

**BINATIONAL  
TRANSPORTATION PLANNING  
AND PROGRAMMING STUDY**

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**JOINT WORKING COMMITTEE  
TRANSITION PLAN**

*Barton-Aschman  
La Empresa*

*April 13, 1998*

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## **BINATIONAL BORDER TRANSPORTATION PLANNING AND PROGRAMMING STUDY TRANSITION PLAN**

This report describes the actions suggested for the Joint Working Committee (JWC) to transition from an organization performing primarily study oversight to an entity which conducts a continuing U.S.-Mexican border area transportation planning and programming mechanism. The report provides suggested protocols for the operation of the JWC as well as descriptions of actions needed to complete the transition. This includes changes in responsibilities of the JWC, transferring of information and activities from consultants to JWC member agencies, and startup of new activities. The transition plan is expected to enter implementation immediately after approval by the JWC.

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## **Preface**

U.S./Mexico Binational Border Transportation Planning and Programming Study implements a significant binational policy making document entitled "Memorandum of Understanding on the Planning Process for Land Transport on Each Side of the Border" signed by the federal governments of Mexico and the United States at the first "NAFTA Transportation Summit" held in Washington, D.C., April 29, 1994.

The purpose of this study is to provide policymakers with information needed to establish a continuous, joint, binational, transportation planning and programming process. A goal of this study is to improve the efficiency of the existing binational policy making planning procedures and funding criteria affecting our Border Land Transportation Systems (BLTS). The BLTS should be seen as a binational transportation system made of international bridges and border crossings and land connections to major urban and/or economic centers, principal seaports, airports and multimodal/transfer stations, and ultimately, to national transportation facilities.

This report describes the actions suggested for the Joint Working Committee to transition from an organization performing primarily study oversight to an entity that conducts through its border states continuing border area transportation planning and programming. The actions described in this report were defined by the JWC's Transition Committee. Its members are: Jose San Martin, Mexican co-chair; George Schoener, U.S. co-chair; Dale Buskirk; Carlos Lopez Rodriguez; and Rita Vargas.

## **Disclaimer**

The purposes of the Binational Planning and Programming Study and all of its reports were: to investigate current state and national transportation planning processes in both the United States and Mexico, to review available data on border transportation infrastructure and goods movement, and to recommend an ongoing, binational planning and programming process. The information contained in these reports was not developed to serve as the basis for making funding allocation or distribution decisions at either the federal or state level in the United States.

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*Prepared for  
The Joint Working Committee*

*Prepared by  
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# 1. Introduction

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This report describes the protocols and actions which will be employed by the Joint Working Committee (JWC) after the study. It is intended that the transition will be completed by mid 1998 and that the first products under the new JWC role will also be completed in 1998.

To simplify and facilitate use of this report, most information is provided in tabular or list form. This will enable JWC members to easily reference this document for information on JWC procedures. The JWC may wish to update the tables and lists from time to time to maintain them as living documentation of operating procedures.

## 1.1. Memorandum of Understanding

On April 29, 1994, a Memorandum of Understanding was agreed to between the United States and Mexico. This Memorandum of Understanding created a Joint Working Committee (JWC) charged with:

- analyzing,
- developing, and
- coordinating...

border transportation plans and programs...reflecting needs of both countries. This Memorandum of Understanding implies that the JWC would not make decisions or direct transportation, planning, programming, operations, or any other aspect currently performed by U.S. and Mexican federal, state, and local government agencies. However, the Memorandum of Understanding did contemplate enhanced communications, coordination, advice, and consensus among the entities on both sides of the border.

The role of the Joint Working Committee was discussed at length by the JWC during 1997. It was concluded that the JWC should:

- facilitate the *communication* among the groups responsible for border transportation planning within state, local, and federal governments in Mexico and the United States
- serve as a forum for the *coordination* of border transportation planning and programming activities while respecting the differing transportation planning processes and requirements that exist in both countries
- be available as a forum for discussing other binational border area transportation issues could also be discussed through the JWC.

## 1.2. Organizational Objectives

The organizational structure was designed to meet the following structural objectives:

- Maintenance of existing federal, state, and local roles in transportation planning and programming

- Emphasize communication as a means to coordinate plans, projects, and programs which have binational interest
- Facilitate sharing of information
- Provide specific supporting services needed to effectively carry out the communication, coordination, planning and programming activities
- Employ the smallest possible staff
- Have a flexible and effective organization
- Be truly binational in orientation
- Facilitate acceptance of communication and coordination activities by the federal, state, and local agencies

### **1.3. Organizational Structure**

Figure 1 shows the suggested organizational structure for the JWC. The concept for this structure was developed over several meetings by the JWC and agreed upon at the December 2-4, 1997 meeting in Tampico, Tamaulipas. The Phase IV report describes the structure in more detail.

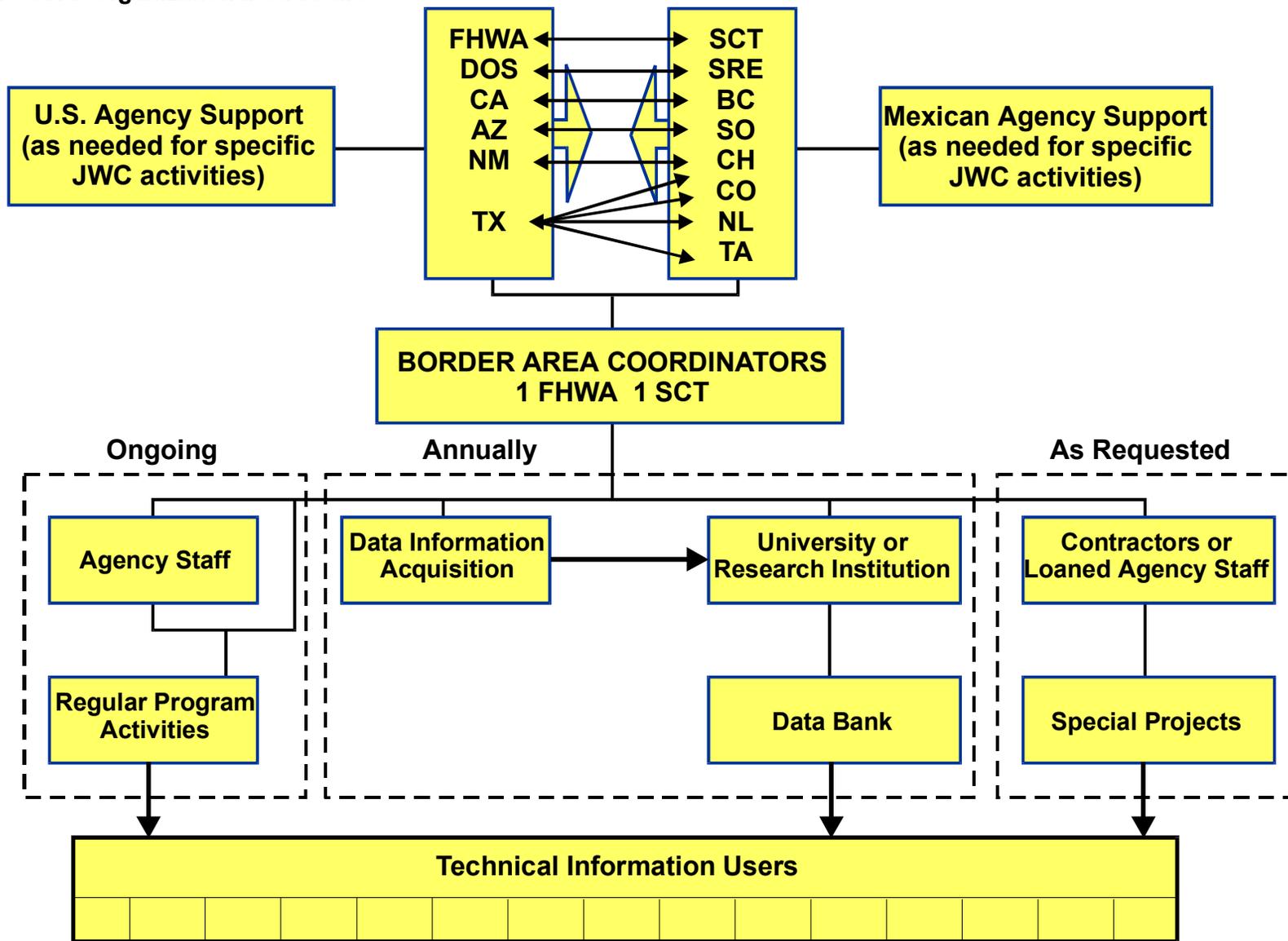
### **1.4. JWC Functions**

The JWC selected twelve basic functions upon which to base its program for the near term. These are:

1. strengthen the network of professional contacts and binational understanding
2. advise the Binational Bridges and Border Crossings Group on related themes building upon products of this study to increase the efficiency of transportation systems
3. strengthen communication and consensus building among the groups responsible for transportation planning in the federal, state, and local governments of the United States and Mexico
4. support the analysis and the joint formulation of projects between federal and state governments of both countries
5. technically review transportation programs/projects before and during the process of binational communications (Binational and federal to state)
6. help to minimize “disconnects” of the plans, programs, funding, and operations
7. distribute and update methodologies developed (in this study and after)
8. act as a forum for the coordination of border transportation activities, respecting the planning processes and requirements existing in both countries
9. supervise the maintenance and updating of the binational data bank with relevant information for border transportation planning and programming
10. conduct special studies to look into specific issues
11. research new financing schemes
12. prepare annual work plan

These activities are discussed in the Phase IV report.

Figure 1 JWC Organizational Structure



## **2. Transfer Activities**

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### **2.1. Protocols**

The following tables describe the protocols under which the JWC will operate. Table 1 covers regular JWC communications, both within and outside the JWC membership. Table 2 describes various aspects of setting up and conducting JWC meetings.

Protocol for the JWC approval process is contained in Table 3. The approvals are for annual work program, contracts, work authorizations, work orders, or other expenditures, progress reports and specific projects.

Approvals by the JWC will be by consensus of both the U.S. and Mexican member delegations.

Table 4 provides the protocols for funding of JWC and related activities.

### **2.2. First Year Activities**

The JWC's activities for the first year will be described in a first year work program to be developed separately by the Transition Committee. It will include specific activities and a general description. The coordinators, working with others as needed, will then draft more detailed work descriptions or terms of reference for each of the activities. These will be submitted to JWC for review prior to initiation of work. It is expected that the first year work program will be developed and reviewed in parallel with this transition plan.

### **2.3 Transfer of Consultant Materials**

Table 5 shows the plan for the transfer of materials from the consultant to the JWC. Virtually all materials will be transferred to the FHWA in the United States and to the Institute of Transport in Mexico.

It is suggested that the receiving entities review the materials in the offices of the consultants and select those items which they want transferred. These items would then be properly labeled, cataloged, and boxed for shipping to the receiving entities. This way the transferred materials will be limited to those which are felt to have continuing value. This will avoid unnecessary sorting by the recipients.

**Table 1  
Communications Protocols**

Type	Initiator	Frequency	Method	Notice/Lead Time <sup>1</sup>	Comments
<u>Communications with JWC members</u>					
Progress reports	coordinators	3 months	e-mail	regular schedule; inputs from JWC due two weeks before issue date	
Decisions	chairs	as needed	e-mail or fax	1 week	
			teleconference	2 weeks	
Product approvals	coordinators	as needed	mail, e-mail, or fax	small - 2 weeks	
				major - 4 weeks	
Contract approvals	coordinators	as needed	mail, e-mail, or fax	2 weeks	
Discussions, information sharing	<ul style="list-style-type: none"> <li>regular - separate U.S., Mexican delegations</li> </ul>	monthly	teleconference or videoconference	select regular day/time each month; 1 month notice for changes from regular time	JWC members may request additional discussions through coordinators. Coordinators should transmit agenda by e-mail t least 3 working days before teleconference or videocnference.
	<ul style="list-style-type: none"> <li>Binational - JWC chairs, coordinators<sup>2</sup></li> </ul>	as needed	teleconference or videoconference	2 weeks	JWC members may request additional discussions through coordinators. Coordinators should transmit agenda by e-mail t least 3 working days before teleconference or videoconference.
<u>With other agency members</u>					
<ul style="list-style-type: none"> <li>information dissemination</li> <li>input</li> </ul>	coordinators though JWC members	as part of progress reports (see above) or as needed	e-mail	2 weeks for any input from JWC	It is expected that JWC members will forward progress reports to interested persons within their jurisdictions; additional communications will be as needed and coordinated or confirmed through JWC members.
	JWC members within own jurisdiction	as needed	e-mail, fax, phone, or mail	minor - 2 weeks major - 4 weeks or as otherwise appropriate	

<sup>1</sup> From the established time of notice. Lead time may be less if JWC members contacted directly and availability and satisfactory preparation time confirmed.

<sup>2</sup> Discussions between members of U.S. and Mexican delegations will occur either at JWC meetings or, if needed between meetings, among the chairs and coordinators. Decisions will be made according to the protocol described in Table 3.

**Table 1  
Communications Protocols (Continued)**

Type	Initiator	Frequency	Method	Notice/Lead Time <sup>3</sup>	Comments
<u>With participants outside JWC agencies</u> <ul style="list-style-type: none"> <li>• information dissemination</li> <li>• input</li> </ul>	JWC members JWC members	as appropriate as needed	e-mail, fax, mail e-mail, fax, mail, telephone	N.A. minor - 2 weeks major - 4 weeks	additional time will be needed if input is to be consolidated or transformed by JWC member before input to coordinator or JWC.
<u>With public</u>	chairs	as needed	mail	4 weeks minimum	should be approved by JWC (by mail/fax/e-mail ballot if necessary see product approval above)

<sup>3</sup> From the established time of notice. Lead time may be less if JWC members contacted directly and availability and satisfactory preparation time confirmed.

**Table 2  
JWC Meetings**

Action/aspect	Responsibility	Lead Time	Comments
Meeting schedule (dates)	chairs	specific dates - 2 months minimum	chairs should coordinate with host JWC member
Meeting location	host country chair	select city 3 months ahead; site and dates 2 months ahead	alternate locations between United States and Mexico; within each country, rotate among the border states and federal capital city
Number of meetings per year	chairs	N.A.	2 minimum; not more than 3 unless specific activities require
Meeting agenda	host country chair with input from other chair	1 month before meeting	circulate drafts to JWC members for comment/suggestions at least two weeks before agenda finalized
Meeting attendees	JWC member agencies	1 month before meeting (to enable host to have attendance count)	each member is expected to attend every meeting; if needed, each member may be accompanied by senior staff members familiar with the subject matter being discussed; participation in meeting discussions will be limited to the JWC members.
Meeting length	chairs	1-2 days plus any delegation pre-meetings	delegation pre-meetings should be scheduled the afternoon or evening before the JWC meetings; additional meetings may also be needed before or after the main meeting
Responsibility for meeting arrangements, hotel arrangements, meeting rooms, meals, audio/visual equipment, translators, other local arrangements	host state JWC member	hotel/meeting facility - 2 months; other 1 month	confirm needs with coordinators requires simultaneous translators with transportation technical language capability
JWC member travel arrangements/reservations	participants handle own		cost often lower when made farther in advance
Meeting budgets	chairs with input from host JWC member	3 months	
Funding sources <ul style="list-style-type: none"> <li>meeting rooms, meals, equipment, local arrangements</li> <li>JWC member travel such as air fare, hotel, meals (those not included in meeting activities)</li> </ul>	host agency  individual participants' employers	2 months	JWC budget may include fixed amount per meeting or specific allocations to cover extra-ordinary costs associated with individual meeting agendas
Meeting chair	host country chair	N.A.	
Meeting format	establish as part of agenda; normally a combination of presentations and discussions	see agenda above	copies of presentation materials should be handed out in both English and Spanish to facilitate understanding
Language used	speakers talk in own country's language	N.A.	simultaneous interpretation to be provided so discussion can be in both languages

**Table 3**  
**Approval Protocols**

<b>Item</b>	<b>Approval Responsibility<sup>3</sup></b>	<b>Preparation Responsibility</b>	<b>Comments</b>
Annual work program	JWC	coordinators with reviews by chairs	JWC members will be asked to provide suggestions for work program components at least one month before completion of the draft program
Terms of reference for special projects	JWC	coordinators with reviews by chairs	
Contracts	authorization by JWC  contract terms by contracting entities	contracting entities, using terms of reference approved by JWC	contracts will generally be between a JWC agency and project provider; one agency will be designated by the chair of the contracting country as the contracting agency for each contract
Work authorizations, work orders	contracting agency with concurrence by JWC	contracting agency	most work orders should have been approved in advance by the JWC as part of the terms of reference approval for contracts
Specific expenditures	chairs	coordinators	
Contractor invoices	contracting entity	contractor	
Progress reports	chairs	coordinators	
Project products	JWC	as appropriate  • coordinators  • JWC agencies  • contractors	normally JWC will review a draft, make comments, then ballot the revised draft for approval. Minor products may be balloted on first review at option of chairs

<sup>3</sup>All JWC approvals by consensus of both U.S. and Mexican member delegations.

**Table 4**  
**Funding Protocols**

<b>Item</b>	<b>Responsibility</b>
Coordinator payroll, travel, support costs, ongoing activities by coordinators	USA - Federal Highway Administration (FHWA) Mexico - Secretariat of Communications and Transportation (SCT)
Chair payroll, expenses, support	USA - FHWA Mexico - SCT
JWC member payroll, expenses, support	JWC member's employing agency
Meetings	normal costs: host JWC agency 50% FHWA, 50% SCT for extraordinary expenses to be approved in advance by chairs and FHWA/SCT
Special projects	USA 50%, Mexico 50% federal or pooled funding depending on specific project and whether it will qualify for federal funding in each country
Other	USA 50%, Mexico 50% specific sources based on activity

**Table 5  
Transfer of Materials**

Item	Recipients		Comments
	United States	Mexico	
Data bank	FHWA	Institute of Transport	includes metadata base (index), electronic files (consisting of spreadsheets, data bases, GIS or other map files, electronic files of summaries from which study products were produced), hard copy reports, data, maps, Also available are interim products, drafts, etc.
Study reports	FHWA	SCT	available in both electronic and reproducible hard copy form
Study records	FHWA	SCT	JWC meeting summaries, progress reports, invoices, correspondence, notes, etc; hard copy and electronic form
Computers • in consultants' offices - website server • at state transportation department offices	FHWA  stay at state DOT offices - in office of JWC representative	SCT  Stay at state transportation agency - in office of JWC representative	
Materials in federal or state transportation department offices	As desired by JWC members in own state	As desired by JWC members in own state	

#### 2.4. Initiation of Data Bank Operation

The JWC data will be maintained in a distributed type data bank with a centrally maintained index. This means that each actual data file will be maintained by its originating source, but will be indexed by a central entity. Data will be able to be found by accessing the central index and then seeking out the data electronically or manually from the source. The index will be updated periodically by the FHWA or Mexican Institute of Transport based on information received from the originating sources. A few data items may be maintained by the central data bank, particularly those items which may be interim or final products of the study or subsequent JWC activities. The process and data bank structure are described in more detail in the Task 17 report.

Table 6 describes some of the details associated with initiating the continuing operation of the data bank during the transition period. More details are contained in the Task 17 report.

While the operation of the data bank will be by the FHWA and Institute of Transport, the states and federal agencies will need to make the following commitments:

- become familiar with the update procedures and assign qualified staff the responsibility for providing the updates
- commit to collecting updated data of binational interest (see Task 17 report for desired data)

**Table 6**  
**Data Bank Operation Initiation**

<b>Item</b>	<b>Responsibility</b>	<b>Comments</b>
Complete and transfer index	USA - Barton-Aschman Mexico - La Empresa	
Receive data bank items from consultants	USA - FHWA Mexico - Institute of Transport	
Receive introduction/familiarization/training of agency staffs for data bank	USA - FHWA Mexico - Institute of Transport	this should occur at time of transfer of servers and software
Set up "binational" home page on permanent website	USA - FHWA Mexico - Institute of Transport	will require transferring the binational web sites and associated software to FHWA and Institute of Transport and getting them operational.
Establish electronically accessible index on "binational" home page	USA - FHWA Mexico - Institute of Transport	
Establish procedures for accessing and obtaining data from sources	FHWA, Institute of Transport, JWC, States	will require agreement on what will be made available electronically, how requests will be made for both electronic and hard copy files, how data will be transferred, any limitations on use.
Establish update procedures, schedule, communications process (for both index, data)	FHWA and Institute of Transport cooperatively with review and concurrence by JWC, States	part of review/approval of Task 17 report; there must also be commitment from the JWC and their agencies to provide data in a timely manner

- provide updated data and index information in form requested and in timely manner
- make data conveniently accessible to participating JWC members (and others if that is agreed); provide data bank manager with any requirements for data distribution.
- work to make the binational data electronically accessible as soon as practical (timing to be discussed at future date by JWC)

**2.5. Establish Procedure For Requests For JWC Input And Assistance**

The JWC will need to establish procedures for handling requests for assistance, data, or other input to not only member agencies, but also other agencies involved with binational transportation. The following is suggested:

- States, local agencies, authorities and other entities discuss requests with JWC member in their state. If request is from outside member states, request could go to country's coordinator.
- If the request can be addressed by the member's state the JWC member would refer the request to the appropriate person within the state.
- If the request is binational in nature, the JWC member would refer the question to that country's coordinator.
- Any binational question would be discussed by the two countries' coordinators. The coordinators would refer the request to people who could best respond.

- Binational requests for assistance which require significant time or resources would be discussed with the chairs.
  - a) Minor efforts would be handled directly and communicated through the coordinators or their designees
  - b) Major efforts would have to be considered as part of the work program for the current or future year.
- All requests that pass through the coordinators should have responses also pass through the coordinator(s). This will ensure that they are being fully responded to and that they are handled appropriately.

This procedure or a similar one should be agreed to at the April 1998 JWC meeting since requests will likely start in mid-1998.

## **2.6. Transportation Technology Transfer Program**

The JWC has been carrying on a binational transportation technology transfer program for the past several years. This program has involved exchange of technical information, lending of equipment, and technical assistance. This program is proposed to be continued through the JWC. Assistance would be offered through the JWC to all (border transportation) agencies involved in transportation planning and programming and related subjects. This would not be a transfer of activities; it would be a continuation.

## 3. JWC Membership and Support

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### 3.1 Membership

The JWC will have the following membership:

- U.S. and Mexican border states: one member each
- Department of State (DOS) and Secretariat of Foreign Relations (SRE): one member each
- FHWA and SCT: 4 members each

This represents a continuation of the current numbers of representatives.

It is suggested that the JWC members be the directors of their agency's transportation planning and programming departments or the division responsible for border area transportation planning and programming. The members may be assisted and accompanied to JWC meetings by senior staff members who are familiar with the subject matter being addressed or discussed.

### 3.2. JWC Chairs

The JWC will be chaired by the senior representatives of the FHWA and SCT. This will be a co-chair arrangement. The two co-chairs will be expected to coordinate their activities and direction. They will have the overall responsibility for the success of the JWC activities.

The co-chairs would be responsible for completion of the transition activities, the hiring and supervision of the coordinators, and the successful completion of the JWC's work program of activities.

The chairs could at least initially be responsible for:

- Implement transition plan
- Overall success of JWC activities
- Recommend annual objectives for the JWC to consider
- Supervise coordinators
- Call meetings
- Prepare JWC meeting agendas
- Chair JWC meetings
- Direct annual work program implementation
- Approve JWC progress reports for distribution to the JWC
- Interface with federal agencies
- Authorize expenditures for meetings, ongoing recurring activities, coordinators' tasks
- Approve and sign official JWC correspondence
- Manage JWC budget
- Represent JWC at top level political events
- Mediate any issues between states and countries

- Lead resolution of binational “disconnects”
- Involve other agencies when needed

### **3.3. Coordinators**

One coordinator will be hired by the FHWA and one by SCT. The coordinator will be dedicated full time to JWC activities. The coordinators may be assisted by other FHWA or SCT staff as needed. For example, staff with specialized skills may be needed to assist on technical projects, the data bank, or other tasks.

The initial responsibilities of the coordinators could include:

- Assist chairs to implement transition plan
- Develop draft work programs and budgets with appropriate assistance
  - a) annual
  - b) special projects
- Receive requests for assistance and work with chairs and JWC members to provide appropriate responses
- Assist data bank manager to obtain data and data bank index updates
- Work with host JWC members on JWC meeting arrangement logistics
- Monitor annual work program progress
- As needed, facilitate communication among border transportation interests
- Perform annual work program tasks within own capability range
- Compile summaries in GIS form of border area transportation plans and programs, and identify potential disconnects and coordination needs
- Develop and maintain an outreach program meeting JWC approval
- Represent JWC at Binational Bridges and Border Crossings Group and similar border transportation meetings; prepare and deliver reports/presentations in response to BB&BCG requests and on relevant JWC activities and issues
- Periodic regional briefings to FHWA, SCT, and state management officials
- Prepare quarterly and annual progress reports

#### **3.3.1 Qualifications**

It is suggested that each of the coordinators meet the following qualifications:

- fluent, both oral and written, in both English and Spanish
- bi-cultural (U.S., Mexican)
- transportation planning and programming or policy related background
- must know the transportation field and be able to speak about relevant transportation issues and understand the jargon
- successful experience interacting with top level government staff on interagency issues
- understanding of diplomacy and the delicacy required for international relations
- assertive personality with good track record of getting things completed

## **4. Implementation**

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The co-chairs of the JWC will be responsible for implementation of the transition plan within their own respective countries.

### **4.1. Domestic**

For domestic matters, the chairs will communicate with their own country's JWC members on matters involving the states or their representatives. The country's members will make the necessary decisions and then implement them. The federal members will be responsible for implementation at the federal level. The state members will be responsible for implementation and coordination at the state and local levels.

Matters which may have a binational impact or be of interest to both countries should be addressed as described below.

### **4.2. Binational**

For matters involving or of interest to both countries, the two chairs will communicate. Major decisions involving both federal and state governments in both countries will be referred to the JWC for discussion. This may be done by teleconference, e-mail, fax, or meeting. Issues affecting only the federal governments may be resolved by those members if there are no impacts on the states of either country. Details on logistics will be handled by the chairs, with input from others as needed. Any formal binational agreements should be reviewed in advance with the Department of State and Secretariat of Foreign Relations members.

## 5. Budgets and Funding

### 5.1. Budgets

The co-chairs should establish a JWC budget to cover the transition and first year work program. The first year work program is being prepared separately from this transition plan. The JWC members will also need to prepare budgets for their own involvement based on the proposed transition plan and first year work program.

Table 7 provides a list of possible activities which may need to be funded. This table should be modified to include the transition and first year work program once it has been developed.

**Table 7**  
**Potential Budget Items - Transition and First Year**

Item	Involvement		Estimated Cost	
	Federal	State	USA (dollars)	Mexico (pesos)
<u>Transition</u>				
website, home page transfer and setup	□			
data bank transfer and setup on FHWA, SCT computers	□			
data bank communication and update procedures	□	input		
meetings	□	□		
coordinator recruiting, payroll, support	□			
chair payroll, support	□			
member payroll, support	□	□		
travel and other JWC expenses	□	□		
office equipment for coordinators	□			
other	TBD	TBD		
<u>First Year Work Program</u>				
coordinator salary, support, travel expenses	□			
chair salary, support, travel expenses	□			
JWC member salary, support, travel expenses		□		
data bank updates, data sharing	□	□		
meetings	□	□		
special projects	TBD	TBD		
information dissemination and coordination with other binational entities	□	□		
other	TBD	TBD		

TBD - to be determined.

## **5.2. Funding Sources**

The protocols contained in Chapter 2 of this report indicate the commitment for 50-50 U.S.-Mexican funding. Some will be provided federally, some at the state levels. Each state will need to fund the involvement of its own JWC member as well as data bank updating and data accessibility. Beyond that, the specific program for each year and eligibility for various types of funds will influence the sources of funds. These should be addressed at the same time as the work program is considered.

**Appendix**  
**JWC First Year Work Program**

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## JWC FIRST YEAR WORK PROGRAM

Revised April 7, 1998

The primary objectives of the first year program will be to:

- Build mutual understanding, trust, respect, and commitment to the JWC and its activities
- Add value to the border area transportation infrastructure planning and programming process
- Avoid “surprises” in border area transportation planning and programming
- Initiate data bank operation and updating procedures
- Share results of the Binational planning study
- Produce new products of value to the transportation community in the border area

The following are proposed activities to be included in the first year program. If agreed to by the JWC, funding will be sought for each activity per the protocols and funding criteria described in the transition plan.

### **A. Coordinator orientation (Coordinators) (assumes coordinators are hired prior to April JWC meeting; if not, schedule will be adjusted accordingly)**

#### 1. Transition team briefs coordinators

*Timing:* Immediately after coordinators have been hired

*Comments:* This will enable the U.S. and Mexican coordinators to be familiar with JWC history and current projects and activities so they can productively participate in meeting discussions. This would probably occur the day before the April JWC meeting.

#### 2. Coordinators become familiar with JWC constituents and border area and related issues, needs, plans, programs, proposals, coordination needs

*Timing:* Immediately after coordinators have been hired they will visit JWC member agencies; visits to be completed within approximately three months of initiation.

*Comments:* This will introduce the coordinators to the key people involved in the JWC agencies for border area transportation infrastructure (and related operations) planning and operation and familiarize them with the individual agency priorities, needs, concerns, policies, proposals, plans, programs, etc. It will provide the basis for an update on issues which the JWC is and should be addressing. This task will conclude with a presentation of findings at the fall/winter JWC meeting.

- a) meet with JWC members and appropriate staff of all member agencies in own country
- b) accompanied by other country's coordinator, meet with JWC members and appropriate staff in other country to discuss issues, needs, programs, plans, proposals of interest on both sides of the border
- c) meet with inspection and border station facilities agencies to become familiar with their staffs, needs, initiatives, etc.
- d) decide if more familiarization is needed and assess coordination, support, other needs

3. Coordinators prepare report of findings during Task 2 interviews and present to JWC

*Timing:* After Task 2 visits completed and in time for fall/winter JWC meeting

*Comments:* See comments for Task 2.

- a) findings
- b) needs
- c) issues which should be addressed
- d) proposed border transportation infrastructure projects for near future
- e) ongoing border transportation coordination efforts

#### **B. Data Bank (FHWA, SCT)**

4. Initiate data bank operation and updating

*Timing:* As soon as Task 17 report is approved and assigned FHWA and SCT staff are prepared to start.

*Comments:* This will be a two-part process in both countries: (1) agency representative visits consultant offices to decide which items are to be transferred to FHWA and SCT, respectively, and (2) consultant briefs designated agency staff in agency offices on how to use website, data bank, etc.

- a) receive data and websites
- b) establish data bank and website, providing accessibility to JWC agencies
- c) establish and transmit update procedures and schedule

#### **C. Share Results Of The Binational Study**

5. Conduct symposium of Binational transportation study findings from POE case studies and planned JWC planning and programming coordination activities

*Timing:* July 30-31, 1998 in Guadalajara, Mexico

*Comments:* Present 2 day symposium focusing on POE case study methodology and addressing the Binational transportation planning and programming process (past - future). Market to border transportation and business interests. Draft symposium outline has been developed by Transition Committee. SCT will prepare the draft symposium outline based on suggestions from the Transition Committee. It will be reviewed by the JWC and refined based on comments received.

6. Provide briefings to interested entities on Binational transportation study findings

*Timing:* Ongoing through year

*Comments:* Briefings will be offered to border transportation interests (public and private). Briefings will include JWC mission and objectives, highlights of 1996-8 study, first year program, results of JWC efforts to date (implemented results in process, operations, infrastructure). The coordinators will produce a standard presentation on which the briefings will be built. The briefings may be two-way: dissemination to audience and invitation for ideas, discussion of issues and needs.

**D. Prepare New Products (Special Projects)**

7. Conduct case study of McAllen-Reynosa area POEs

*Timing:* Mid 1998 (subject to funding availability)

*Comments:* Conduct case study of the four border crossings serving the McAllen-Reynosa area. Use methodology described in Task 13 report and produce report similar to the Task 9 report. Meet with local interests to discuss border crossing related issues before data is collected. Present tentative findings to interested local persons after field work is completed. Also prepare and present findings to JWC at a regular meeting.

8. Prepare second year work program

*Timing:* Prepare first draft in fall 1998; complete spring 1999 with feedback from agency budgeting processes.

*Comments:* Preparation by coordinators, review by chairs, submittal to agencies for review and ultimate approval. This is to be coordinated with agency budgeting schedules when funding is requested.

**E. JWC Communications (coordinators)**

9. Conduct two JWC meetings

*Timing:* Summer and year-end

*Comments:* The coordinators will work with local host agencies to arrange and conduct JWC meetings. Specific scheduling would be based on need and agenda. The summer meeting would be in Mexico and the year-end meeting in the United States. The summer meeting may be held in conjunction with the symposium. See Transition Plan protocol for specific responsibilities. Each meeting would include briefings on current/recent activities and coordination of infrastructure planning and programming. The proposed second year work program would be discussed at the winter meeting so any budget requests for FY 2000 could be reflected in agency budget requests..

10. Attend Binational Bridge and Border Crossings Group (BB&BCG) meetings

*Timing:* When scheduled

*Comments:* The coordinators would attend and report on JWC activities, making brief presentations at each meeting. They would also report back to the JWC per BB&BCG guidelines on information dissemination. ***(Note to Transition Team: the DOS and SRE representatives to the JWC may wish to make these reports to the JWC themselves)***

11. Ongoing coordination, communication, project oversight

*Timing:* continuous

*Comments:* Includes regular contact with JWC members to keep current on ongoing activities related to binational transportation planning, programming, and other JWC areas and projects of interest; assisting coordination of binational infrastructure plans and programs; quarterly progress reports; information dissemination; contract administration and management (that is not done by other JWC member agencies).