Strategic Plan

Presented to:
Mid-America Regional Council and Kansas City SmartPort

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Overview
The Kansas City Regional Freight Outlook (RFO) was prepared to sustain existing momentum and further expand the region’s presence in transportation and logistics. The overall vision for the Kansas City RFO is to positively impact and accommodate the growth of freight transportation and logistics in the 18-county study area.

The Mid-America Regional Council and Kansas City SmartPort initiated the Kansas City Regional Freight Outlook. The Kansas City RFO was developed in collaboration with the Kansas and Missouri Departments of Transportations.

The overall study included a series of deliverables focused on identifying freight infrastructure needs and assessing Kansas City’s regional transportation advantages, resulting in targeted strategies and messages for the region. The following list details each of the study deliverables:

- **Freight Directory**: Inventory of the region’s 40 freight zones including modes, volumes, existing industries and presence of foreign trade zones
- **Business Survey**: Summary of 427 survey responses of businesses on freight topics important to the region
- **Focus Group Summary**: Major findings from five focus groups conducted with the general public, business and elected officials
- **Freight Infrastructure Investment Plan**: Focuses upon transportation infrastructure by freight mode and provides a set of transportation priorities for the region.
- **Regional Freight Assessment**: A comparative of assessment of Kansas City against other cities in the U.S. in terms of freight activities and site selection characteristics.
- **Freight Flow Analysis**: A summary of the volume and value of freight flows in, out and through Kansas City by truck, rail, air and barge.
- **Freight and the Environment in Kansas City**: A brief white paper on environmental topics related to freight and the region.

Using the data and research from each element, a series of findings are outlined that help inform the Strategic Plan development. This Strategic Plan draws on the data and research completed as part of the overall Kansas City RFO elements related to infrastructure, freight flows and economics to create objectives, strategies, and tactics that support the regional vision. The freight Strategic Plan was created to help the region remain a vital national freight transportation hub attracting freight growth.

Finally, the Kansas City RFO Summary is a culmination of all the work completed on each individual element. The summary provides an overview of the study effort, information on infrastructure and freight flows, as well as, a summary of the surveys and comparative cities analysis. Key recommendations and critical actions are provided to narrow the focus on the near term and help to initiate and maintain the regional vision to positively impact and accommodate the growth of freight transportation and logistics in the 18-county study area.
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**Introduction**

The Kansas City region has distinguished itself as a center for transportation and logistics-driven business over the last several decades. This reputation was built on the strong transportation infrastructure and business climate that exists in the 18-county study area. In an effort to sustain this momentum and further expand the region’s presence in transportation and logistics, the Mid-America Regional Council (MARC) and Kansas City SmartPort initiated the Kansas City Regional Freight Outlook (RFO). The KCRFO was developed in collaboration with the Kansas and Missouri Departments of Transportation (KDOT and MoDOT).

Exhibit 1. Study Area

Source: TranSystems.

The Kansas City RFO is intended to guide and manage the anticipated growth of freight in the Kansas City region. This Strategic Plan draws on the data and research completed as part of the overall Kansas City RFO elements related to infrastructure, freight flows and economics. It also provides an assessment of industry and user input.

**Element 1: Freight Infrastructure Investment Plan**

The Kansas City region has an extensive highway and rail network complemented by river and air cargo access. This infrastructure and the facilities that operate in the region provide the network on which business functions. This element discusses the investment needed to sustain and grow the network.

**Element 2: Profile of Freight Flows and Economic Analysis**

Understanding existing freight flows, historic trends and projections helps to identify and target economic growth areas for retention, recruitment, and expansion. Economic analysis provides information on the impacts and benefits of freight investment in the region.

**Element 3: Regional Freight Assessment**

The regional assessment considers a business survey, focus groups, comparative cities analysis and a SWOT (Strengths Weaknesses Opportunities Threats) analysis. Together, these analyses help assess freight-related qualities and characteristics that make the region attractive to new or expanded businesses.
Using the data and research from each element, a series of findings are outlined that help inform the strategy development.

**Background**

Kansas City began its freight planning efforts in 1995 with the completion of the Intermodal Freight Strategies Study (IFSS). That study laid the foundation for this strategic planning effort by developing the first list of strategies to strengthen the Kansas City region as a freight center and to expand the depth of economic benefits stemming from freight. Over the last decade significant progress has been made on the IFSS strategies which are outlined below.

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<tr>
<th>Strategy</th>
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<td>Aid the freight community in developing focused, cooperative programs that lead to a more efficient transportation system.</td>
<td>Create a Heartland Transportation Alliance and Freight Authority</td>
<td>This strategy was accomplished through the development of Kansas City SmartPort.</td>
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<td>Foster public-private partnerships between the freight transportation industry and governmental entities to address institutional and infrastructure issues.</td>
<td>Institutionalize freight transportation planning, coordinate industry efforts and development, and implement processes to solicit industry input.</td>
<td>This strategy is an on-going process. MARC has focused on goods movement in their Long Range Transportation Plan and the Goods Movement Committee was also formed to solicit industry input. Kansas City SmartPort provides input into the freight planning process as well.</td>
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<td>Generate public and private investments that reduce the cost of moving goods and that enhance the region as a state-of-the-art freight transportation technology center.</td>
<td>Encourage maintenance and improvement of infrastructure, be a leader in freight mobility and educate regulatory agencies.</td>
<td>This strategy is in process through the development of the Trade Data Exchange (a relevant version of an international trade processing center); a result of the Mid-Continent TradeWay Study. KC SmartPort is well recognized because of these efforts.</td>
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<td>Market regionally, nationally and globally the area’s freight transportation capabilities and potential in ways that support existing area businesses and that attract new companies.</td>
<td>Promote location, service, and capacity. Expand knowledge and update data.</td>
<td>This strategy has been significantly accomplished, and at the same time it is still an ongoing process. Because of the efforts of Kansas City SmartPort, Kansas City has become a recognized leader in freight capabilities as evidenced by its intermodal facilities and expanded warehouse assets. There is a great opportunity for the region to enhance its freight data resources.</td>
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<td>Marshall the necessary resources to implement the strategic plan.</td>
<td>Seek industry contributions, advocate for legislative and regulatory action and monitor implementation.</td>
<td>This strategy has been accomplished through KC SmartPort’s efforts to grow and sustain its investor base. Significant Federal Grants have also been secured to fund necessary programs that enhance Kansas City’s standing as a freight center.</td>
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Source: TranSystems.

On a broader platform, freight has moved into an important role in institutional planning since federal surface transportation legislation (ISTEA, TEA-21 and SAFETEA-LU) emphasized freight as an integral part of transportation planning. In 2006, a draft National Freight Policy Framework was set by the Federal Highway Administration to ensure the efficient, reliable, safe and secure movement of goods and to support the nation’s economic growth while improving environmental quality. The goal of this framework is to position it as a National freight policy rather than a Federal one. The national freight system is a huge asset and as such, it must continue to be maintained through both public and private investment initiatives. Maintaining and enhancing infrastructure is of utmost importance and this Policy Framework establishes strategies to help promote infrastructure investment.
Following suit with federal legislation and initiatives, MARC has included a goods movement element in their Long Range Transportation Plan (LRTP), as well as the other metropolitan planning organizations within the RFO study boundaries: St. Joseph, Lawrence/Douglas County and Topeka. Transportation of freight by air, barge, rail and truck is fundamental to the “quality of life” in the Kansas City region because these services impact the regional economy. Strategies promoting freight are infrastructure focused and one goal of the region is to locate freight assets at appropriate locations. This is achieved by locating freight facilities where various modes of transportation intersect increasing the safety, reliability and efficiency of these systems. To effectively facilitate the region’s continued success in freight transportation, the goals of Transportation Outlook 2040 will be incorporated into the freight planning process.

Although KC SmartPort is not a mandated agency for the region’s freight planning efforts, this organization plays an active and important role in strategic planning. SmartPort’s efforts center on economic development in which the focus is to grow the transportation industry in Kansas City by attracting businesses with transportation and logistics elements. Since being established in 2001, Kansas City SmartPort has become well-recognized nationwide and has become the region’s “go-to” agency for transportation and logistics. One goal of SmartPort is to make Kansas City more efficient and secure for companies wishing to move goods to and from the region. The 1998 Mid-Continent TradeWay Study reinforced this reality and emphasized the need for Kansas City SmartPort.
Summary of Findings

These findings help us develop the strategies that will formulate the Regional Freight Outlook. The findings are divided into three areas: infrastructure, freight flows, as well as industry and user input. These three areas were the focal point of extensive investigation in many facets of freight in the Kansas City region. The overall assessment of the findings show that the region has a strong and committed focus to providing the best environment for freight-based business.

Freight Infrastructure Investment Plan

The freight-infrastructure element is directly related to the location of freight activities such as manufacturing and distribution. Forty locations or zones were identified in the region because of their concentration of freight activity. The freight zones are locations that consist of top manufacturers and top warehouse and distribution centers. These zones are served by the region's extensive transportation network and often by many modes. The location of the region's Foreign Trade Zones had a direct influence in determining the locations of the forty zones. Access to the transportation network, along with mobility along the corridors can influence which zones have a higher degree of activity.

The region's freight corridors are significant at many levels. Numerous corridors serve as part of the national freight transportation system. These include Interstate facilities (at nearly 440 miles) with high truck traffic volumes as well as rail corridors (at nearly 800 miles) with high train volumes, tonnage and value. Regional and local corridors are classified in a similar manner by truck and train volumes.

Growth in truck vehicles miles traveled (VMT) is expected to continue to increase. The region's national freight system is estimated to carry approximately 70% of truck VMT. Historic trends indicate a high rate of growth which should be monitored.

The safety of the region's freight-related transportation network is also important. Review of data on incidents involving "big rigs" from KC Scout indicates that big rig incidents on average account for approximately 7% of all incidents, yet they represent approximately one-third of the level 3 incidents, which are defined by duration in excess of two hours. This illustrates the relationship that safety has upon the quality of mobility.

Freight transportation is equally affected by the conditions that diminish the quality of travel, from operational conditions such as congestion and safety to physical conditions, such as pavement (or rail) and bridges. Rail transportation has a direct interface with roadways at its at-grade railroad crossings which can have an impact mobility on roadways. The region has more than 1,000 public at-grade crossings.

When reviewing other attempts to prioritize freight projects, common themes emerge:

- Available data is limited or difficult to collect on a system-wide basis, nonetheless the freight system's performance must be measured;
- The economics of freight-related business should play a role in prioritizing projects, with the use of corridors as one method to establish a hierarchy; and
- Goods movement stakeholders should be involved in the process and decision-making while institutionalizing freight into the transportation planning process.

Significant progress has been made in the region's freight-related infrastructure. This is an indication current infrastructure investment decisions are appropriate and support and enhance goods movement. Nonetheless, the region should acknowledge the investments made that maintain the overall system as well as specific goods movement projects along the corridors of freight significance. The region also needs to improve upon the collection and assessment of data related to goods movement.
Profile of Freight Flows

This element is important to promote greater understanding of where the region can most effectively influence economic growth and analyze how that growth will impact the region. The study region handled a total estimated volume of freight equal to 291 million short tons in 2007 with an estimated total value of $826 billion.1

The Kansas City region has a significant volume of truck freight driven by local industry, local distribution, regional distribution, movements through the region and international trade. In 2007, the study region had an estimated 214 million short tons of truck freight (domestic plus cross-border) with an estimated total value of $722 billion. The region is dominated by through truck movements along the national corridors followed by shipments out of the region. Mexico cross-border truck freight has the highest value per cargo ton of the different truck freight sectors.

Domestic truck freight includes two important higher value commodity sectors that are handled by the study region’s warehouse and distribution facilities, and intermodal rail infrastructure. Higher value products handled by warehouses and distribution centers (Secondary Traffic Warehouse & DC: mainly consumer goods such as apparel, footwear, electronics and furniture) accounts for 14.2 percent of total domestic truck tonnage and 43 percent of the total value of domestic truck cargo. Containerized products moving by truck drayage to/from intermodal rail yards (Secondary Traffic Rail Intermodal Drayage) account for 4.3 percent of total domestic truck tonnage and 14 percent of total value of domestic truck cargo.

The Kansas City region is one of the nation’s leading rail hubs and handles a broad variety of rail freight. In 2007, the total estimated volume was 72.2 million short tons of rail freight (domestic including coal plus cross-border) with an estimated value of $100 billion. Through rail volumes add approximately 650 million tons to this total.2 The volumes of inbound and outbound rail traffic are nearly equal when coal is excluded. Movements of intermodal cargo to and from the Los Angeles area account for 48 percent of total intermodal rail tonnage identified for the study area. The major commodity originating from this area, accounting for 88 percent of eastbound tonnage, is high value Miscellaneous Mixed Shipments (mostly freight-all-kind (FAK) which tends to be international imports from the ports of Southern California). The major commodities destined for the Los Angeles BEA are Miscellaneous Mixed Shipments (45 percent of tons) and Transportation Equipment (17 percent), as well as Food or Kindred Products (13 percent) and Farm Products (10 percent). The major lanes handling carload rail traffic are with the Dallas, St. Louis, and the Detroit areas. Higher value commodities moving by carload include Transportation Equipment (for example, motor vehicles, and vehicle parts and accessories).

Air freight accounts for a small component of the overall freight universe, the sector involves the shipment of small volumes of higher value products. In 2007, the study region’s total air freight amounted to 126,000 short tons with a total estimated value of $1.85 billion. The greater value of outbound freight reflects the shipment of higher value products, notably Miscellaneous Manufactured Products (jewelry, precious metal, etc.); this commodity group accounts for 16 percent of outbound tonnage and 58 percent of outbound value.

The river system of the study region handled 4.9 million short tons of water freight in 2007 with an estimated total value of $0.6 billion. Major outbound commodity groups were Nonmetallic Minerals, Waste or Scrap Materials, and Farm Products.

The Kansas City region is one of the nation’s leading transportation hubs with an established transportation infrastructure supporting freight moving by truck, rail, air and water in domestic and international trade lanes. The infrastructure encompasses highways, rail lines, rail yards, warehouse and distribution centers, and other facilities. A large quantity of higher value/processed commodities is handled by the region’s warehousing and distribution

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1 Through rail volumes are not included in this total. In 2006, approximately 650 million tons of through rail cargo traveled on the region’s railroads.

2 Since data for through rail is from 2006 and data for inbound/outbound is 2007, through rail volumes are listed separately.
centers, intermodal rail yards and other facilities. The projected increase in freight over the next 20 years, with the higher value/processed commodities growing fastest, along with general industry trends suggest the region’s positive momentum will continue into the future.

To remain a leading transportation hub, the region must continue to invest in the maintenance and expansion of its freight handling infrastructure. Many shippers are interested in locating in close proximity to rail intermodal facilities with good highway access. This supports the importance of investment in the region’s rail and highway infrastructure. Additionally, potential future modal shifts from truck to rail due to long term increases in energy costs, highway congestion and other factors would result in faster growth of regional rail freight than projected in this study and support greater investment in rail-related infrastructure.

Projected growth of higher-value/processed commodity sectors indicates that future investment should include the provision of facilities and services suited to these types of commodities. In addition, the faster growth of some cross-border trades compared to domestic freight indicates that emphasis should be placed on the development of facilities, services, technologies and security to support international trade flows.

Kansas City has the potential to grow as a location for component assembly and light assembly in established industries like the automotive, aircraft and agricultural machinery manufacturing sectors. Although recent economic conditions have resulted in contraction in these industries, they still represent a major component to our national economy and regionally represent a substantial number of jobs. Near-term growth in these industries will be slow but Kansas City has the potential to benefit from reinvention in these industries necessary for long-term success. Near sourcing raw material and component parts from the industrial areas of Northern Mexico through the rail connection via the Kansas City Southern de Mexico to the Monterrey, Mexico region provides a very significant opportunity to take advantage of near sourcing machinery parts for final assembly by the region’s skilled workforce. Leveraging the region’s manufacturing history and base can position Kansas City to capitalize on emerging “green” industries including components and finished products for green energy technologies such as wind and solar power, as well as, advanced transportation and battery technology.

Regional Freight Assessment

As part of this element, over 400 surveys were completed by industry to provide input on freight movement in the region. As a follow up to the survey, a series of focus groups were conducted with a broader audience including elected officials, city/county staff and the general public, to understand more in-depth issues related to freight infrastructure, development, investment and education/awareness. Finally, this element was rounded out with a comparative cities analysis which compared Kansas City to four other markets to better understand how Kansas City can define itself and determine how to expand its growth in freight-related development.

A majority of the survey respondents, who represent five major areas of industry: agricultural, manufacturers, wholesalers/retailers, transportation/warehousing, and professional service providers; were optimistic about growth of the Kansas City market despite current economic conditions. This optimism is consistent with results of past surveys that targeted a similar audience. In 1995, 88% of businesses expected to see some growth, now in 2008 64% expect to experience “some growth.” The most recent numbers are likely due to the recent economic conditions.

During the focus groups, nearly all of the participants, regardless of their background, acknowledged that freight transportation and logistics are important to our regional economy. However, the participants who were not directly working in industry had low levels of awareness of freight topics. This varying knowledge base creates challenges when new initiatives or projects come to the region. Most participants indicated that they were more supportive of initiatives and projects when they were educated on the topic or had specific and targeted information. This finding affirms the importance of the Regional Freight Outlook as it provides some of the detailed information desired by these groups and it continues past efforts to coordinate regional planning for freight and economic development.
Most of the focus group participants felt that the overall quality of the region’s transportation infrastructure is good. Kansas City’s strong intermodal infrastructure, including four Class I railroads, five truck/rail intermodal facilities, express air cargo availability and three interstate highways, helps the region remain competitive to transportation and logistics-based businesses. The survey respondents indicated that the most important transportation service in the region for all business segments is truck. Kansas City’s truckload rates are also lower than comparative cities reinforcing that the region’s central location and connectivity are positive indicators for truck-dependent shippers.

Survey respondents also reported that the quality of truck-based transportation service is high, with over 85% stating that availability and reliability are excellent or good in this market. There were no current concerns with highway access or height/weight restrictions on bridges in the region; and travel time during off-peak hours (the time when most trucks travel) was rated excellent or good by over 80% of respondents. Even though current conditions are good, focus group participants indicated that future investment will be needed to maintain the region’s overall quality that exists today.

A high-level assessment of 27 cities was completed to understand how Kansas City compares to major national markets as well as comparative markets and regional competitors in terms of freight activities. From this broader analysis four cities were selected for a more in-depth review: Nashville, Indianapolis, Dallas and Columbus. A competitive assessment of these four cities was performed to determine how the Kansas City region competes in freight activities. Understanding how the region competes will help to position the region and promote Kansas City’s freight-intensive assets.

Typically, when businesses choose to locate in Kansas City several other cities are considered. A variety of criteria is used to identify suitable locations for freight-related development including market coverage, truckload shipment cost and rail connectivity. Other criteria that are used include: labor availability and quality, building lease rates, tax rates and availability of infrastructure. The comparison completed for the Kansas City RFO relied on data from a variety of sources – the census, state and local governments, and commercial data sources. Once the data was assembled, a weighted scoring system was used to rank the locations. The results of the analysis reveal that Kansas City ranks behind Dallas and ahead of the three other cities. The results reveal that Kansas City has strengths in several areas including transportation costs, rail facilities, availability of labor and low cost of living. These are some of the top criteria for businesses looking for suitable locations for freight-related development.

The overall conclusion from the survey and focus groups was that freight transportation and logistics are important to Kansas City and maintaining a competitive edge will be important to stay ahead of the competition. Leveraging Kansas City’s strengths and building on opportunities will help maintain the momentum that exists and keep the region competitive. Kansas City’s low truck shipment costs, extensive rail connectivity, labor availability and low cost of living are all strengths for the region. These are some of the top selection criteria for businesses looking for suitable locations for freight-related developments that need to be promoted.

The region must also leverage the construction at the proposed and recently opened intermodal facilities as that presents an opportunity to reduce lease rates since current rates are high due to low vacancy. Kansas City’s relatively high labor cost may be driven down by the high employment rate in the region. Companies that must hire skilled labor may look to Kansas City because of the region’s abundance of workers that may accept lower compensation rather than being out of work.

Initial Conclusions
As in past freight strategic planning efforts undertaken by the Kansas City region, this effort has concluded that focus should not be placed solely on infrastructure planning but also on addressing economic development, marketing efforts, and stakeholder perceptions. There are numerous overlapping findings from each of the elements included as part of the Kansas City RFO. This reinforces the message that the region’s freight system must be viewed holistically and not only from one point of view. This not only provides a more complete vision but balances the needs and
perspectives of all involved. The following findings are a summary of the overlapping findings that drive the development of the region’s strategic plan:

- **Freight is a part of an even larger transportation system.** Much of the region’s transportation infrastructure needs are driven by peak hour congestion related to passenger vehicle travel. However, the mobility and accessibility of freight is a vital component to our region’s economy and should be acknowledged and accommodated in the transportation planning process.

- **The region’s network is diverse, accessing all transportation modes.** Truck, rail, air and river modes are available to shippers and provide a competitive advantage for our region. This diversity in transportation options is an asset that should be preserved and actively maintained so the region remains competitive.

- **The economic impacts of freight are extensive.** The 18-county study region’s 2007 Gross Metro Product (GMP) was $426 Billion. The value of goods shipped from our region equals 59% of the GMP. The value of goods shipped to our region equal 41% of the GMP. This shows that our region’s economy is highly integrated with transportation and logistics.

- **Communication and coordination are essential to advancing freight transportation planning.** The region has laid the foundation for active dialogue on freight transportation through establishing Kansas City SmartPort and MARC’s Goods Movement committee. The KCRFO has confirmed that the dialogue must continue and new channels of communication should be developed to inform and coordinate as growth continues.

In summary, the Kansas City region must continue to look at the big picture and support not only highways and railroads but investment in efforts to grow transportation and logistics business while balancing the needs of the community and freight interests.

**Regional Freight Outlook Report Card**

This Report Card seeks to inform regional partners about the state of freight in the 18-county region. The Kansas City region has made significant strides over the last decade in integrating freight into regional planning and economic development. Both the public and private sector has been engaged and has helped to achieve the positive results. The following report card outlines nine major categories that are relevant to freight and provides a rating for each category. The report card is shaped like a wheel, which metaphorically relates to transportation, yet it goes beyond just freight movement to encompass the elements of economic development and the environment.

- **Freight Infrastructure Capacity:** The region’s significant national highway corridors have capacity available to accommodate continued growth in truck freight. Major improvements to bottlenecks on the region’s rail network have been completed over the last decade to improve capacity. Air cargo service and facilities are available to accommodate any future growth for this mode. The Missouri River has a limited navigation season but the region’s port infrastructure is operating with abundant capacity.

- **Modal Availability:** All four transportation modes – truck, rail, air and barge – are available to shippers in the region. The truck and rail modes have a significant presence in the region and are supported by the availability of air and barge service.

- **Planning:** Freight is well integrated in the Kansas City metropolitan planning process. The KCRFO is the third major freight study conducted in the region in the past 10 years.

- **Freight Volumes:** A freight volume equal to 291 million short tons in 2007 with an additional 650 million short tons of through rail volume shows that the region has a significant nexus of freight-based activity.

- **Competitiveness:** Kansas City is highly competitive with cities of comparable size. The results reveal that Kansas City has strengths in several of the top criteria for businesses looking for suitable locations for freight-related development.

- **Business Attraction:** The region has attracted numerous warehouse, distribution center, third-party logistics providers and transportation business expansions and openings in the last decade. This is a featured industry for the region’s economic development agencies and remains an important focus into the future.
Partnerships: The public and private sectors have joined together in several forums to coordinate efforts and build projects to impact the region. MARC’s Goods Movement committee has active participation by private business leaders, government officials and community representatives. Moreover, Kansas City SmartPort has investors from private companies, government agencies and service providers. Public Private Partnerships have built railroad grade separations to remove major bottlenecks and public agencies are making significant investments in infrastructure to support private investment in freight facilities.

Technology: Kansas City SmartPort’s Trade Data Exchange, the Cross-Town Improvement Project, and the KC Scout Traffic Management System are all technology-based solutions that are designed to facilitate and improve the region’s freight transportation system and economic development. The region is also making strides to monitor safety and improve incident management through KC Scout’s technology system.

Environment: The region has recently begun to place more focus on environmental issues related to freight and is working to encourage a dialogue to promote environmentally-conscious freight transportation while creating balance between environmental needs and the needs of the freight community.

Exhibit 3. Regional Freight Outlook Report Card
Regional Freight Outlook Strategic Plan

The Strategic Plan acts as the region’s guide through the next planning phase focusing on the critical actions to implement immediately. The plan uses a framework built upon the Mid-America Regional Council’s Transportation Outlook 2040 and Kansas City SmartPort’s mission. The framework follows a distinct methodology so that it clearly outlines the steps that the region should take to realize the overall vision.

Definitions

A strategic plan starts with an overall vision that describes the ideal outcome of the effort undertaken. The vision guides the development of objectives that outline what needs to be accomplished to attain the vision. Strategies are put forth to obtain the objective with specific tactics that represent the actions to be carried forward.

The overall vision for the Kansas City Regional Freight Outlook is to positively impact and accommodate the growth of freight transportation and logistics in the 18-county study area. This vision sets the tone for the overall strategic planning process.

Exhibit 4. Strategic Planning Process

Objective: What the region wants to attain

Strategy: Plan to obtain the objective

Tactic: Specific actions to carry out

Source: TranSystems.

To develop the specific objectives for the KCRFO, Kansas City SmartPort’s three main initiatives (economic development, Trade Data Exchange and business services) were reviewed with specific focus on the economic development initiative:

- Economic Development: Focus on attracting and retaining investments from companies with significant transportation and logistics elements such as distribution centers, warehouses, third-party logistics providers, and manufacturers.

Additionally, four relevant policy goals from the MARC Transportation Outlook 2040 Policy Framework were reviewed:

- System Performance: Manage the system to achieve reliable and efficient performance
- Economic Vitality: Support an innovative, competitive 21st-century economy
- Environment: Protect and restore our region’s natural resources (land, water and air) through proactive environmental stewardship
- Climate Change & Energy Use: Decrease the use of fossil fuels through reduced travel demand, technology advancements and a transition to renewable energy sources
These initiatives and policy goals were rolled up and modified to directly address the KCRFO vision as the following objectives:

- Improve goods movement system performance
- Support transportation and logistics business attraction and retention
- Contribute to ensuring the region’s quality environment

Each objective is supported by several strategies that outline the steps to achieve the objective. The strategies are then supported by specific tactics or actions to carry out. As a further step, each tactic is supported by the mechanics of implementation including specific measurements and the time period for those measurements. Additionally, the party responsible for conducting the measurement is identified. The results of these measures create a feedback loop assessing whether the strategy is achieving the desired results. The feedback loop is discussed in two categories; as outcomes and as success indicators. The outcomes are further divided into groups of data, which are suitable for trend analysis at a system level or providing material unique to a specific application. Exhibit 4 outlines the strategic planning process and Exhibit 5 provides the implementation process for each of the tactics including the mechanics, responsible party and the desired feedback.

**Exhibit 5. Strategic Planning Implementation Process**

The Strategic Plan

**OBJECTIVE 1: IMPROVE GOODS MOVEMENT SYSTEM PERFORMANCE**

The overall objective is to improve the goods movement system performance across all modes. Three strategies discuss maintaining and preserving freight-related infrastructure by conducting corridor assessments, enhancing safety, and addressing specific freight-related needs.

**Strategy 1A: Maintain and preserve goods-moving infrastructure (Corridors of Freight Significance)**

This strategy relies on defining the goods movement transportation system for all modes and conducting high-level as well as specific corridor assessments to ascertain the current state of the system, and through periodic review, determine if this objective is being met.

**Tactic: Conduct Corridor Of Freight Significance (COFS) Assessment**

Three classifications of corridors applicable to all modes are defined for the region: National, Regional and Local. Some classifications include all modes of goods movement while some modes are not applicable to each classification. Each Assessment should review physical condition, usage of the system network, safety and a mobility index to help identify freight-specific improvements or opportunities. The types of measurements vary depending upon the level of corridor classification, as well as the availability of the data.
National Corridors
Only the highway and rail modes apply to this classification. The highway’s physical condition is proposed to be assessed by pavement ratings and bridge ratings available from the DOTs or agencies that have jurisdiction over the roadway. The physical conditions ratings should be reviewed on a set timeline, such as every five years, to better identify what changes need to occur over time. Physical condition of the rail system should be discussed with the operating railroad and the DOTs to determine if the conditions meet acceptable standards. Usage can be measured by truck vehicle miles traveled (VMT) and by number of trains or million gross tons (MGT) on rail lines. Usage should be assessed annually as this data is more readily available and applies to a larger segment. A safety and mobility index for highways should be developed in partnership with KC Scout as much of the national corridor system is the network monitored by the KC Scout system. While KC Scout does not encompass all of the freight-related corridors of national significance, it is substantially complete and the KC Scout system will continue to grow covering even more of the freight system. This also allows for integration with KC Scout’s technology and monthly reporting system. The Federal Railroad Administration provides information on crash data along the region’s rail lines and a region-specific safety index can be built from this information.

Regional
Only the highway and air cargo modes apply to this classification. As with the National corridors, the highway’s physical condition is proposed to be assessed by pavement ratings and bridge ratings reviewed on a set timeline. Air cargo physical condition is more difficult to measure but could be seen more as an operational measure like number of cargo carriers present and destinations served. Landside access to air cargo facilities is also a key measure of physical condition. Highway usage will again be measured annually by truck vehicle miles traveled (VMT). Air cargo usage can be measured by tonnage as reported by the individual airports; KCI provides monthly statistics for easy tracking purposes.

A specific focus on conducting highway-corridor specific assessments along the approximately 400-mile long Regional network (that in many cases is parallel or adjacent to rail and river corridors, as well as providing access to air cargo terminals) is recommended. These corridor assessments could be part of the Goods Movement committee’s work plan and include review of up to 40 miles of Regional corridors each year prioritized based on location, new development potential or deferred maintenance needs. Taking a corridor approach also allows for the integration of industrial land use issues into the analysis.

Local
All modes apply to this classification. The highway’s physical condition is proposed to be assessed by pavement ratings, as well as travel lane and shoulder widths and bridge weight limits and structural ratings. Physical condition of the rail system should be discussed with the operating railroad and the DOTs to determine if the condition meets acceptable standards. The physical ratings could be reviewed every five years. Usage can be measured by truck vehicle miles traveled (VMT), by number of trains or million gross tons (MGT) on rail lines by air cargo tonnage and by barge tonnage. Usage data may not be as readily available at this level but an effort should be made to systematically collect this data and update on a reasonable timeline, perhaps every two to three years.

Strategy 1B: Enhance Safety
This strategy envisions monitoring the region’s safety as it relates to goods movement along and across the region’s transportation network.

Tactic: Monitor safety rates and trends
While the focus will likely be on truck accidents along the region’s highways, vehicle and train accidents should also be monitored. A myriad of safety data exists in the region in various formats and from numerous sources; therefore, it is important to establish an initial baseline data set with an understanding of seasonal
variations before determining applicable “standards” or suggesting actions to modify trends. The safety analysis would aggregate to the system-wide freight network described above. Initially, the annual assessment would rely upon KC Scout for the corridors of national significance. Over time the database should develop for the entire freight corridor network.

Tactic: Manage hazardous cargo exposure
Any accident by any mode that involves hazardous cargo should be recorded. The reporting of hazardous cargo incidents will need to coordinate with the first responders regarding the type of critical and applicable data. The data will be used to assess whether the incident could be deemed “correctable” by any improvement measures. For many of these reports, elements of the management of the incident (detection, response, recovery) may be the only applicable data.

Strategy 1C: Address Freight Specific Needs
This strategy seeks to collect appropriate data to assess freight-related needs, engaging in dialogue with stakeholders and determining the region’s investment in goods movement infrastructure.

Tactic: Collect freight data, develop tools and conduct research
While a commercial vehicle Origin-Destination (O-D) survey has recently been conducted in the MARC region, the data may be limited as the survey period was for only 12 hours. Truck counts on the national corridors indicate that half of daily truck traffic occurs during the period from 6 PM to 6 AM. Consequently, an expanded truck O-D survey along critical corridors to encompass a complete 24-hour period would benefit the region. An expanded O-D survey would be a key component to updating the region’s travel demand model to provide information regarding the location, distribution and assignment of truck trips. A truck travel demand model is a valuable tool for monitor freight movement over time.

Commodity data is expensive and cumbersome to process but provides valuable information on the shipment trends and types of freight movements in the region. Commodity data should be collected on a periodic basis, approximately every five years, for review by the region. Further, the acquisition of commodity data should be coordinated with the Kansas and Missouri DOTs in an attempt to achieve economic efficiencies.

Tactic: Invigorate dialogue with stakeholders
While continuing coordination with the two state DOTs on various freight-related issues, MARC’s Goods Movement Committee should meet on a regular basis (at least quarterly) to review the mobility and safety data reports as well as the status on the Regional corridor assessments. It is likely that review of the data will identify new issues that will require further analysis or recommendation for an improvement project.

KC SmartPort can assist by providing a true “regional” perspective with businesses outside MARC’s boundary and include coordination with planners in the Lawrence-Douglas County and Topeka MPO’s in Kansas as well as the St. Joseph MPO in Missouri. Much of the data being discussed above will also provide good information to be turned into communication messages, including key phrasing recognizing the region’s qualities and achievements.

Tactic: Create annual checklist of the TIP and LRTP for freight benefits
The checklist approach allows for recognition of the region’s investment in transportation that is associated with general as well as specific freight-related transportation improvements. Projects should be cross-referenced for proximity to a freight zone as well as being along or adjacent to a corridor of freight significance. The intent is to recognize and monitor the region’s investment in its infrastructure with a specific focus upon goods movement.
Having a specific checklist year-to-year will keep focus on freight transportation needs and provide support to jurisdictional agencies in their efforts to identify funding and create solutions. In addition to projects that are currently listed on the TIP, on-going studies or non-infrastructure projects that promote transportation solutions should be added to the checklist to add additional support to other regional initiatives that benefit freight.

OBJECTIVE 2: SUPPORT TRANSPORTATION AND LOGISTICS BUSINESS ATTRACTION AND RETENTION
The overall objective is to attract freight-related business in the region and to continue making a significant contribution to the region’s economy.

Strategy 2A: Continue to support organizations and initiatives that attract, retain and assist transportation and logistics businesses
This strategy focuses on KC SmartPort and the Trade Data Exchange.

Tactic: Continue to invest in KC SmartPort
Over the last decade KC SmartPort has taken the lead for the 18-county region in promoting economic development and infrastructure improvements focused on the transportation and logistics sector. Investment in the agency has come from public and private interests. SmartPort continues to be the leader in connecting both sectors and promoting a strong image of Kansas City outside of the region. Continued investment in this agency will benefit the region by continuing efforts to attract new and emerging freight-based business, warehouse/distribution centers, and efforts to identify solutions to business needs related to transportation.

Tactic: Continue to invest in the Trade Data Exchange
Investment in the continued development of the Trade Data Exchange (a relevant version of an international trade processing center) will also benefit the region by emphasizing Kansas City’s importance in global supply chains.

Strategy 2B: Increase regional awareness of the important role of freight-related industry
This strategy will assess the contribution freight-related activities make to the region’s economic vitality.

Tactic: Review key economic indicators
A review of key indicators that could include data such as employment, payroll or Gross Metro Product, would allow the region to track success and monitor change over time. An annual report of this information to MARC's Goods Movement Committee and KC SmartPort investors would show how investment over time in the KCRFO strategies impacts the region.

Tactic: Build community support for improved freight transportation
Communities that support freight transportation are more likely to attract and retain freight-related business. The region’s communities can show their willingness to bring in business by streamlining development reviews, supporting regulatory changes and promoting coordinated and innovative financing. The region’s freight players – MARC and Kansas City SmartPort – must continue to do their part in educating and demonstrating the economic and environmental benefits of freight to build that vital community support.

Strategy 2C: Externally promote the region’s competitive strengths
This strategy focuses on maintaining competitiveness and increasing regional productivity.

Tactic: Leverage proposed and recently opened intermodal facilities
Few regions with similar market size can boost two new rail-truck intermodal facilities and one new air-truck intermodal facility. Rather than competing with each other, these three intermodal facilities may actually
complement each other creating a greater impact to the region than if only one were opening here. The cost advantages presented to shippers when multiple modes, trade lanes and geographic locations are available will make the three facilities a distinct asset of the region and should be promoted as such.

Tactic: Innovate marketing efforts by emphasizing the competitive advantage of the region illustrating the top differentiators – low transportation costs, strong intermodal infrastructure, speed to market, steady regional growth and central location for parcel shipments – will uniquely position the region’s competitive strengths. Utilizing websites, marketing collateral, relationships and industry showcases will bring attention to the region’s differentiators and inform external contacts of the attractive qualities of the region.

Tactic: Focus business attraction efforts on emerging industries while sustaining existing industries Kansas City is in the position to capture new opportunities in emerging “green” industries especially advanced transportation and battery technology. Based on the region’s skilled workforce, unique connections to Mexico and strong history in manufacturing, capturing business from the innovations underway in establish industries like automotive, aircraft and agricultural machinery will be an opportunity.

**Strategy 2D: Provide facilities and services suited to handle high-value/processed commodities**
This strategy helps maintain the current momentum in attracting warehouse and distribution facilities.

Tactic: Increase inventory of modern facilities
Kansas City’s modern warehouse and distribution center inventory is limited. Therefore, to attract businesses that handle high-value/processed commodities, new, high-tech and flexible facilities must be available. Kansas City SmartPort, as the region’s economic development agency for transportation and logistics, must work with its development partners to appropriately increase the inventory of modern facilities. The current state of the economy indicates that this tactic should be pursued cautiously but efforts should still be made to plan for these types of facilities.

**Strategy 2E: Encourage access to diverse employment opportunities**
This strategy is to ensure that access is provided to freight-related jobs.

Tactic: Monitor transit service to freight zones
Transit access via bus routes is provided to many areas of the region allowing employees to access jobs within a reasonable timeframe and cost. However, access to industrial areas where jobs may be available is limited either by no available service or limited service hours. Monitoring and promoting appropriately provided transit service to freight zones allows for more diverse employment opportunities to citizens in the region.

**OBJECTIVE 3: CONTRIBUTE TO ENSURING THE REGION’S QUALITY ENVIRONMENT**
The overall objective is for freight to make its fair-share contribution to ensuring a quality environment.

**Strategy 3A: Be a voice in the region’s discussion on Air Quality**
This strategy encourages the freight community to join the dialogue on regional air quality standards, measurements and regulations.

Tactic: Encourage dissemination of accurate Air Quality information
Freight transportation’s contribution to total national green house gas (GHG) emissions is reported at a level of approximately 10% of all emissions compared to passenger transportation at approximately 23%. Sharing accurate and meaningful data that supports overall regional efforts to improve air quality will help to strike a balance between environmental needs and the needs of the freight community.
Strategy 3B: Encourage sustainability
The region seeks a balanced approach with this strategy concerning growth in goods movement and implementation of environmental standards.

Tactic: Monitor and track environmental trends in the region that focus on freight
The building industry’s utilization of Leadership in Energy and Environmental Design (LEED) is one way that warehouses and distribution centers can bolster sustainability. Balancing new development with existing development so that it does not outpace reuse of existing sites is another way that region can positively impact land use and subsequently the built environment. The region should encourage the integration of “green” technologies, building designs and facility reuse subject to cost implications for the shippers and service providers.

<table>
<thead>
<tr>
<th>TACTIC</th>
<th>MECHANICS</th>
<th>RESPONSIBLE PARTY</th>
<th>FEEDBACK</th>
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<td>IMPROVE GOODS MOVEMENT SYSTEM PERFORMANCE</td>
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### Exhibit 6 (Continued)
#### Implementation of Tactics

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<td>Review key economic indicators and build community support for improved freight transportation</td>
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<td>Measure Employment, Payroll, Gross Metro Product</td>
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<td>Focus business attraction efforts on emerging industries while sustaining existing industries</td>
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<td>Increase inventory of modern facilities</td>
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<td></td>
</tr>
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<td>Number of new buildings</td>
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<td>Number of zones with service</td>
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<td>CONTRIBUTE TO ENSURING THE REGION’S QUALITY ENVIRONMENT</td>
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<tr>
<td>Encourage dissemination of accurate Air Quality information</td>
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<td>Occupancy Rates</td>
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</table>

Source: TranSystems.
**Critical Actions**

Each element of the strategic plan is important and will help influence success of the regional vision to positively impact and accommodate the growth of freight transportation and logistics in the 18-county study area. However, creating a manageable set of priority or critical actions to focus on in the near term will help to initiate and maintain the plan over time. The following list outlines the critical actions selected from the overall strategic plan that should become the region’s focus over the next 3 to 5 years.

- **Focus on transportation-related projects to identify and highlight freight-related benefits:**
  - Support infrastructure investments that indirectly improve freight transportation like interstate pavement replacement, guardrail installation or transit service to freight zones.
  - Support infrastructure investments that directly improve freight transportation like:
    - Widening MO-210
    - Building interchanges on Interstate 35 in southern Johnson County and connecting roadways that will serve the new BNSF intermodal facility and logistics park
    - Improving the Front Street Interchange on I-435
    - Actively supporting the conversion of US 71 to Interstate 49
    - Improving access along MO-150 and Botts Road
    - Improvements to the interchange at I-70 and I-435
  - Increase discussions with Class I Railroads to identify locations where grade separations would provide mutually beneficial results for the community and freight carriers.
  - Initiate discussions on potential public tools that could assist Class I Railroads with infrastructure investments like capacity improvements to the BNSF Missouri River Bridge in western Jackson County or the UPRR Kansas River crossing near Topeka.
  - Actively coordinate with agencies sponsoring corridor studies in the region so that the freight perspective is included from the start.
    - KDOT: I-35/I-435/K-10 Interchange Study
    - KDOT: Weigh Station Location Study
    - MoDOT: I-70 Studies: Statewide Truck Only Lanes, Jackson County Improvements, and the four state Corridors of the Future Study
    - MoDOT: Missouri River Freight Corridor Development Plan
  - Continue to advance non-infrastructure projects that impact transportation efficiencies for regional business.
    - SmartPort Pre-Clearance Facility (for US exports to Mexico)
    - Trade Data Exchange
    - Cross-Town Improvement Project
  - Encourage a dialogue among all stakeholders to promote environmentally-conscience freight transportation while creating balance between environmental needs and the needs of the freight community.

- **Expand the use of existing technologies and tools to monitor freight-specific data**
  - Encourage the expansion of KC Scout capabilities to monitor data on freight mobility (reliability) and safety.
  - Conduct a 24-hour truck origin-destination survey to better understand the movement of trucks throughout the region.
  - Build a truck travel demand model suitable for forecasting and integrate into the region’s overall travel demand model.

- **Recognize the Corridors of Freight Significance and conduct regional assessments**
  - The MARC Goods Movement Committee should create a work plan that will recognize the national, regional, and local corridors and set an action plan to complete assessments of prioritized corridors.
Identify corridors that serve ports and airports such as those with landside access to support water and air.

Using the assessments, “last-mile” projects will be identified and can be championed by the appropriate agency for implementation.

- Focus on attraction and retention of transportation and logistics businesses
  - Position the region as a location for emerging sectors such as “green” industries including components and finished products for green energy technologies that include wind and solar power, as well as, advance transportation and battery technology.
  - Maintain efforts to attract established industries like component assembly in the automotive, aircraft, and agricultural machinery manufacturing sectors.
  - Continue the attraction of warehouse and distribution centers.
  - Leverage construction at proposed and recently opened regional intermodal facilities
  - Continue to invest in Kansas City SmartPort.

- Innovate marketing efforts by emphasizing the competitive advantage of the region
  - Invigorate communication between the freight community and the public sector.
  - Establish a base of continuous data to report and provide a forum where the report can be discussed and challenged.