chris Bratton’s UPDATED PL Spreadsheet, which will include the MPO Board approved de-obligated amount)? [Select response](#)
 - STBG funds or other federal funds (Year 1 amount shown in FDOT Tentative Work Program) + MPO Board approved de-obligated funds (if applicable) [Select response](#)
 - Prior year active FTA contracts (PTGAs) with estimated amount? (contracts will be aligned in the fall once we have remaining balances at the end of the fiscal year.) [Select response](#)
- Does the Funding Source Budget Table include soft match amounts? [Select response](#)

[Choose a category](#)

[Click here to enter comments](#)

Total Year 2 contract amounts:

- DRAFT UPWP:
 - PL funds, which include Year 2 FTA 5305(d) and Year 2 PL funds (refer to Chris Bratton’s UPDATED PL Spreadsheet, which will include the MPO Board approved de-obligated amount)? [Yes](#) | If yes, page number: [Click or tap here to enter text.43](#)
 - STBG or other federal funds (Year 2 amount shown in FDOT Tentative Work Program)? [Select response](#)
- FINAL UPWP:
 - PL funds, which include Year 2 FTA 5305(d) and Year 2 PL funds (refer to Chris Bratton’s UPDATED PL Spreadsheet, which will include the MPO Board approved de-obligated amount)? [Select response](#)
 - STBG funds or other federal funds (Year 2 amount shown in FDOT Tentative Work Program) + MPO Board approved de-obligated funds (if applicable) [Select response](#)
- Does the Funding Source Budget Table include soft match amounts? [Select response](#)

[Editorial](#)

De-obligation not adopted at the time of submittal of draft UPWP

Since the UPWP is the “Scope of Service” for the FDOT/MPO Agreement, it is important to confirm that the total amounts for Year 1 and Year 2 in the UPWP also match what is shown on the FDOT/MPO Agreement.

Unified Planning Work Program (UPWP)

Review Checklist

- Do the FINAL UPWP PL amounts shown in Year 1 plus Year 2 match what is shown on the new FDOT/MPO Agreement? [Select response](#)
- Does Other FHWA funding (i.e., SU, CMAQ, etc.) amounts shown in Year 1 and Year 2 match what is shown on the new FDOT/MPO Agreement? [Select response](#)

[Choose a category](#) [Click here to enter comments](#)

Summary Budget Table

Did the MPO use the UPWP Budget Table template provided by the Central Office for the Summary Budget Table?

[Select response](#)

Do the **total Year 1 contract amounts** match what is shown on the Funding Source Budget Table? [Yes](#)

Do the **total Year 2 contract amounts** match what is shown on the Funding Source Budget Table? [Yes](#)

[Choose a category](#) [Click here to enter comments](#)

General UPWP Comments

[Choose a category](#) [Click here to enter comments](#)

[Choose a category](#) [Click here to enter comments](#)

[Choose a category](#) [Click here to enter comments](#)

[Choose a category](#) [Click here to enter comments](#)



Federal Highway Administration
 Florida Division Office
 3500 Financial Plaza, Suite 400
 Tallahassee, Florida 32312
 (850) 553-2201
 www.fhwa.dot.gov/fldiv

Federal Transit Administration
 Region 4 Office
 230 Peachtree St, NW, Suite 1400
 Atlanta, Georgia 30303
 (404) 865-5600

Planning Comments

Document Name: Draft UPWP FY 2024/2025 – 2025/2026

MPO: Ocala Marion

Date of Document:
03/15/2024

Date Received
03/15/2024

Date Reviewed
04/15/2024

District: 5

Reviewed by: Jean Parlow

COMMENTS

	Comment Type	Comment Description
1	Critical	Statutory Requirement: Please ensure the UPWP includes information that demonstrates how the annual 2.5% set-aside of PL Funds for Complete Streets is met.
2	Critical	Purchases: Please note that any equipment purchases equal to or greater than \$5,000 (for a single unit) must have prior FHWA Approval, unless the UPWP contains sufficient detailed information to facilitate such approval during the document review process..
3	Critical	Federal Aid Project (FAP) & State Financial Management Numbers: Please ensure the updated Federal Aid Project (FAP) number and the State Financial Management (FM) numbers are used for the final UPWP.
4	General Comment	Continuity of Operations (COOP): Please include activities under the appropriate task to review and update the MPO's COOP to consider pandemic scenarios. As applicable the MPO should review and consider what alternative operational and alternative public involvement outreach strategies may be required for these type of events (particularly if it is long term). This review may entail updating operational documents such as PPPs, bylaws, and others.
5	General Comment	All Agreements or Certifications including Debarment and Suspension, Contracts, Grants, and Cooperative Agreements, Title VI Nondiscrimination Policy Statement and Disadvantaged Business Enterprise (DBE) statements should be signed and dated and included in the final version of the UPWP document.

6	General Comment	<p>Regional Coordinated Efforts: If the MPO will be contributing any federal funds to another MPO or entity for regional coordination work and end products (or the MPO is receiving federal funds from other MPOs or entities for the same or any purpose), those funds and activities must be reflected in all the participating MPOs' UPWPs consistently. Please coordinate with FDOT Liaison and FHWA Planner to ensure use of the proper format and documentation reflecting the funds, and the related activities. Please also provide FHWA with a copy of any Memorandum of Understanding (MOU) for such activities.</p>
7	General Comment	<p>UPWP Tasks: Please ensure that Tasks include adequate level of detail including task description, work to be accomplished for each task, schedule showing anticipated completion dates, cost, and who will be doing the work (staff or consultant).</p> <p>It will continue to be the responsibility of the District and MPO to ensure that all activities undertaken in the UPWP tasks are eligible and allowable costs.</p>
8	General Comment	<p>If applicable, please include in the appropriate Task an activity to capture the MPO's efforts to address any changes resulting from the release of the 2020 U.S. Census results</p>
9	Critical	<p>Please verify funding levels available to the MPO prior to the final UPWP submission if including funds de-obligated from the FY23-FY24 UPWP. If funding is overprogrammed, the UPWP will be approved only for the levels of funding available and verified from the Central Office.</p> <p>Also please ensure that the Final UPWP funding amounts reflect de-obligated funds from previous UPWP.</p>
10		

APPENDIX E: COST ALLOCATION AND STAFF SERVICES AGREEMENT

Marion County Board of County Commissioners
 Detail of Cost Allocation
 Rev- Fiscal Year 2024-25

BR407, 408, 409 BR407, 408, 409 **BR407, 408, 409**

Type of Central Service	TPO 2022-23	TPO 2023-24	TPO 2024-25
Independent Audit Fee	230	258	228
Clerk of the Circuit Court - Finance	6,098	7,032	6,834
Clerk of the Circuit Court - Internal Auditor	758	599	490
Clerk of the Circuit Court - Budget	10,271	9,941	9,343
BCC Records	712	849	1,023
Records Center	-	-	-
County Attorney	171	178	225
County Administration	4,766	5,541	7,229
Information Systems	15,121	11,291	10,941
Human Resources	3,032	1,875	2,484
Procurement	6,203	7,342	9,315
Human Resources - Clinic	-	-	104
Facilities Management	8,894	9,313	11,985
Public Safety Radio	-	-	-
MSTU / Assessments Office	-	-	-
Tax Collector (Assessment)	-	-	-
Property Appraiser (Assessment)	-	-	-
Total Costs Identified	\$ 56,255	\$ 54,220	\$ 60,200.00
Identified Costs not Allocated		-	-
Actual Budgeted Allocation	\$ 56,255	\$ 54,220	\$ 60,200

STAFF SERVICES AGREEMENT

THIS STAFF SERVICES AGREEMENT is made and entered into this 21 day of January, 2020 between the Ocala/Marion County Transportation Planning Organization, created and operating pursuant to Section 339.175, Florida Statutes (hereinafter called the "TPO"), and the Marion County Board of County Commissioners, a political subdivision of the State of Florida (hereinafter called the "COUNTY").

WITNESSETH:

WHEREAS, 23 U.S.C. 134 and Section 339.175, Florida Statutes provides for the designation of a metropolitan planning organization for each urbanized area of the state; and

WHEREAS, pursuant to Section 339.175(4), F.S., the Governor, by letter dated the 13th day of February 2014, approved the apportionment and boundary plan submitted by the TPO; and

WHEREAS, the TPO, pursuant to the power conferred upon it by Section 339.175(6)(g), Florida Statutes, and Section 5.00 of the Interlocal Agreement between Marion county, the City of Ocala, the City of Belleview, and the City of Dunnellon, and the Florida Department of Transportation, (FDOT), dated May 18, 2004, as amended, may enter into agreements with local agencies to utilize the staff resources of such agencies or for the performance of certain services by such agencies; and

WHEREAS, pursuant to Section 339.175(2)(b), Florida Statutes, the TPO is an independent governmental entity separate and distinct form the COUNTY; and

WHEREAS, the TPO is desirous of obtaining certain services from the COUNTY to assist with the TPO functions of managing the continuing, cooperative and comprehensive transportation planning process as mandated by State and Federal law; and

WHEREAS, it is deemed by the parties to be appropriate and necessary that the duties and obligation of the TPO and the COUNTY in relation to the staffing of the TPO be defined and fixed by formal agreement.

NOW, THEREFORE, in consideration the mutual covenants, premises, and representations herein, the parties agree as follows:

1. **Purpose.** For the reasons recited in the preamble, which are hereby adopted as part thereof, this Staff Services agreement (Agreement) is to provide for professional services to carry out the term of the Intergovernmental Coordination and Review and Public Transportation Coordination Joint Participation Agreement, dated September 19, 2017 between the TPO and the FDOT and to provide personnel for the administration of the TPO.
2. **Scope of Services.** It is agreed by the COUNTY that it shall support the TPO with the staff necessary for professional, technical, administrative, and clerical services, office and other space, and other incidental items as may be required and necessary to manage the business and affairs of the TPO and to carry on the transportation planning and programming process specified by the Transportation Planning Joint Participation Agreement; provided, it is understood and agreed that, unless otherwise provided for, the performance of such service and functions shall be limited to those specified and allocated in the TPO's federally approved two-year Unified Planning Work Program (UPWP) budget and all approved budgets and management reports under Federal or State grant contracts with the TPO. The UPWP shall be prepared by the TPO support Staff in cooperation

with all related State and Federal agencies and TPO committees in accordance with the rules and regulations governing the TPO and shall be subject to the approval of the TPO Governing Board before submittal to State or Federal Agencies.

3. **Cost Allocation.** The TPO shall be responsible for all direct and indirect costs of services provided by the COUNTY. A Cost Allocation Plan will be maintained and updated to identify the costs to the TPO for the use of COUNTY facilities, resources and staff services during each fiscal year. A cost allocation rate will be monitored by the Budget Office of the Clerk of the Circuit Court to specifically reflect the TPO organizational needs and staff size, including occupation of office space at the Marion County Growth Services Building.

4. **TPO Director.** The TPO Director shall be selected by the TPO Governing Board. Pursuant to Section 339.715(6)(g) Florida Statutes, the TPO Director shall report directly to the TPO Governing Board for all matters relating to the administration and operation of the TPO. **The County Administrator shall serve as a resource to assist the TPO Director in the execution of the TPO's operations and priorities.** The TPO Director shall be responsible for the development of an appropriate organizational structure to carry out the responsibilities set forth in this Agreement, development of procedures to monitor and coordinate the planning process, as well as the overall administration of TPO programs. Addition of new personnel shall be subject to approval of the TPO Governing Board. The TPO chairman and his/her designee shall be responsible for the annual performance evaluation of the TPO Director using the standard COUNTY performance evaluation process.

5. **TPO Personnel.** The TPO Director shall be responsible for full oversight and supervision of TPO support staff. Subject to TPO Governing Board approval and within the existing COUNTY's Job Classifications Plan, the TPO Director responsibilities include adding or deleting staff or staff positions, adjusting responsibilities and salaries, and to recommend through the COUNTY HR department when to hire, terminate, discipline or suspend personnel in accordance with the rules and procedures established in the COUNTY's Employee Handbook. TPO support staff, as COUNTY employees, shall abide by the COUNTY's Employee Handbook. When the TPO Governing Board approves TPO personnel changes, all records shall be submitted to the COUNTY for documentation purposes only and no further action shall be necessary by the COUNTY.

5.1 The TPO Director shall be responsible for submitting all the necessary information to establish job descriptions and pay grades within the COUNTY's Job Classification Plan for TPO positions. Each pay grade will define a minimum, mid-point and a maximum for the position. The TPO Director shall be responsible for coordinating with Marion County Human Resources to determine the salary for new hires up to 75% of the paygrade range in accordance with the rules and procedures established in the COUNTY's Employee Handbook.

7. **Legal Representation.** The TPO shall utilize the services of the COUNTY's attorney as needed. The TPO may employ special legal counsel for specific needs when it is deemed necessary.

9. **Financial Administration**

9.1 The records and accounts of the TPO including receipts, expenditures and deposits shall be administered by the TPO support staff with final processing of such by the COUNTY. The COUNTY shall include TPO revenues and expenditures in the COUNTY budget, and will authorize the Marion County Clerk of the Circuit Court

without further action by the COUNTY to pay expenses from the appropriated funds subject to reimbursement, subject to meeting all appropriate State and Federal Regulations. .

- 9.2 Contracts and bids for the purchase of materials and services shall be in accordance with COUNTY procedures for the same purposes. The TPO shall follow the County Procurement process for all contracts and bids. The TPO Director and TPO Governing Board shall review and approve all Requests for Proposals (RFP) and subsequent contracts. Subject to meeting all appropriate State and Federal Regulations, when the TPO Governing Board approves a contract or bid, all records shall be submitted to the COUNTY for documentation purposes only and no further action shall be necessary by the COUNTY.

10. **Asset Management.** All equipment and supplies purchased by the TPO with federal funding are the property of the TPO. The TPO will maintain a property inventory per federal regulations [C.F.R.200.313(d)], and update at least once every two years. Any disposition of TPO property with assistance or support by the COUNTY must be approved by the TPO and in accordance with federal regulation outlined in 2 C.F.R.200.313(3).

11. **Training.** Pursuant to Section 339.715(6)(h) Florida Statutes, the TPO shall provide training opportunities and training funds specifically for local elected officials and others who serve on the TPO Governing Board. These training opportunities may be conducted by the TPO or through statewide and federal training programs and initiative that are specifically designed to meet the needs of TPO Governing Board members.

12. **Travel.** All travel by TPO personnel and Governing Board members shall be approved by the TPO Director. All travel by the TPO Director shall be approved by the TPO Board. All travel expenses shall be paid consistent with the provisions of Section 112.061, Florida Statutes. The TPO shall pay all Class "C" travel expenses, as defined in Section 112.061, in accordance with the policies established in the UPWP. The COUNTY shall have no function or responsibility with respect to the approval of travel of any TPO staff or Governing Board members.

12.1 Each year the TPO Governing Board shall follow the per diem rates outlined in the TPO Travel Policy as part of the annual UPWP process.

13. **Reimbursement to Marion County.** The TPO hereby agrees that it shall reimburse the COUNTY for all services rendered under this Agreement as specified in the UPWP budget and all approved budgets under Federal or State grant contracts. The determination of eligible costs shall be in accordance with 23 CFR Section 420, Federal Management Circular (FMC) 74-4, as appropriate.

14. **Local Share.** The COUNTY will provide cash for the required match for Federal funds from the Federal Highway Administration (FHWA) and the Federal Transit Administration (FTA).

15. **Invoices and Progress Reports.** The TPO shall provide to the FDOT or appropriate Federal agencies progress reports and an invoice for reimbursement for all Federal grants with FHWA and FTA. The progress reports and invoices shall be in sufficient detail for audit purposes.

16. **Payment.** Payment to the COUNTY of any and all monies by the TPO is contingent upon the TPO first receiving the funds for the work tasks from the FDOT, FHWA, or FTA.

17. **Information and Reports.** The TPO will provide all required information and reports and will permit access to its books, records, accounts, and other sources of information, and its facilities as may be determined by FDOT, FHWA, or FTA to be pertinent to ascertain compliance with such regulations, orders and instructions. The TPO shall adhere to Chapter 119 Florida Statutes regarding public records. Where any information required of the TPO is in the exclusive possession of another who fails or refuses to furnish this information, the TPO shall certify to FDOT, FHWA, or FTA as appropriate, and shall set forth what efforts it has made to obtain the information.

18. **Amendment of Agreement.** The COUNTY and the TPO may, upon initiation of either party, amend this Agreement to cure any ambiguity, defect, omission or to grant any additional powers, or to confer additional duties which are consistent with the intent and purpose of this Agreement subject to formal approval by resolution of each party.

19. **Effective Date and Term.** This Agreement shall become effective on January 28, 2020 upon approval by the TPO and the Marion County Board of County Commission and remain in effect for a period of five years. At that time, the TPO shall review this Agreement to determine if any changes are warranted.

20. **Termination.** Either party may terminate this Agreement by providing written notice of intent to terminate to the other party at least ninety (90) days prior to the then current fiscal year; provided, that financial commitments made prior to termination are effective and binding for their full term and amount regardless of termination. The effective date of any termination shall be the end of the then current fiscal year, unless both parties agree to an alternative date of termination.

IN WITNESS WHEREOF, the undersigned parties have caused this Staff Services Agreement to be duly executed in their behalf this 21 day of January, 2020.

MARION COUNTY BOARD OF
COUNTY COMMISSIONERS

By: Kathy Bryant
Kathy Bryant, Chairman

OCALA / MARION COUNTY
TRANSPORTATION PLANNING
ORGANIZATION

By: Jeff Gold
Jeff Gold, TPO Chair

ATTEST: David R. Ellspermann
David R. Ellspermann,
Marion County Clerk of the
Circuit Court

ATTEST: John Beut
TPO Director

Approved as to form and legality

Mathew G. Minter
Mathew G. Minter, County Attorney

APPENDIX F: TPO TRAVEL POLICY

Ocala Marion County Transportation Planning Organization



Travel Policy

Resolution
No. 22-6

RESOLUTION OF THE OCALA/MARION COUNTY TRANSPORTATION PLANNING ORGANIZATION (TPO)
ENDORING THE ADOPTION OF THE TPO TRAVEL POLICY

WHEREAS, the Ocala/Marion County Transportation Planning Organization, designated by the Governor of the State of Florida as the Metropolitan Planning Organization (MPO) and body responsible for the urban transportation planning process for the Ocala/Marion County area; and

WHEREAS, Florida Statutes Section 112.061(14) allows TPO/MPOs to establish rates that vary from the standard state per diem rates by enactment of a resolution, provided that the rates apply uniformly to all travel by the entity; and

WHEREAS, the policies and procedures concerning the reimbursement of travel expenses are outlined in the TPO Travel Policy, updated and approved by the TPO Board on February 22, 2022.

NOW THEREFORE BE IT RESOLVED by the Ocala/Marion County Transportation Planning Organization adopts the TPO Travel Policy.

CERTIFICATE

The undersigned duly qualified and acting Chairman of the Ocala/Marion County Transportation Planning Organization hereby certifies that the foregoing is a true and correct copy of a Resolution adopted at a legally convened meeting of the Ocala/Marion County Transportation Planning Organization held on this 26th day of April 2022.

By: 
Ire Bethea Sr., Chair

Attest: 
Rob Balmes, Director

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Section 1: General

1.1 Purpose

To establish policies and procedures for the payment and/or reimbursement of expenses incurred while traveling on official TPO business.

1.2 Scope and Applicability

These regulations apply to all travel for TPO employees, elected and appointed officials, advisory board members, volunteers, and all others who are authorized to travel on official TPO business.

1.3 Roles and Responsibility

1) Director

- a) Ensure all travel expenditures have been budgeted.
- b) Ensure that travel is related to TPO business and expenses are reasonable and necessary in accordance with this policy.
- c) Ensure that travelers understand their responsibilities and initiate the appropriate action when procedures are not followed.
- d) Review travel related documentation to ensure that travelers have adhered to the travel policy.
- e) Ensure that accurate and complete Travel Expense Reports are submitted in accordance with the schedule established in this policy.
- f) Authorize travel and approve the Travel Expense Report.
- g) Retain Travel Expense Report and backup information subject to audit.

2) Travelers

- a) Exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business.
- b) Be knowledgeable of and adhere to the requirements set forth in this policy.
- c) Submit Travel Expense Report within 15 business days after the completion of travel that documents all expenses related to the total cost of travel.

1.4 Authorizations

- 1) Every traveler should seek approval from the Director prior to incurring any expenses.
- 2) Travel must be necessary for the proper execution of official TPO business. Meetings and conferences must be of a professional nature that will increase the attending individual's value to the TPO.
- 3) Upon the completion of travel, a Travel Expense Report will be completed and the following will review the request for compliance with the TPO's travel policy.
 - a) Director will be approved by the TPO Board.
- 4) Travel Advances are considered the exception, not the rule. If a travel advance is necessary, it must be approved by the Director. The traveler is responsible to submit this request the Friday prior to the scheduled payroll run.
- 5) A payroll deduction will automatically be made if a travel advance is outstanding for more than 30 days, and is directly attributed to the traveler's failure to properly file the Travel Expense Report.

1.5 Procurement Card Use

- 1) The procurement card (P-card) shall be used to pay for airline tickets, lodging, car rental, and registration fees whenever possible. If the traveler does not possess a P-card and someone else within their department does, the cardholder may elect to authorize these charges on their P-card.
- 2) The P-card SHALL NOT BE used for expenses that are reimbursed to the traveler at a flat rate, e.g. meals and mileage.
- 3) The P-card may be used to purchase gas when the traveler is using a Marion County or rental vehicle for out-of-town travel.
- 4) The traveler is responsible for documenting and submitting copies of these receipts on the Travel Expense Report.

1.6 Missing Receipts

If travel expense receipts are lost or stolen, a reasonable attempt to obtain duplicate receipts must be made. If duplicates cannot be secured, a statement of the facts explaining the incident must accompany the completed Travel Expense Report.

1.7 Letter of Agreement

When an employee attends advanced-level training that exceeds \$2,000 and leaves the TPO before the end of one year after completion of training, the traveler will be required to enter into a

contractual agreement to reimburse the TPO on a pro-rated basis for travel expenses as defined in the Marion County Employee Handbook and the Marion County Training Reimbursement Policy and Agreement.

Advanced-level training is training that is not required by the Director and will enhance an employee's abilities and/or advance their career.

Section 2: Travel Expense Requirements/Guidelines

2.1 General Principles

- 1) The traveler shall be reimbursed for authorized expenses that are in compliance with the requirements of this policy and are associated with an approved trip.
- 2) Travel arrangements should be made as early as possible to take advantage of early discounts and advance purchase prices.
- 3) When online travel is available, unless otherwise approved by Director, travel will not be permitted. Arrangements associated with the travel shall be the most economical available and result in the shortest "time-away".
- 4) Reimbursement is limited to the traveler only. The TPO will not reimburse any expenses for a traveler's spouse and family.
- 5) The TPO is exempt from the Florida Sales Tax. The traveler must print a copy of the tax exemption certificate prior to traveling in order to obtain the exemption. The traveler is responsible for taxes charged unless there is a written justifiable explanation of the facts.
- 6) Any travel associated with grants or other funding sources must comply with all provisions stipulated by the sponsoring agency or with all provisions of this travel policy if more restrictive. If the sponsoring agency's provisions are more restrictive than this policy, TPO policy will take precedence and the TPO will compensate for the difference.
- 7) Any advance or reimbursement due to the employee will be paid through the employee's payroll direct deposit as a non-taxable reimbursement. Same day travel meals described in Section 2.4.3 will be processed through payroll also, but as a taxable fringe benefit (per IRS regulations). IRS rules will prevail over the taxability of reimbursements.
- 8) Travelers must submit a complete Travel Expense Report that includes all travel related expenses such as, registration, gas, mileage, lodging, meals, tolls, parking fees, or rental car for trips outside of Marion County.

2.2 Registration Fees

- 1) Fees should only be paid after the proper travel authorization is secured.
- 2) Fees for registration, including meals and other programmed affairs sponsored by a conference or convention organization, shall be prepaid whenever possible. The use of the P-card for this expense is the preferred method of payment. A traveler can be reimbursed if a paid receipt is presented.
- 3) Payment for registration fees will be written directly to the sponsoring organization. The traveler is responsible to disburse backup documentation to the organization.
- 4) The TPO will not pay fees associated with entertainment events/dinners that are optional and not included as a part of the registration fee. These fees should not be charged to the P-card.
- 5) For payment to be advanced or reimbursed, a traveler must submit a copy of the agenda, or a certificate of attendance.

2.3 Transportation

- 1) Commercial Air Travel
 - a) Coach fare class shall be taken for all travel by air.
 - b) If air travel is booked via the Internet, the confirmation notice that states the amount shall be submitted to verify the cost.
 - c) Ticket insurance and additional accident or life insurance for persons traveling by commercial air travel will not be reimbursed.
 - d) The actual cost incurred for parking a private vehicle at the airport while the traveler is away shall be reimbursed. A receipt is required.
- 2) TPO Vehicle
 - a) The use of TPO-owned vehicles must be authorized by the Director.
 - b) When transportation is by a TPO-owned vehicle, reimbursable expenses will be limited to actual costs incurred for fuel, oil, and necessary vehicular maintenance and repairs supported by receipt or invoice; however, the P-card is the preferred method of payment for these expenses.
 - c) Parking tickets and moving vehicle citations are the responsibility of the traveler.
- 3) Privately Owned Automobile
 - a) The use of a privately-owned vehicle requires Director approval. Mileage reimbursement for use of a privately-owned vehicle will not be authorized without Director approval.
 - b) The traveler is entitled to a mileage allowance not to exceed IRS guidelines.
 - c) The individual operating the privately owned vehicle must possess a valid driver's license and the

vehicle must be insured with the minimum required insurance for the State of Florida.

- d) The mileage reimbursed shall be reasonable and comparable to other methods of travel. If MapQuest or another similar source is used, a printout substantiating the mileage claim should be attached to the Travel Expense Report.
- e) The mileage allowable will be from the traveler's official headquarters or point of origin, whichever is less, to the destination point. The official headquarters is defined as the traveler's normal work place or if there is no normal work place, the departmental headquarters location.
- f) A reasonable amount of vicinity travel is reimbursable to the traveler. Reasonable vicinity mileage is considered less than 25 miles per travel period. Requests for vicinity mileage exceeding 25 miles should be accompanied by a written explanation from the traveler substantiating the mileage claim.
- g) If there are multiple travelers going to the same destination, carpooling is required unless specifically authorized by the Director. If there are multiple travelers riding in the same privately owned vehicle, only one individual will be reimbursed for mileage.
- h) Employees receiving a vehicle allowance as part of their salary package are entitled to reimbursement for mileage when using their personal vehicle outside of Marion County.
- i) Parking tickets and moving vehicle citations are the responsibility of the traveler.

4) Rental Vehicle

- a) A vehicle may be rented when deemed appropriate by the Director. The use of rental vehicles should be limited to those instances where Marion County, privately owned vehicles or reasonable public transportation is unavailable.
- b) Whenever possible, the State contract for rental cars should be utilized.
- c) Maximum reimbursement for rental cars will be limited to the mid-size sedan rate or a vehicle with a comparable rate.
- d) Travelers utilizing rental cars will be reimbursed for gasoline if receipts are provided; however, the P-card is the preferred method of payment.
- e) Collision-damage waivers are recommended to be purchased when obtaining a rental vehicle. Marion County also has a self-insured program to cover claims.
- f) If a rental vehicle is booked via the Internet, the confirmation notice that states the amount shall be submitted to verify the cost. A receipt shall also be submitted upon return.

2.4 Meals and Incidentals

- 1) Employees shall be paid per diem for TPO related travel in accordance with U.S. General Services Administration (GSA). The most current meal and incidental allowances for standard and specified rates are provided at: www.GSA.gov/travel-resources.
- 2) No receipts for meals are required.

- 3) Meals for same day travel, which do not require an overnight stay, are allowed as provided in section 2.8.3 of this policy. Reimbursements granted will be a taxable fringe benefit (per IRS regulations) and will be included in your payroll direct deposit as taxable.
- 4) **The TPO, at its discretion, may allow employees to claim a meal allowance at an event with a meal(s) included as part of the registration fee if:
 - a. You are unable to consume the furnished meal(s) because of medical requirements or religious beliefs.
 - b. You requested specific approval to claim the full meal allowance prior to your travel.
 - c. You have made a reasonable effort to make alternative meal arrangements, but were unable to do so.
 - d. You purchased substitute meals in order to satisfy your medical or religious requirements.
- 5) At the TPO's discretion, you may also claim the full meal allowance if you were unable to take part in an event furnished meal due to the conduct of official business.

2.5 Lodging

- 1) The use of the P-card for this expense is the preferred method of payment.
- 2) The lodging expense is limited to single occupancy or occupancy shared with another TPO traveler.
- 3) Lodging costs in excess of the single room rate will not be reimbursed except when the additional occupant is an authorized TPO traveler.
- 4) If a hotel is booked via the Internet, the confirmation notice that states the amount shall be submitted to verify the cost.
- 5) Requests for reimbursement for lodging must be accompanied by an itemized paid receipt from the hotel, motel, etc. Extended stays must be paid by the traveler.

**Source: General Services Administration (GSA) Subchapter B-Allowable Travel Expenses- <https://www.gsa.gov/policy-regulations/regulations/federal-travel-regulation-ftr/i1206091#i1204040>

2.6 Miscellaneous Expenses

- 1) Communication expenses, including charges for telephone, facsimile, and internet access, to conduct official TPO business with the traveler are reimbursable if a receipt is provided.
- 2) Bridge, road, and tunnel tolls will be reimbursed when receipts are provided.
- 3) Parking charges will be reimbursed. Receipts for all parking charges must be provided. Parking meter charges will be paid without receipts if reasonable and approved by the Director.
- 4) Any other reasonable expense not otherwise provided for but incurred for the benefit of the TPO, will be reimbursed if receipts are provided and approved by the Director.

2.7 Nonrefundable Travel Expenses in Connection with Canceled Travel

- 1) Reimbursement for prepaid travel expenses may be allowed when the travel is canceled for legitimate reasons. Only the portion of the prepaid expenses that is nonrefundable is reimbursable.
- 2) The originating department shall be responsible for requesting a refund (full or partial) of expenses paid in advance by the TPO when the traveler does not attend the function.
- 3) A memo justifying the cancellation of travel, a paid receipt and certification that the expense is nonrefundable should be included with the Travel Expense Report.
- 4) The traveler shall be personally responsible for reimbursement of any expenses paid by the TPO when the traveler does not attend the function due to their own negligence.

2.8 Same Day Travel – Out of County

- 1) If the use of a privately owned vehicle is approved by the Director, mileage will be reimbursed in accordance with IRS guidelines.
- 2) Travelers must submit a Travel Expense Report if there are any travel related expenses such as registration, gas, mileage, lodging, meals, or rental vehicles. One report can be used if several travelers register for the same conference, travel in one vehicle and do not have a reimbursement due.
- 3) For same day travel which does not require an overnight stay, the standard meal allowance will be granted, but it will be a taxable fringe benefit (per IRS regulations) This reimbursement will be included in your payroll direct deposit as taxable.

2.9 Intra-County Travel

- 1) Employees that have a need to travel within the boundaries of Marion County shall use a Marion County vehicle, when possible. The use of a privately-owned vehicle for Intra-County travel must be approved by the Director.
- 2) Employees who utilize their personal vehicle and are not receiving an auto allowance are entitled to a mileage allowance equal to the standard mileage rate established annually by the IRS.
- 3) Employees receiving an auto allowance shall use their personal vehicles and will not be reimbursed for mileage for Intra-County Travel.
- 4) Reimbursement for Intra-County mileage will be submitted on the Intra-County Reimbursement form.
- 5) Parking tickets and moving vehicle citations are the responsibility of the traveler.
- 6) Travel Expense Reports are NOT required for travel within Marion County.