

Request for Technical Assistance – Port Investment Plan Toolkit

Summary

American Association of Port Authorities (AAPA) has partnered with the Department of Transportation’s Maritime Administration¹ to develop a port investment plan toolkit that, once complete, will be made available in the public domain. **AAPA seeks a limited number of technical experts from ports and firms engaged in port planning, financing and development, who are willing to contribute their expertise to the production of a number of components of the toolkit.** (AAPA will also be hiring a contractor, through a separate process, to conduct focus groups and other meetings of these technical experts and to develop the tool kit).

Initiative

AAPA and the Maritime Administration have signed a first-of-its-kind cooperative agreement to develop the port investment plan toolkit mentioned above. Port authorities looking to attract public and/or private capital to fund their infrastructure projects can use the toolkit to develop investment-quality infrastructure development plans. The toolkit will include, among other things: guidance on writing grant applications, methods to analyze a project’s economic benefits, and examples of best practices. The goal of this project is to develop tools that will assist ports in obtaining funding in a variety of ways, including but not limited to the following: (1) improve the chances of getting port infrastructure projects in metropolitan planning organization and state transportation plans in order to better compete for funding; (2) better position port projects for federal funding such as Transportation Investment Generating Economic Recovery (TIGER) grants; and (3) assist ports in obtaining private sector funding.

The components envisioned for this toolkit will help ports make more compelling economic arguments to compete for government grants and private-sector funding opportunities. By providing ports with guidance on how to clearly identify their future needs and proposing the most cost-effective, sustainable and efficient solutions for their projects, the result should be an ‘investment grade’ plan that helps develop needed infrastructure and facilities.

¹ Disclaimer: While the Port Investment Plan Toolkit is work supported by the U.S. Department of Transportation Maritime Administration under Agreement No. DTMA-91-H-2013-. Opinions or points of view expressed in this document are those of the authors and do not necessarily reflect the Official position of, or a position that is endorsed by, the U.S. Government, the U.S. Department of Transportation, or any sub-agency or employee thereof.

Participation

The AAPA seeks statements of interest from volunteers who are willing to provide technical assistance in developing components for the toolkit, and are particularly seeking expertise in the categories listed below. It is AAPA's intention is to recognize individual participants and their field of expertise in the final product.

We estimate that this multi-month initiative will require significant engagement on the part of the participants. Participants in the effort will provide expertise, content, materials and editing/review services. Travel to attend work-groups or in-person discussion might be required, and reasonable travel expenses may be compensated in some cases. Volunteers would be expected to provide their services gratuitously.

If you are interested in participating in this effort, please respond no later than close of business, Friday, 10 January, 2014 to Jean Godwin at jgodwin@aapa-ports.org with:

- your resume,
- a statement of interest,
- selection of your area(s) of expertise, and
- where your expertise best fits into this project.

Finally, as part of your statement of interest, include a discussion of the two most important components that should be included in a port planning toolkit and explain why (in no more than 2 pages).

Categories of Expertise

- 1) **Occupational/skillset areas** - *Rank up to three occupational/skillset areas that best represent the topics in which you have a high degree of expertise and significant career experience, by referencing the item number/letter, from the list below (e.g., 1b). If you feel that a critical skill set or topic area is missing, please let us know so that it can be considered for addition to the project.*
 - a. Benefit-Cost Analysis
 - b. Business-Case Analysis
 - c. Economic Impact Analysis
 - d. Community Outreach
 - e. Construction and Project Management
 - f. Data & Trend Analysis
 - g. Engineering /Coastal and Waterway
 - h. Engineering /Facility Design and Layout
 - i. Environmental Impact Analysis and Planning (i.e., NEPA Process)
 - j. Public Finance (i.e., bonds, public loans, grants)

- k. Private Finance (i.e., private equity, bank loans and investment)
- l. Macro-Economist /Trade/Freight Forecasting and Modeling
- m. Market Research and Analysis
- n. Port and Intermodal Planning
- o. Port Authority Operations/Administration
- p. Port Marketing
- q. Port Terminal Operations/Administration
- r. Real Estate
- s. Regional Transportation Planning and Engagement (i.e., with the MPO and State DOT)
- t. Risk Analysis and Management
- u. Supply Chain and Logistics
- v. Third Party Logistics / Freight Forwarder / Customs broker
- w. Transportation System Modeling
- x. Other (please list)

2) Where does your expertise best fit into the Port Investment Plan Toolkit

development modules? – *Select up to two areas where your professional expertise may be of greatest value to the project, by referencing the item number/letter, from the list below (e.g., 2b). Note that the categories below may overlap to some extent but have different levels of emphasis. If you feel that a critical subject is missing, please let us know so that it can be considered for addition to the project.*

- a. Understanding the state of a port’s infrastructure and examining the infrastructure’s usefulness in the context of the port’s mission and vision, local/regional shipping market, port intermodal connectivity, politics, local transportation plans (i.e., the MPO and State DOT long term freight and infrastructure improvement plans), regulatory requirements, and regional demographics.
- b. Developing an honest and credible assessment of a port’s current capacity and capabilities (strengths and gaps) that include intermodal linkages, land availability and usage, and the port’s overall strategic asset management.
- c. Determining the port’s short and long-term infrastructure needs, based on factors such as its freight capacity and volume (including MPO and State DOT traffic models), need to modernize or replace existing assets due to age or wear-and-tear, connections to the national freight network, environmental gaps, and the ability of expansion or improvement projects to expeditiously comply with environmental requirements.
- d. Choosing the best solutions (value engineering or benefit-cost analysis) for meeting the port’s identified needs. These solutions should balance cost effectiveness and efficiency and consider technological enhancements and more

efficient operations before building new infrastructure; integrate current and future environmental and regulatory requirements; and address community and port needs.

- e. Building an investment grade financial strategy and a financing coalition to fund port infrastructure projects. This strategy should identify the optimal funding sources for each project/component and encourage joint ventures and public/private partnerships as appropriate. The financing coalition should be as broad as possible, possibly including private banks/investment firms, the port authority, port terminal operators, and Municipal/MPO/State/Federal funds.
- f. Following proven project delivery strategies to devise the plan to acquire and oversee the infrastructure project, to include risk mitigation strategies to maintain the project cost and schedules and to sustain port operations while the construction or system is put in place.