

APPENDIX G-1: METRANS STAKEHOLDER SURVEY

Background

As part of the development of the California Freight Mobility Plan (CFMP), Caltrans, Division of Transportation Planning, Division of Transportation Planning, Office of System, Freight, and Rail Planning used the consulting services of METRANS, California State University, Long Beach for an initial scoping study for the CFMP that would engage a diversity of stakeholders and to create greater understanding of our stakeholder's needs and priorities and to help shape the development of the CFMP.

The Principal Investigator for the study was Dr. Thomas O'Brien, Director of Research at California State University Long Beach's Center for International Trade and Transportation (CITT). METRANS conducted the "California Freight Mobility Plan (CFMP) Stakeholder Survey." The electronic survey was sent to more than 180 stakeholders in August and September of 2012. METRANS received 72 completed surveys, of which 27 responders participated in a 45-minute follow-up telephone interview. The 33-question survey was conducted on-line using Qualtrics Survey Software in a multiple choice format with room for supplementary comments. To keep the survey and interview responses anonymous, the survey team analyzed the completed survey responses to capture the key findings without attribution.

Completed surveys represented a broad range of public, private, and community interests. Public sector respondents accounted for nearly 75 percent of the completed surveys. As an indication of their involvement in goods movement policy development, 79 percent of the stakeholders were aware of the 2005/2006 Goods Movement Action Plan (GMAP). Although industry and environmental stakeholders were expected to be diverse and passionate in their views, there were several questions in which more than of the 75percent responses were consistent. This summary highlights the responses in which there was general agreement and the most frequent answers for questions that requested rankings.

Key Survey Findings

- Respondents recommended that the state freight planning office focus on developing funding resources, developing statewide freight plans and bringing key stakeholders together. Respondents also recommended that the CFMP include a statewide prioritized list of projects.
- Nearly 200 projects were identified as a "top five priority" needed by all respondent's organizations to improve the flow of goods.
- The CFMP objectives should have private and public sector benefits. To address both, respondents noted that objectives should improve goods movement reliability, reduce goods movement travel time and cost, improve freight rail and freight intermodal connections, improve local and intra-regional goods movement. In addition, the CFMP should continue to focus on increasing mobility and addressing traffic relief; improving goods movement, reducing environmental impacts of freight movement, improving air quality, protecting public health, enhancing public safety, maximize economic and public benefit, and generate jobs.
- The CFMP should continue to emphasize the four primary priority freight regions and corridors (Los Angeles/Inland Empire, San Diego/Border, San Francisco Bay Area, and Central Valley), and focus on inter-regional connectivity and statewide priorities.
- Most respondents (other than environmental advocates) noted that CEQA needs "reform" or "streamlining" and that it should not hinder environmental protection.
- The top five **goods movement problems / issues** identified were:
 1. Freight rail and freight intermodal terminal access
 2. Community and environmental impacts
 3. Seaport access
 4. General state of highways
 5. Need for highway-rail grade separations.

The top five “**Outside California Threats**” noted were:

1. Panama Canal expansion
 2. Prince Rupert and other Canadian port developments
 3. Freight rail access improvement
 4. Mexican port development
 5. Gulf Coast investments.
- The top five **constraints** identified were:
 1. Lack of project financing
 2. Environmental issues or controversy
 3. Regulatory and jurisdictional conflicts
 4. Project approval processes
 5. Community opposition.
 - Respondents were asked to rank the **importance to their organization** and stakeholders of an extensive list of freight-related issue areas in developing policies for statewide freight. The top five **most important policy issues** selected were:
 1. Jobs and the economy
 2. Regional and state economic competitiveness
 3. Public funding and financing for infrastructure
 4. Sustainable goods movement systems
 5. Public health impacts and safety.
 - Respondents were asked to rank the top five **emerging national and global freight trends**. The top five most significant trends noted were:
 1. Larger ocean vessels with more capacity
 2. Changing geography of supply chain
 3. Shifts in global manufacturing and sourcing
 4. Transshipment (e.g., demand for transload / cross-dock infrastructure)
 5. Rising fuel costs
 6. Freight rail and freight intermodal terminal road access improvements.
 - Respondents were asked to rate the relevance to their organization of an extensive list of funding sources in terms of effectively addressing their goods movement priorities. The top five **most relevant funding sources** were:
 1. Trade Corridors Improvement Funds [Proposition 1B (TCIF) - *Voter approved bond funding*]
 2. Federal Economic Stimulus Grants
 3. Federal gas tax; voter- approved tax measures
 4. Environmental impact fees.
 - Although very few respondents noted that they undertake post-project evaluation measures, they ranked the following **performance measures for evaluating investment effectiveness** in the top 5:
 1. Freight network efficiency
 2. Freight network capacity improvements
 3. Cost-effectiveness
 4. Reliability
 5. Environmental quality.
 - The survey respondent’s listed nearly 75 critical documents or websites used by their organization to assist with freight planning and or decision making. Forty-eight survey respondents also identified their five most critical project partners.
 - In response to the survey question, "Which, if any, aspects of the GMAP should be: enhanced, deleted, updated or don't know, in the forthcoming Freight Mobility Plan (FMP)?", respondents' top five selections were to update or enhance: policies pertaining to addressing greenhouse gases (GHG); Caltrans’ interaction with stakeholders; GMAP Guiding Principles; address project gaps; and continuing emphasis on the four primary freight corridors. The CFMP development process and Caltrans’ interaction with stakeholders should be enhanced.