

Scoping Assistance - PDEA

Description

The purpose of this procedure is to describe how the Transportation Planning Branch (TPB) handles notices of internal and external scoping meetings from the Project Development and Environmental Analysis (PDEA) Branch, and the responsibilities of TPB staff.

Responsibility

The *PDEA Project Development Engineer* (PDEA Engineer) is responsible for:

- Coordinating with the appropriate TPB Regional Planning Group Supervisor to obtain the primary project contact for TPB.
- Scheduling and conducting the Internal Scoping Meeting
- Providing and distributing information for review prior to the Internal Scoping Meeting.
- Scheduling and conducting the External Scoping Meeting.
- Distributing the [scoping information sheets](#) for review prior to the scoping meetings.
- Documenting the Scoping Meetings with meeting minutes, and distribution of the minutes.

The *TPB Engineer* is responsible for :

- Collecting and providing the requested information for the scoping meetings and attending the meetings.
- Presenting the CTP Traffic Data and other CTP/MTP Data at the scoping meeting and including the MPO/RPO representative as appropriate in any preliminary meetings.

Scheduling and Time Constraints

The scheduling of the Internal Scoping Meeting should be such that there is time for the TPB Engineer to provide CTP Traffic Data for discussion at the Internal Scoping Meeting. This should be information that is readily available from the CTP or MTP. The appropriate STaRS networks should be checked to determine the minimum time needed to allow for this activity.

Procedure

A. Internal Scoping Meeting

- 1. PDEA Engineer contacts the TPB Regional Planning Group Supervisor** to obtain the name of the TPB Engineer who will serve as the contact for the remainder of the project.

A preliminary meeting between the PDEA Engineer and the TPB Engineer assigned to the project is recommended to discuss the information available from the CTP/MTP and TPB's role in the scoping process.

Note: The TPB Engineer will be responsible for including the MPO/RPO representative as appropriate in any preliminary meetings; however, it remains the TPB Engineer's responsibility to provide information for the Internal and External Scoping meetings.

2. PDEA Engineer schedules the Internal Scoping Meeting.

Information is sent to the designated TPB Engineer and the meeting should be placed on the designated representative's calendars. The TPB Engineer will represent TPB during the scoping process. Once a Traffic Forecast is requested and delivered, the Traffic Forecast Engineer may attend the Scoping Meetings to explain the forecast, however, the TPB Engineer will remain the primary point of contact.

3. Prior to the Internal Scoping Meeting, the TPB Engineer reviews and collects the appropriate information that will be discussed during the Internal Scoping Meeting:

- Comprehensive Transportation Plan (CTP). TPB provides a copy of the CTP report and a copy of the CTP maps. Specific information to be discussed will include:
 - Status of Study – complete, currently in update, outdated, etc.
 - Metropolitan Transportation Plan (MTP) update schedule (for Metropolitan Planning Organizations (MPOs)), including lapse date
 - Whether or not the facility is identified as a Strategic Highway Corridor
 - Any existing Problem Statement – discussion and determination of problem statement and need for project.
 - Local development patterns (information used to develop CTP)
 - Local issues that arose during development of CTP/MTP – concerns or support for project implementation
 - Environmental issues considered during development of CTP/MTP
- Unique characteristics of the local area/project vicinity
- Tool(s) used to project traffic in the development of the CTP/MTP – travel demand model (TDM), hand allocation, trend line analysis, etc. and assumptions that were included in the development of the plan
- CTP Traffic Data that is readily available – information in the study report (daily volumes or other information that may be useful prior to the project traffic forecast). It should be noted that the assumptions for the CTP Traffic Data is different than that which will be used in the Project Level Traffic Forecast. (see TPB Project Scoping Guidance)
- Previous traffic forecasts that have been completed for the project – discussion and determination of traffic forecast needs
- Air quality status (non-attainment, maintenance, or attainment for Ozone, PM2.5 or CO). Specific information to be discussed includes (use [Air Quality Checklist](#)):
 - Horizon year(s) – when project is expected to be complete
 - Recommended cross section in conformity determination
 - Conformity schedule and lapse date
- Other information:
 - TPB provides information about who's who in the community and key groups that should be involved
 - PDEA provides insight into the priority of the project to the department or other special needs that they foresee during project development. If it is a high profile project notify TPB up front.

4. TPB Engineer attends the Internal Scoping Meeting

In addition to providing the data from step 3 prior to the Internal Scoping Meeting, the TPB Engineer will attend the Internal Scoping Meeting and be prepared to discuss the CTP Traffic Data and any other information related to the project. If there is an existing Traffic Forecast for the project, prior to the Internal Scoping Meeting, the TPB Engineer reviews and collects the appropriate traffic forecast information that will be discussed during the meeting. The TPB Engineer should review the data with the TPB Traffic Forecast Engineer prior to the meeting. If needed, the TPB Traffic Forecast Engineer will attend the Scoping Meeting to explain the Traffic Forecast:

Note: The TPB Engineer is the lead person to provide information for the scoping process and should attend all scoping/project meetings through Concurrence Point 3 and beyond if the need arises. The decision to attend a particular merger meeting should be based on the data that is needed by TPB.

5. Upload Data to Project Store and TPB Shared Drive

CTP Traffic Data and other Information provided during Scoping should be combined in one .pdf file and placed in the "Misc." folder under LongRangePlanning in Project Store by the TPB Regional Group Supervisor. An electronic copy should be uploaded to the shared drive (S:\Shared\TPB Reference\CTP Traffic Data) by the TPB Engineer. The file should include the TIP Project Number followed by the date and the CTP Study Name (e.g. R-2300_2013 July04_LocustCTPStudy)

6. The PDEA Engineer conducts the Internal Scoping Meeting, documents and distributes meeting minutes.

B. External Scoping Meeting

1. The PDEA Engineer distributes the scoping information for review prior to scheduling the External Scoping meeting. The TPB Engineer reviews the scoping information sheets and provides any necessary feedback.

2. The PDEA Engineer schedules the scoping meeting and sends the scoping memo with scoping information sheets to NCDOT units and resource agencies consistent with PDEA procedures.

This information should be provided to the TPB Engineer who will attend the External Scoping Meeting. (The TPB Regional Planning Group Supervisor and the State Traffic Forecasting Engineer (STFE) should NOT be included in the Scoping notices unless they either attended the Internal Scoping meeting, or special circumstances require their attendance.)

3. Upload Data to Project Store and TPB Shared Drive

Information provided by the TPB Engineer during External Scoping should be combined in one .pdf file and placed in the "Misc." folder under LongRangePlanning in Project Store by the TPB Regional Group Supervisor. An electronic copy should be uploaded to the shared drive (S:\Shared\TPB Reference\CTP Traffic Data) by the TPB Engineer. The file should include the TIP Project Number followed by the date and the CTP Study Name (e.g. R-2300_2013 July04_LocustCTPStudy).

4. The PDEA Engineer conducts the Internal Scoping Meeting, documents and distributes meeting minutes.

Policy, Regulatory, and Legal Requirements

None

Resources

- [PDEA Scoping Procedures](#)
- [Scoping information sheets](#)
- [Air Quality Checklist](#)
- [TPB Project Scoping Guidance](#)
- PDEA Scoping Guidance (currently in draft form)

Background

Scoping is conducted to discuss issues to be addressed and for identifying significant issues related to a proposed project.

The PDEA Engineer will contact the appropriate TPB Regional Planning Group Supervisor to find out who will be TPB's contact for scoping. Internal scoping consists of a range of communications, coordination and collaborative actions conducted to orient transportation personnel to a transportation project and serve as the framework for strategically planning the efficient and effective development of the project. Transportation personnel typically include representation from NCDOT, FHWA, MPOs/RPOs, and transportation planning personnel from cities or local communities. The PDEA and TPB Engineers will act as joint leads for the Internal Scoping Meeting, since one of the main goals of the meeting involves educating participants on what is already known about the problem and the area in which the problem exists. The External Scoping Meeting mimics that of the Internal Scoping Meeting except that the makeup of the attendees includes the appropriate resource agency representatives and key transportation staff determined at the Internal Scoping Meeting.

Record of Revision

The information contained in this procedure is deemed accurate and complete when posted. Content may change at any time without notice. We cannot guarantee the accuracy or completeness of printed copies. Please refer to the online procedure for the most current version. Contact TPB Staff Engineer with all the questions about this procedure.

Version	Section Affected	Description	Effective Date
2	All	Updated to reflect project streamlining including internal and external scoping and CTP Traffic Data	9/13/2013

Flowchart

None