



300 S. ADAMS STREET TALLAHASSEE, FL 32301
www.crtpa.org

CRTPA EXECUTIVE COMMITTEE

MEETING OF WEDNESDAY, AUGUST 23, 2017 AT 3:30 PM

TALLAHASSEE CITY HALL
FLORIDA ROOM, 2ND FLOOR
300 S. ADAMS STREET
TALLAHASSEE, FL 32301

MISSION STATEMENT

"The mission of the CRTPA is to act as the principal forum for collective transportation policy discussions that results in the development of a long range transportation plan which creates an integrated regional multimodal transportation network that supports sustainable development patterns and promotes economic growth."

AGENDA

1. **CALL TO ORDER AND ROLL CALL**

2. **AGENDA MODIFICATIONS**

3. **CONSENT AGENDA**
 - A. **Minutes of the June 7, 2017 CRTPA Executive Committee Meeting**

If you have a disability requiring accommodations, please contact the Capital Region Transportation Planning Agency at (850) 891-8630. The telephone number of the Florida Relay TDD Service is # 711.

4. CRTPA EXECUTIVE COMMITTEE ACTION

The public is welcome to comment on any discussion item after a motion has been made and seconded. Each member of the public is provided three (3) minutes to address the Executive Committee.

A. 2018 CRTPA Budget

The Fiscal Year 2018 Operating Budget has been developed for consideration.

B. Executive Director Evaluation

A discussion the recent annual evaluation of the executive director will be provided.

5. CRTPA EXECUTIVE COMMITTEE INFORMATION

A. CRTPA Website Redesign

An update to the discussion that occurred at the June Executive Committee regarding the agency's website will be provided.

6. CRTPA CITIZEN COMMENT

This portion of the agenda is provided to allow for citizen input on any CRTPA issue. Those interested in addressing the CRTPA Executive Committee should complete a speaker request form located at the rear of the meeting room. Speakers are requested to limit their comments to three (3) minutes.

7. EXECUTIVE DIRECTOR'S REPORT

8. ITEMS FROM CRTPA EXECUTIVE COMMITTEE MEMBERS

This portion of the agenda is provided to allow members an opportunity to discuss and request action on items and issues relevant to the CRTPA, as appropriate.



August 23, 2017

AGENDA ITEM 3 A

MINUTES

TYPE OF ITEM: Consent

The minutes and voting sheet from the June 7, 2017 CRTPA Executive Committee Meeting are provided as ***Attachment 1***.

RECOMMENDED ACTION

Option 1: Approve the minutes of the June 7, 2017 CRTPA Executive Committee Meeting.

ATTACHMENT

Attachment 1: Minutes June 7, 2017 CRTPA Executive Committee Meeting.



300 S. ADAMS STREET TALLAHASSEE, FL 32301
www.crtpa.org

CRTPA EXECUTIVE COMMITTEE

MEETING OF WEDNESDAY, JUNE 7, 2017 AT 4 PM

TALLAHASSEE CITY HALL
FLORIDA ROOM, 2ND FLOOR
300 S. ADAMS STREET
TALLAHASSEE, FL 32301

MEETING MINUTES

MEMBERS:

Commissioner Curtis Richardson, City of Tallahassee, Chair
Commissioner Nick Maddox, Leon County, Vice-Chair
Commissioner Betsey Barfield, Jefferson County, Past Chair

STAFF:

Greg Slay, Executive Director; Jack Kostrzewa, CRTPA; Greg Burke, CRTPA; Yulonda Mitchell, CRTPA

1. Call To Order and Roll Call

The meeting was called to order at 4:16PM.

2. Agenda Modifications

The agenda was modified to hear Citizen Comments at the beginning of the agenda.

Citizen Comment

Mrs. Nancy Miller, 443 Shannon Lakes Drive, addressed the need for Amtrak passenger rail service within the Tallahassee area/CRTPA Region. She discussed the need to begin to consider alternatives to congestion and encouraged ongoing discussions, the end result would not be reality until 15-20 years from today and requested that passenger rail be included in the next Long Range Transportation Plan (LRTP) Update.

Mr. Slay stated passenger rail was currently not included in the Regional Mobility Plan. He also noted that usually passenger rail services are provided by a private company. The Board would have to decide if roadway funds should be used on rail and noted that transit is mostly funded via the federal government. Mr. Burke stated the board adopted a regional transit study in 2010 plan (which covered about a 40 year period), and noted the key would be having a funding source. Commissioner Maddox stated back then there was a discussion about developing a regional committee, but could not locate members from the outlying areas to be a part of the committee. Commissioner

Barfield discussed the difficulty in working with CSX rail. She discussed the need to have the service include the Lloyd area.

3. CRTPA Executive Committee Action

A. Revised FY 2016/17 – 2017/18 Unified Planning Work Program (UPWP)

An overview of changes proposed for the FY 2017/18 UPWP will be discussed.

Mr. Slay discussed the changes that have been proposed for the FY2017/18 UPWP including corridor studies and a redesign of the CRTPA's website. Mr. Slay noted the proposal also included corridor assessments for previous studies on Bannerman Road, Pensacola Street and Orange Avenue.

Commissioner Maddox discussed cost of the website redesign (\$35,000). He stated this cost may be excessive and requested that proposals be discussed prior to moving forward. The Committee discussed the advantages to requesting all funds be in the Work Program.

Board Action: Commisisoner Maddox made a motion to recommend approval with the website proposals being re-considered at a later meeting. Commissioner Barfield seconded the motion. The motion was unanimously passed.

B. Executive Director Evaluation

A discussion of proposed processes for use in the annual evaluation of the executive director will be provided.

Mr. Slay provided an example of the documents that are currently used by the MPOAC for the Executive Director. Commissioner Maddox stated that, as the CRTPA's representative on the MPOAC, he was very familiar with the documents and felt the forms were sufficient to use for the CRTPA Executive Director's evaluation. The members were in consensus with the following timeline: Friday, 6/9/17-Mr. Slay sends document to members; Friday, 6/30/17-members return completed evaluation document.

4. CRTPA Citizen Comment

Agenda Modified and Citizen Comment was heard at the beigning of the agenda.

5. Executive Director's Report

6. Items From CRTPA Executive Committee Members

This portion of the agenda is provided to allow members an opportunity to discuss and request action on items and issues relevant to the CRTPA, as appropriate.

Meeting was adjourned at 5:05pm

Attested:

Yulonda Mitchell, Recording Secretary

Curtis Richardson, Chair



August 23, 2017

AGENDA ITEM 4 A

FY 2018 BUDGET

TYPE OF ITEM: Action

STATEMENT OF ISSUE

Attached please find the tentative budget for FY 2018. To provide a more transparent and comprehensive budget, we have made several modifications to more clearly identify expenditures as well as included all anticipated expenditures in one document. We are still working with the City of Tallahassee Financial Services to fine-tune some of the line items and there may be some changes prior to the September 19 CRTPA but we do not anticipate these changes to be significant.

Overall the proposed budget is about 9% less than FY 2017. As with any budget, there are increases in some areas and decreases in others. The most significant increases are in pension costs and health benefits. We were able to reduce spending in several areas to offset some of these increases. The budget includes a 3% cost-of-living adjustment (COLA) consistent with the current proposed rate by the City of Tallahassee, our host agency. This will offset projected increases in employee contributions to both health care benefits and pension. Any changes to the proposed COLA will be reflected in the final budget presented next month.

RECOMMENDED ACTION

Option 1: Approve as presented

Option 2: As directed by the Executive Committee

ATTACHMENTS

Attachment 1: Tentative FY 2018 CRTPA Budget

FY 2018 Tentative CRTPA Budget

	FY 17 - Adopted	FY 18 - Proposed	Net Change	% Change
Personnel				
511000 - Salaries	\$ 453,742	\$ 440,222	\$ (13,520)	-3.0%
511300 - Salary Enhancements	\$ -	\$ 13,207	\$ 13,207	-
511500 - Temporary Wages	\$ 23,000	\$ 24,102	\$ 1,102	4.8%
512400 - Other Salary Items	\$ 3,000	\$ 4,560	\$ 1,560	52.0%
515000 - Pension- Current	\$ 36,622	\$ 81,857	\$ 45,235	123.5%
515100 - Pension- MAP	\$ 17,637	\$ 22,690	\$ 5,053	28.6%
515500 - Social Security	\$ 5,940	\$ 2,901	\$ (3,039)	-51.2%
515600 - Mandatory Medicare	\$ 6,143	\$ 6,034	\$ (109)	-1.8%
516000 - Health Benefits	\$ 41,485	\$ 55,263	\$ 13,778	33.2%
516001 - Health Benefits-Retirees	\$ 10,328	\$ -	\$ (10,328)	-100.0%
516100 - Flex Benefits	\$ 17,268	\$ 10,646	\$ (6,622)	-38.3%
Operating				
521010 - Advertising	\$ 4,500	\$ 4,500	\$ -	0.0%
521030 - Reproduction	\$ 12,000	\$ 3,000	\$ (9,000)	-75.0%
521100 - Equipment Repairs	\$ 225	\$ 225	\$ -	0.0%
521180 - Unclassified Contractual Srvcs	\$ 82,500	\$ 6,500	\$ (76,000)	-92.1%
521160 - Legal Services	\$ -	\$ 24,000	\$ -	-
521190 - Computer Software	\$ 20,000	\$ 3,500	\$ (16,500)	-82.5%
522080 - Telephone	\$ 1,000	\$ 1,000	\$ -	0.0%
523020 - Food	\$ 1,200	\$ 1,500	\$ 300	25.0%
523050 - Postage	\$ 750	\$ 750	\$ -	0.0%
523060 - Office Supplies	\$ 4,500	\$ 4,000	\$ (500)	-11.1%
523080 - Unclassified Supplies	\$ 4,500	\$ 2,000	\$ (2,500)	-55.6%
524010 - Travel & Training	\$ 15,000	\$ 15,855	\$ 855	5.7%
524020 - Journals & Books	\$ 600	\$ 600	\$ -	0.0%
524030 - Memberships	\$ 2,500	\$ 2,500	\$ -	0.0%
524050 - Rent Expense- Building & Offic	\$ 12,626	\$ -	\$ (12,626)	-100.0%
541040- Insurance (for Workers Comp)	\$ -	\$ 16,500	\$ 16,500	-
550040 - Computer Equipment	\$ -	\$ 10,000	\$ 10,000	-
Internal Service Allocations				
560010 - Human Resource Expense	\$ 8,978	\$ 10,026	\$ 1,048	11.7%
560020 - Accounting Expense	\$ 18,141	\$ 19,508	\$ 1,367	7.5%
560030 - Purchasing Expense	\$ 6,848	\$ 3,195	\$ (3,653)	-53.3%
560040 - Information Systems Expense	\$ 25,529	\$ 27,020	\$ 1,491	5.8%
560070 - Revenue Collection	\$ 1,427	\$ 19	\$ (1,408)	-98.7%
560082 - Environmental	\$ -	\$ 1,028	\$ 1,028	-
Expenses (non-contractual)				
Personnel	\$ 615,165	\$ 661,482	\$ 62,206	7.5%
Operating	\$ 161,901	\$ 96,430	\$ (65,471)	-40.4%
Internal Service Allocations	\$ 60,923	\$ 60,796	\$ (127)	-0.2%
Subtotal	\$ 903,400	\$ 818,708	\$ (84,692)	-9.4%
521000 - Contractual Services (see attachment)	\$ -	\$ 2,000,066	\$ -	-
Total		\$ 2,818,774		

Contractual Services		
SW Area	\$	350,000
Midtown	\$	150,000
WEI	\$	62,500
Interactive TIP	\$	9,600
Webpage	\$	35,000
Cooridor reviews	\$	90,000
Audit	\$	30,000
TLCGIS	\$	10,000
RMP	\$	30,000
CMP	\$	185,000
ITS	\$	50,000
Unassigned	\$	997,966
	\$	<u>2,000,066</u>



August 23, 2017

AGENDA ITEM 4 B

EXECUTIVE DIRECTOR EVALUATION

TYPE OF ITEM: Discussion

STATEMENT OF ISSUE

We have received and compiled the results of the Executive Director's evaluations.

RECOMMENDED ACTION

As desired by the Executive Committee

ATTACHMENTS

Attachment 1: Individual Commissioner Evaluations
Compiled Evaluation Results



Executive Director Performance Review

EMPLOYEE INFORMATION

Name: Greg Slay

Review Date:

REVIEW INFORMATION

Reviewer Name: *Curtis Richardson* **Review Period:** July 18, 2016 - July 18, 2017

Complete this review using the following scale:

- 2 = EXCEEDS JOB EXPECTATIONS: Consistently exemplary performance, including in demanding situations or circumstances.
- 1 = MEETS JOB EXPECTATIONS: Competent performance in most situations and circumstances.
- 0 = PARTIALLY MEETS JOB EXPECTATIONS -- Shows capability, but in a variable manner. Improvement needed in key areas.
- X = DOES NOT MEET JOB EXPECTATIONS -- Major or ongoing problems that negatively impact organizational objectives.

	(Outstanding)	(Good)	(Needs Work)	(Poor)
	EVALUATION	2	1	0
Maintains effective communications with and availability for the CRTPA Board	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Represents the CRTPA well, understands role, and implements the Board's vision	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understands and maintains compliance with Federal and State MPO requirements as they apply to the CRTPA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understands current trends and issues impacting the CRTPA and membership, informs the Governing Board as to their implications	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hires and develops qualified staff appropriate for day-to-day operations and guides staff to achieve objectives	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintains public image of the CRTPA representing service, vitality and professionalism while enhancing the visibility and identity of the organization	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Builds relationships and encourages the creation of partnerships with other organizations that contribute to the CRTPA's mission and vision	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Develops sound budgets for current and future revenues and expenses necessary to maintain daily and overall operations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meets challenges head on	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manages assets including technology, equipment, budget, and office space	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Encourages public involvement and maintains transparency for the Board, the public, and staff

Inspires confidence, establishes credibility with the CRTPA Board

Maintains a "big picture" outlook and is aware of industry issues

Exhibits diligence in leading the CRTPA

Forecasts trends, responds to change, and invites innovation

Solicits and acts upon the ideas of others when appropriate

Demonstrates excellence in carrying out job responsibilities and accomplishing goals

Participates in relevant and worthwhile professional organizations

Areas for improvement:

Additional Comments:



Executive Director Performance Review

EMPLOYEE INFORMATION

Name: Greg Slay

Review Date: July 25, 2017

REVIEW INFORMATION

Reviewer Name:

Review Period:

July 18, 2016 – July 18, 2017

Complete this review using the following scale:

- 2 = EXCEEDS JOB EXPECTATIONS:** Consistently exemplary performance, including in demanding situations or circumstances.
- 1 = MEETS JOB EXPECTATIONS:** Competent performance in most situations and circumstances.
- 0 = PARTIALLY MEETS JOB EXPECTATIONS --** Shows capability, but in a variable manner. Improvement needed in key areas.
- X = DOES NOT MEET JOB EXPECTATIONS --** Major or ongoing problems that negatively impact organizational objectives.

(Outstanding) (Good) (Needs Work) (Poor)

EVALUATION

2 **1** **0** **X**

Maintains effective communications with and availability for the CRTPA Board	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Represents the CRTPA well, understands role, and implements the Board's vision	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Meets challenges head on	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manages assets including technology, equipment, budget, and office space	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CRTPA Executive Director Performance Review

EMPLOYEE INFORMATION

Name: Greg Slay

Review Date: 6/29/17

REVIEW INFORMATION

Reviewer Name: Betsy Barfield

Review Period: Annual

Complete this review using the following scale:

- 2 = EXCEEDS JOB EXPECTATIONS: Consistently exemplary performance, including in demanding situations or circumstances.
- 1 = MEETS JOB EXPECTATIONS: Competent performance in most situations and circumstances.
- 0 = PARTIALLY MEETS JOB EXPECTATIONS -- Shows capability, but in a variable manner. Improvement needed in key areas.
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	(Outstanding)	(Good)	(Needs Work)	(Poor)
	2	1	0	X
Maintains effective communications with and availability for the CRTPA Board	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Represents the CRTPA well, understands role, and implements the Board's vision	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Hires and develops qualified staff appropriate for day-to-day operations and guides staff to achieve objectives	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintains public image of the CRTPA representing service, vitality and professionalism while enhancing the visibility and identity of the organization	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Manages assets including technology, equipment, budget, and office space	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Encourages public involvement and maintains transparency for the Board, the public, and staff	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Inspires confidence, establishes credibility with the CRTPA Board	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintains a "big picture" outlook and is aware of industry issues	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exhibits diligence in leading the CRTPA	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forecasts trends, responds to change, and invites innovation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Solicits and acts upon the ideas of others when appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demonstrates excellence in carrying out job responsibilities and accomplishing goals	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participates in relevant and worthwhile professional organizations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional Comments:

Greg is a refreshing reset for the CRTPA. I believe we made the best choice in Greg as our new ED.

In my communications with FDOT I get the sense that Greg has formed good relationships from the very start. That work is key to moving our organization forward and advancing much-needed projects in our region.

Already he has made strides in personnel and a good review of staff and their duties and abilities.

Overall I am satisfied with Greg's performance and I look forward to him improving as he settles in to his role as our ED.

Encourages public involvement and maintains transparency for the Board, the public, and staff

Inspires confidence, establishes credibility with the CRTPA Board

Maintains a "big picture" outlook and is aware of industry issues

Exhibits diligence in leading the CRTPA

Forecasts trends, responds to change, and invites innovation

Solicits and acts upon the ideas of others when appropriate

Demonstrates excellence in carrying out job responsibilities and accomplishing goals

Participates in relevant and worthwhile professional organizations

Areas for improvement:

A little more lead time in the agenda distribution would always be helpful, however, I recognize it is not always realistic.

Additional Comments:

I am very pleased with the progress Greg has made improving our relations with the Florida Department of Transportation. I believe we are well-represented and the relationship building he is doing will assist us in the years to come.

	Chair Richardson	Vice-Chair N. Maddox	Past Chair Barfield
Maintains effective communications with and availability for the CRTPA Board	2	2	1
Represents the CRTPA well, understands role, and implements the Board's vision	2	2	2
Understands and maintains compliance with Federal and State MPO requirements as they apply to the CRTPA	2	2	1
Understands current trends and issues impacting the CRTPA and membership, informs the Governing Board as to their implications	2	2	1
Hires and develops qualified staff appropriate for day-to-day operations and guides staff to achieve objectives	2	1	1
Maintains public image of the CRTPA representing service, vitality and professionalism while enhancing the visibility and identity of the organization	1	2	1
Builds relationships and encourages the creation of partnerships with other organizations that contribute to the CRTPA's mission and vision	2	2	1
Develops sound budgets for current and future revenues and expenses necessary to maintain daily and overall operations	2	2	2
Meets challenges head on	2	2	1
Manages assets including technology, equipment, budget, and office space	2	1	1
Encourages public involvement and maintains transparency for the Board, the public, and staff	1	2	1
Inspires confidence, establishes credibility with the CRTPA Board	2	2	1
Maintains a "big picture" outlook and is aware of industry issues	2	2	1
Exhibits diligence in leading the CRTPA	2	2	1
Forecasts trends, responds to change, and invites innovation	2	2	1
Solicits and acts upon the ideas of others when appropriate	2	2	0
Demonstrates excellence in carrying out job responsibilities and accomplishing goals	2	2	1
Participates in relevant and worthwhile professional organizations	1	2	-

August 23, 2017



AGENDA ITEM 5 A

CRTPA WEBSITE REDESIGN

TYPE OF ITEM: Information

STATEMENT OF ISSUE

At the June 7 Executive Committee meeting, a discussion of the planned redesign of the agency's website occurred related to the Unified Planning Work Program (UPWP) agenda item. The discussion included potential costs and efforts associated with the redesign with staff noting that more information would be provided to the Committee prior to moving forward with the website update.

Subsequent to that meeting, staff has gathered more information related to the website's redesign and is proposing to move with a proposal received from a local firm (Capital Data Studio). The proposal is included as Attachment 1 and identifies the cost associated with the project (\$4,990).

ATTACHMENTS

Attachment 1: Website Redesign Proposal

TABLE OF CONTENTS

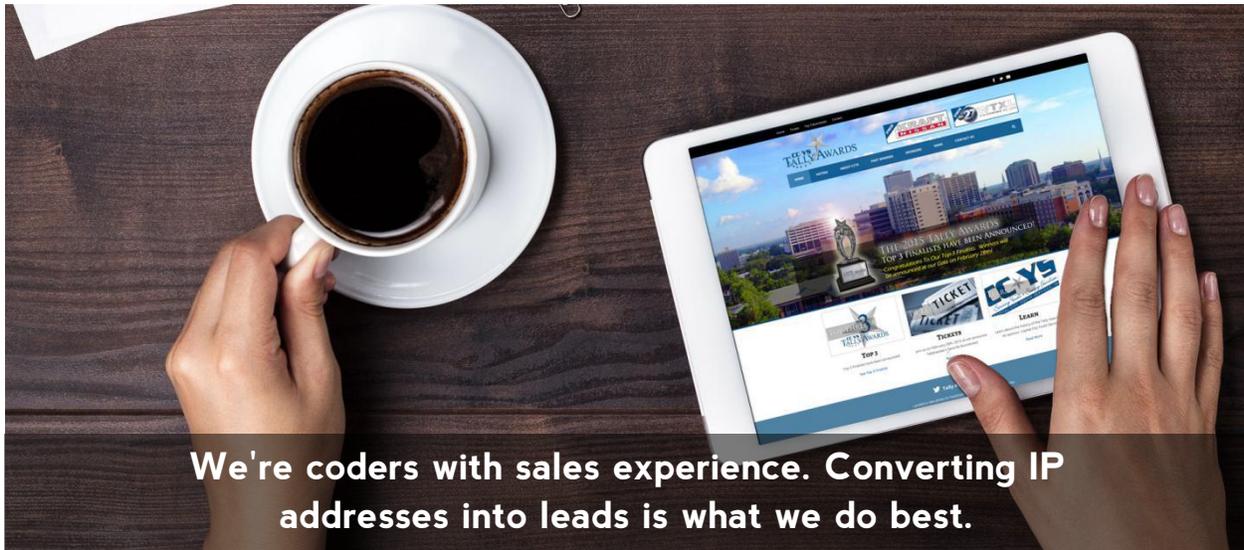
Section	Page
Our Profile	3
Our Team	4
Recent Work	5
Your Website (Features)	6
Time-lines	8
Project Detail and Pricing Proposal	10
Purchase Order	11

PROJECT MISSION

To build a professional online solution for the Capital Region Transportation Planning Agency while allowing for easy modification and updating in the future. We will build this site using WordPress as a content management system and design with modern standards in mind.

Our sites are built to be responsive. This means that your new website will look great on all mediums, from smartphones to large monitors. We also take security very seriously, so the new CRTPA website will adhere to best practices to make sure the WordPress installation is free from external threats.

In all, we will build you a search-engine-optimized, aesthetically pleasing, mobile-friendly website. We can showcase your work and expertise while converting visitors into prospects. *If you have any questions regarding this proposal, please call J.P. Lepez at (850) 443-4057.*



We're coders with sales experience. Converting IP addresses into leads is what we do best.

OUR PROFILE

Capital Data Studio is a Tallahassee based web design and data consulting company. Our specialty lies in creating great looking websites and software products that are easy to use and easy to manage.

WHAT WE DO

- WordPress and Website Development.
- Programming: PHP, SQL, JavaScript.
- Fully integrated e-commerce solutions.
- Custom Development.
- SEO and Online Marketing.

The decision to create a new website for your company or organization is usually an easy one. Whether you currently do not have a web presence or the one you currently have seems outdated the need for a new site is usually a priority.

However, choosing the right web-design company is a lot more difficult. Will the design be to my liking after my initial deposit? Will the technology they use to build the site meet modern standards? Will I have to start over after a hefty investment?

How Are Our Websites Different?

We try to make the decision a little easier. From the initial meeting to product delivery our process is designed for transparency and ease of use.

We specialize in WordPress development but analyze your needs before making a recommendation.

- ✓ We ask specific questions regarding site design and special functionality.
- ✓ You can see your site's design progress on a testing server.
- ✓ Complete set-up and training upon site completion.

CORE TEAM

J.P. Lepez

Founder, Lead Designer

J.P. Lepez is a graduate of Florida State University with degrees in Information Studies and Marketing. He started Capital Data Studio in 2010 after being in technical sales for a decade. While technically proficient regarding web technologies, his main focus is conversion: the concept that visitors should easily find what they're looking for and trust the company enough to allow themselves to be marketed to.

Technical Expertise:

- ✓ WordPress, HTML, CSS, PHP, SQL, JavaScript
- ✓ Photoshop
- ✓ Search Engine Optimization, Adwords, Analytics.

Jay Aviles

Lead Programmer

Technical Expertise:

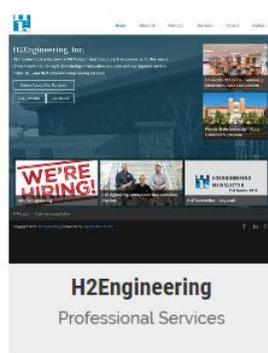
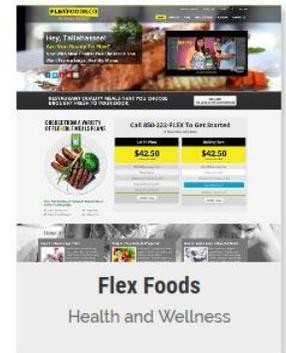
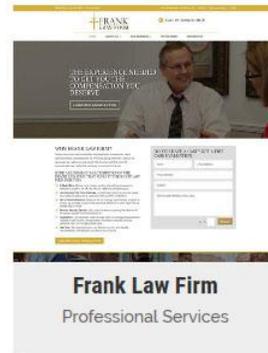
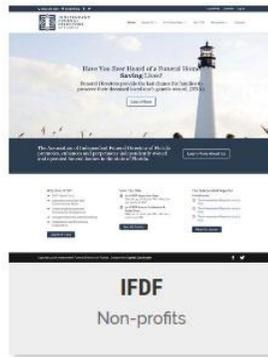
- ✓ Web sites and desktop application development.
- ✓ Opensource adaptations and customization, Joomla, Wordpress, OSCommece, Prestashop, Magento, Vtiger, PSD or PNG to XHTML + CSS + JAVASCRIPT

Kal Hynes

Copywriter and Content Manager

Kal Hynes is a former university professor and has won several prestigious awards, including a Clio for copywriting, and Bristol University's Dissertation of the Year. He was also nominated for the Frogmore Poetry Prize. Past and present clients number from a variety of businesses, including Scotiabank, Northrup, CLI, Oracle and others in e-commerce, finance, defense, law, medicine and many more.

RECENT WORK



We have many, many satisfied clients. Please visit our website for an expanded portfolio or request a complete list.

YOUR WEBSITE

DESIGN FEATURES

- **Responsive website that adapts to the size of the screen it's viewed on (i.e. tablets, smartphones)**
- Needs analysis interview to determine goal of site, monetization ideas and functionality requirements.
- Consultation on desired color scheme and brand integration.
- Implementation of professional usability standards to maximize ease-of-use.
- Include Royalty-free stock images and Royalty-free stock icons.



Responsive websites adapt to the size of the screen it is being viewed on.

MOBILE FIRST APPROACH TO DESIGN

With the proliferation of mobile devices into our every day lives we must come to terms with the fact that our websites are increasingly viewed on-the-go and on screens way smaller than those that sit on our desks. As such, we make design decisions based on the mobile experience and work our way upwards. This creates a fast, concise and coherent mobile user experience.

As well, Google has made it clear that mobile friendly websites will rank higher than non-responsive sites. This is a trend that will not only continue, but be expanded on by search engine providers.

In the meantime, a *Mobile First* approach means that the site is equally concise and not overcrowded at desktop size. Speed and readability concerns translate into the large screen experience as well.

CMS FEATURES

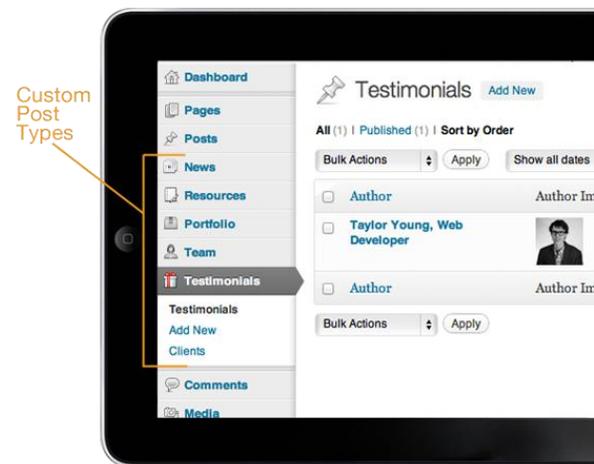
- Complete back-end area with ability for different members to have their own id and password.
- User restrictions based on access permissions (i.e. administrator can publish and delete articles but user can only submit articles and calendar items).
- Articles/News/Blog items can be easily inputted using a fancy text editor that allows for saving drafts. Once article is published it is automatically formatted as per site specs.
- Tagging allows for articles items to be filtered and displayed according to specs (i.e. Announcements, Important Events, News, etc.)

CUSTOM DATABASE ITEMS IN CMS

Database items (otherwise known as custom post types) allow for easy entry and administration of certain data types that are then displayed in a pre-determined manner on the website.

EXAMPLES OF CUSTOM POST TYPES:

- Board and Committees
- Meetings
- Calendar
- Links



FORMS EASILY CREATED AND DISPLAYED

Custom forms with custom fields created per customer specifications.

- Insert forms easily throughout the site such as at the bottom of each product.
- Create rule based logic based on fields within the form. For example, if the field regarding "Distributors" is selected then it would e-mail a specific person.
- Store all submissions within a database in addition to e-mailing them to staff.

FILE AND DOCUMENT MANAGER

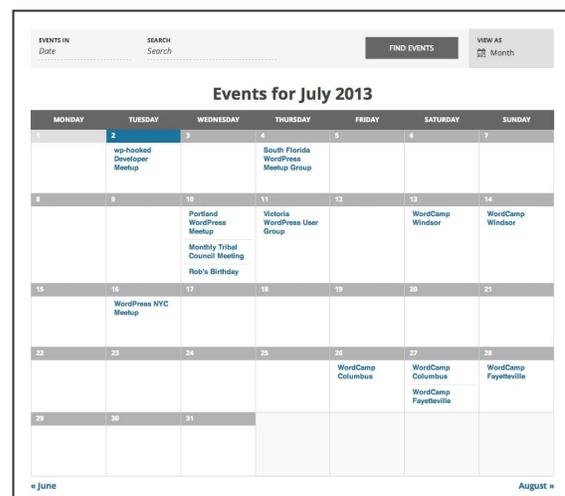
A powerful file manager including file categories, downloads counter, widgets, sorted file lists and more. Keeps your documents organized and sorted in the back-end system and allows the display of those files for easy download in designated places throughout the site. **Allows you to easily maintain the most current documents on your site without having to hunt down links within your pages.**



- Create dynamic paginated and sortable file/document lists
- Build document galleries
- Restrict downloads for certain user roles
- Built-in download counter
- Many file properties like author, version, supported languages, platforms and license
- Search integration
- Graphical interface on front-end.

CALENDAR

- Recurring events can be configured on a daily/weekly/monthly/yearly/custom basis, using an admin interface consistent with that seen on other popular calendar tools like Google Calendar or iCal.
- Saved venues & organizers
- Calendar month view with tooltips
- List view and Event search



PROJECT DESCRIPTION

STEP 1

Interviews to determine general aesthetics (colors, wide/narrow, sliders, etc.) Mock-ups are then created to begin design tweaking.

STEP 2

First site mock-up meeting to show progress and options. This is usually presented as screen-shots or on a testing server.

STEP 3

Upon draft approval, site is converted to HTML and CSS. Site is then uploaded to testing server for additional modifications.

STEP 4

We integrate the site into the CMS and create all custom post types that are automatically generated to match site design.

Your new site is designed to your specs and desired functionality is added to the Content Management System. Progress can be seen on a dedicated testing server.

PROJECT TIMELINE

Milestone/Week #	0	1	2	3	4	5
Preparation/Survey	█	█				
Design		█	█	█		
Content Management System			█	█	█	
Draft Review			█	█		█
Bug Fixes/Go-live on Website					█	█

Estimate time to complete: 3-5 weeks. Time line dependent on customer providing collateral materials. Text may be incomplete to avoid project delay.

PROJECT **DETAIL**

Working with us easy. Your satisfaction is our only goal.

DESCRIPTION

Custom Web Design and Revisions. Includes home-page and interior page mock-ups and up to 3 revisions for chosen design.

Content Management System Integration. We take your chosen design and code into HTML and then integrate it into WordPress (or other CMS if applicable).

Wire-frame site. Before we begin coding into the CMS, we layout all pages to strategize best flow for user interaction.

Set up of interior pages and revisions. We go through the hierarchy and carefully lay out each page and apply it to the menu system.

Custom Modules:

- Custom Post Types
- Forms
- File Manager
- Calendar

\$4,990

On Site Search Engine Optimization. Your new site is optimized with your specified keywords within the page. Best practices for SEO are carefully observed throughout.

Deployment and Training on CMS. Set up site on testing server and then deploy on live server. We train staff on best practices for CMS use.

Custom Forms. Based on fields provided by client custom forms are created. Integrated with transactional e-mail service.

TOTAL: \$4,990

PURCHASE ORDER

Ready to get started? Please fill out the following and fax to (850) 254-7141. Your assigned project manager will take care of the rest of the details.

Name:	_____	Email:	_____
Company:	_____	Phone:	_____
Address:	_____	Fax:	_____
	_____		_____

ACCEPTANCE OF QUOTE

50% deposit to begin project.	\$2,495.00
50% at project go-live.	\$2,495.00
Total	\$4,990.00

IMPORTANT TERMS:

- ¹ Project investment does not include an ongoing hosting/support agreement after project completion. Support agreements are on a separate proposal and are determined by client needs.
- Delivery method is determined by customer (i.e. CD-ROM files or uploaded to server).
- Customer will receive a copy of all work files upon completion of project and retains all copyrights.

Print Name _____ Position _____

Date _____ Sign in here to approve _____



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