



Transportation Surtax Plan Agreement in Concept

Agenda Item #33, April 15, 2016

- 70% of any proceeds generated by a full penny Transportation Surtax used for County Transportation projects, 30% will be placed in a trust fund for municipal distribution subject to the terms of interlocal agreements with each participating city
- A board of appointees, acting in an advisory capacity to the Board of County Commissioners, will review project eligibility, audit performance, report, and prioritize
- As required by statute, all surtax revenues will be “deposited by the county in the trust fund”—a lock box
- Surtax proposed to sunset at thirty years (sufficient horizon for both bonding and federally-funded projects)
- From a certainty standpoint, the recommended approach is a population-based distribution
- Supports a process that prioritizes types of projects (new, renovation, as well as realistic operations and maintenance) and demonstrates appropriate planning, impact, and eligibility under the statute. Recognizing needs change and technology rapidly advances, an agreed-upon planning and prioritization process, subsequent to each census, will be utilized (both for municipal and county plans).
- A conceptual “plan” for how to utilize 70% of the proceeds was presented. The County Commission has asked for variations of the plan, narrative descriptions, and scenarios. It is fully expected that the draft plan elements will be modified based on input from partners; with fully-depicted projects at the 5-10-year range (for the purposes of communicating to the public/referendum).








Broward County Transportation Surtax 30-Year Vision Plan Options: FY 2017-2046

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	100% Plan (87.5% of total penny)		75% Plan		70% Plan		65% Plan	
OPERATING								
COSTS	Assumptions:	Costs:	Assumptions:	Costs:	Assumptions:	Costs:	Assumptions:	Costs:
Status Quo Plan	100% funded	\$6,547,865,257	100% funded	\$6,547,865,257	100% funded	\$6,547,865,257	100% funded	\$6,547,865,257
New Light Rail Transit (LRT)	7.5/10/15 min. frequency	\$1,928,736,240	7.5/10/15 min. frequency	\$1,928,736,240	7.5/10/15 min. frequency	\$1,667,661,459	7.5/10/15 min. frequency	\$1,356,596,823
Roadway and Surface Infrastructure		\$215,400,000		\$188,100,000		\$182,700,000		\$186,900,000
Road Capacity Expansion	140 lane miles		83 lane miles		68 lane miles		62 lane miles	
Intersection Improvements	60 intersections		60 intersection		60 intersections		60 intersections	
Bike Lanes/Complete Streets	110 miles		100 miles		98 miles		92 miles	
Sidewalks	492,000 linear ft.		460,000 linear ft.		430,000 linear ft.		390,000 linear ft.	
Greenways	70 miles		65 miles		65 miles		62 miles	
Traffic Signal Improvements	82 miles of fiber optic		82 miles of fiber optic		82 miles of fiber optic		82 miles of fiber optic	
Traffic Signal Mast Arms	328 intersections		250 intersections		220 intersections		190 intersections	
School Zone Safety Improvements	50 schools		50 schools		50 schools		50 schools	
30-yr. Bus Service Plan		\$5,239,380,462		\$2,519,333,223		\$2,519,333,223		\$2,519,333,223
Improvements to Existing Local Routes	38 local routes		38 local routes		38 local routes		38 local routes	
New Local Routes	9 routes		9 routes		9 routes		9 routes	
Express Service	6 Express Bus routes		0 Express bus routes		0 Express Bus routes		0 Express bus routes	
Breeze Service	13 Breeze routes		1 Breeze route		1 Breeze route		1 Breeze route	
Rapid Bus Service	16 Rapid Bus routes		10 Rapid Bus routes		10 Rapid Bus routes		10 Rapid Bus routes	
Community Bus Service Expansion	100% O&M by BCT	\$393,934,240	100% O&M by BCT	\$393,934,240	50% O&M by BCT	\$157,943,270	0% O&M by BCT	\$0
Total Operating Costs		\$14,346,924,554		\$11,599,577,315		\$11,075,503,210		\$10,610,695,303
REVENUES	Assumptions:	Costs:	Assumptions:	Costs:	Assumptions:	Costs:	Assumptions:	Costs:
Status Quo Plan	100% funded	\$3,057,318,162	100% funded	\$3,057,318,162	100% funded	\$3,057,318,162	100% funded	\$3,057,318,162
General Fund (Ad Valorem)	0% funded	\$0	0% funded	\$0	0% funded	\$0	0% funded	\$0
New State Block Grant Funds	6.5% of new svc. cost	\$492,937,854	6.5% of new svc. cost	\$314,730,241	6.5% of new svc. cost	\$282,420,967	6.5% of new svc. cost	\$251,935,453
All New Revenues	2% annual growth	\$151,673,186	2% annual growth	\$96,840,074	2% annual growth	\$86,898,759	2% annual growth	\$77,518,601
Farebox Revenues (New LRT, Bus)	23% for all new svc.	\$1,653,636,763	23% for all new svc.	\$1,023,055,977	23% for all new svc.	\$963,008,777	23% for all new svc.	\$891,463,911
Total Operating Revenues		\$5,355,565,965		\$4,491,944,453		\$4,389,646,665		\$4,278,236,126
General Fund Transfer		\$0		\$0		\$0		\$0
Revenues Minus Costs		(\$8,991,358,589)		(\$7,086,024,507)		(\$6,685,856,545)		(\$6,332,459,177)
CAPITAL								
COSTS	Assumptions:	Costs:	Assumptions:	Costs:	Assumptions:	Costs:	Assumptions:	Costs:
Status Quo Plan	100% funded	\$2,022,943,839	100% funded	\$2,022,943,839	100% funded	\$2,022,943,839	100% funded	\$2,022,943,839
Light Rail Transit (LRT) Infrastructure	23 miles	\$1,796,276,433	23 miles	\$1,796,276,433	20 miles	\$1,566,839,669	14.3 miles	\$1,130,909,817
Light Rail Transit (LRT) Vehicles	65 cars	\$391,048,489	65 cars	\$391,048,489	57 cars	\$338,077,596	43 cars	\$245,378,535
30 yr. Bus Service Plan - Vehicles	467 buses	\$350,919,765	234 buses	\$178,860,475	234 buses	\$178,860,475	234 buses	\$178,860,475
30 yr. Service Plan - Replacement Vehicles	633 buses	\$632,369,960	312 buses	\$309,343,711	312 buses	\$309,343,711	312 buses	\$309,343,711
Community Bus: New & Replacement Vehicles	636 mini-buses	\$104,485,808	636 min-buses	\$104,485,808	636 mini-buses	\$104,485,808	636 mini-buses	\$104,485,808
Transit Infrastructure		\$767,964,134		\$491,457,361		\$386,206,269		\$380,916,977
Third Bus Maintenance Facility	yes		yes		yes		yes	
Fourth Bus Maintenance Facility	yes		no		no		no	
New/Replacement Bus Shelters	3,000 shelters		2,250 shelters		2,250 shelters		2,250 shelters	
Intermodal Centers	9		9		9		9	
Park & Ride Lots	5		5		5		5	
IT Enhancements	100%		100%		50%		50%	
Transit Security Enhancements	100%		42%		31%		29%	
Roadway and Surface Infrastructure		\$791,100,000		\$588,000,000		\$537,300,000		\$500,000,000
Road Capacity Expansion	140 lane miles		83 lane miles		68 lane miles		62 lane miles	
Intersection Improvements	60 intersections		60 intersection		60 intersections		60 intersections	
Bike Lanes/Complete Streets	110 miles		100 miles		98 miles		92 miles	
Sidewalks	492,000 linear ft.		460,000 linear ft.		430,000 linear ft.		390,000 linear ft.	
Greenways	70 miles		65 miles		65 miles		62 miles	
Traffic Signal Improvements	82 miles of fiber optic		82 miles of fiber optic		82 miles of fiber optic		82 miles of fiber optic	
Traffic Signal Mast Arms	328 intersections		250 intersections		220 intersections		190 intersections	
School Zone Safety Improvements	50 schools		50 schools		50 schools		50 schools	
Rapid Bus Infrastructure Enhancements	16 corridors	\$723,536,711	10 corridors	\$498,478,724	10 corridors	\$498,478,724	10 corridors	\$498,478,724
Total Capital Costs		\$7,573,005,360		\$6,380,902,954		\$5,942,544,206		\$5,371,326,001
REVENUES	Assumptions:	Costs:	Assumptions:	Costs:	Assumptions:	Costs:	Assumptions:	Costs:
Status Quo Plan	100% funded	\$869,150,086	100% funded	\$869,150,086	100% funded	\$869,150,086	100% funded	\$869,150,086
FTA 5307 Bus Capital (New)		\$177,178,897		\$88,589,449		\$88,589,449		\$88,589,449
FTA 5307 Rail Capital (New)		\$85,480,750		\$85,480,750		\$73,513,445		\$51,288,450
FTA 5339 Bus and Bus Facilities (New)		\$21,992,542		\$10,996,271		\$10,996,271		\$10,996,271
New Capital Grants (FTA, FDOT)	25% FTA, 25% FDOT	\$3,390,952,680	25% FTA, 25% FDOT	\$2,896,451,477	25% FTA, 25% FDOT	\$2,702,622,103	25% FTA, FDOT 25%	\$2,435,663,000
Total Capital Revenues		\$4,544,754,955		\$3,950,668,033		\$3,744,871,354		\$3,455,687,256
Revenues Minus Costs		(\$3,028,250,405)		(\$2,430,234,921)		(\$2,197,672,852)		(\$1,915,638,745)
TOTAL COSTS:		\$21,919,929,913		\$17,980,480,269		\$17,018,047,415		\$15,982,021,304
TOTAL REVENUES:		\$9,900,320,920		\$8,442,612,486		\$8,134,518,019		\$7,733,923,383
Total Sales Surtax Revenue Required		\$12,019,608,993		\$9,537,867,783		\$8,883,529,397		\$8,248,097,921
Estimated Sales Surtax Revenue Collected		\$12,693,420,319		\$9,520,065,239		\$8,885,394,224		\$8,250,723,208

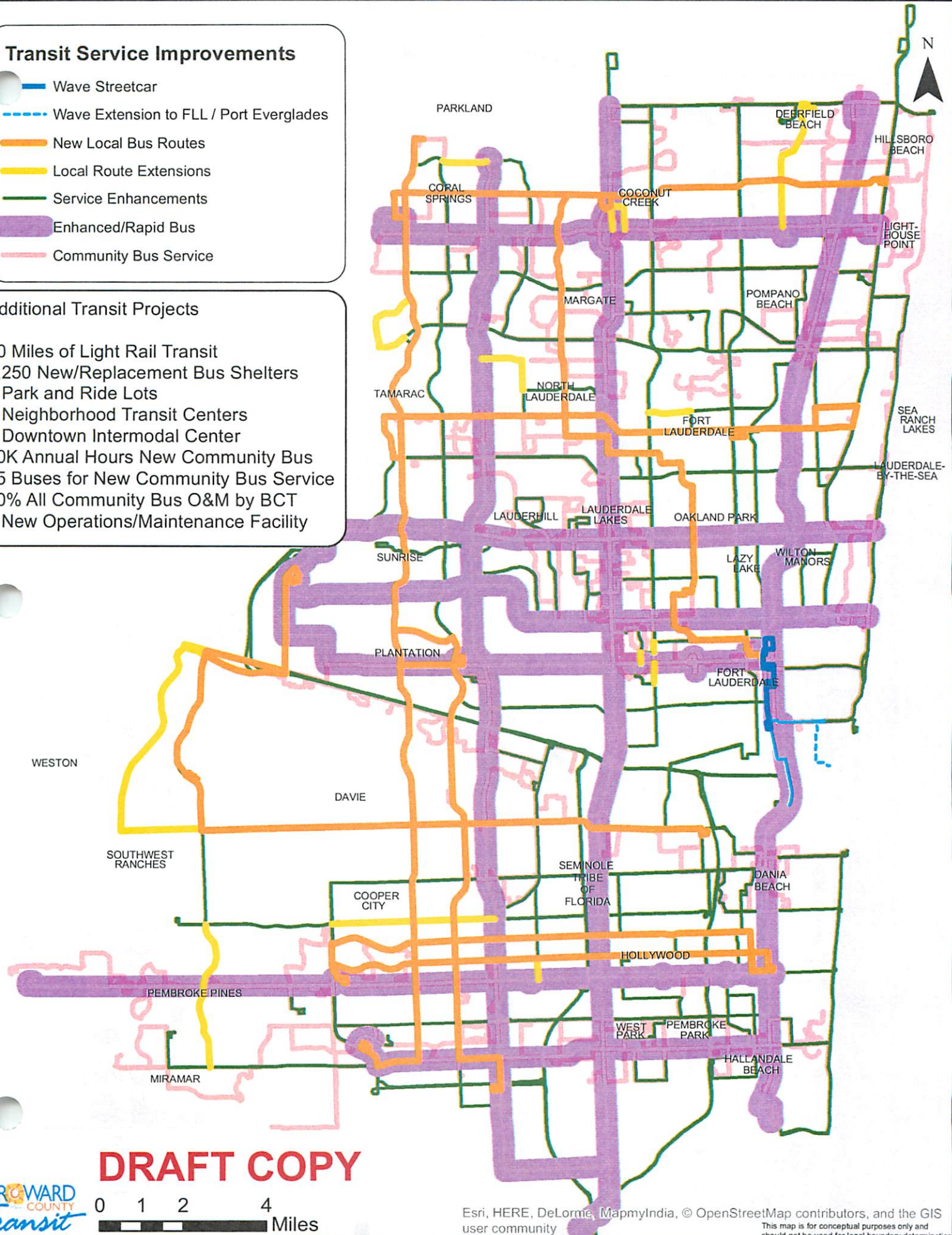
30 Year Transit Vision Plan - 70% Surtax

Transit Service Improvements

-  Wave Streetcar
-  Wave Extension to FLL / Port Everglades
-  New Local Bus Routes
-  Local Route Extensions
-  Service Enhancements
-  Enhanced/Rapid Bus
-  Community Bus Service

Additional Transit Projects

- 20 Miles of Light Rail Transit
- 2,250 New/Replacement Bus Shelters
- 5 Park and Ride Lots
- 8 Neighborhood Transit Centers
- 1 Downtown Intermodal Center
- 50K Annual Hours New Community Bus
- 25 Buses for New Community Bus Service
- 50% All Community Bus O&M by BCT
- 1 New Operations/Maintenance Facility



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70% Plan
POTENTIAL BROWARD COUNTY ROAD-RELATED PROJECTS^a

Types	Anticipated Scope	Benefits	Budgetary Cost	O&M Cost
			Estimate (\$ Mil) ^b	(\$ Mil/yr)
Road Capacity Expansion	Expand capacity of county roads, typically from 4 to 6 lanes, including Complete Streets elements	Traffic Capacity, Complete Streets, Safety	\$138.0	\$0.60
Intersection Improvement	Improve performance of intersections by adding turn lanes, modifying signal phasing, adding bike lanes, adding side walks, improving road shoulders, or adding pedestrian signals	Traffic Capacity, Complete Streets, Safety	\$69.0	\$0.30
Bike Lanes/Complete Streets	Install missing links of bike lanes on major county roads	Complete Streets, Safety	\$92.9	\$0.46
Sidewalks	Install missing links of sidewalks and upgrade curb ramps for ADA compliance	Complete Streets, Safety	\$46.0	\$0.20
Greenways	Install greenways in accordance with Broward County Greenways Master Plan	Complete Streets, Recreation	\$39.4	\$0.17
Fiber Optics Network	Install fiber optic cables to connect traffic signals	Reliability, Redundancy	\$25.0	\$3.75
Mast Arms	Upgrade traffic signals to mast arms at county-owned intersections	System Hardening, Aesthetics	\$121.0	\$0.61
School Zone Safety Improvement	Improve school zone safety by installing signages, adding or improving pavement markings, adding pedestrian crossings, or installing flashing beacons	Safety	\$6.0	\$0.003
Total			\$537.3	\$6.09

^a These potential projects are a partial listing of the current and future needs. They have not been investigated in detail. Evaluation of the site and traffic conditions including right-of-way will determine the feasibility and scope of the projects.

^b Budget-level cost estimates are based on 2015 dollars; includes a contingency for right-of-way and adaptation.

**70% Plan
Broward County Transit Plan Projects**

Project Types	Anticipated Scope	Benefits	Capital Cost (\$ Mil)	30 Year Plan O&M (\$Mil)
BCT Status Quo Plan	Accounts for existing services such as fixed route bus, community bus, and paratransit including operations and capital expenditures to keep BCT in an optimal state of good repair and maintain existing service efficiency/reliability. O&M costs for the 2.8 mile Wave Modern Streetcar are included in this plan.	Financial Stewardship, State of Good Repair, Service Reliability, Provides Funding for Existing Transit System	\$2,022.9	\$6,547.9
Light Rail Transit	Expansions of the Wave Modern Streetcar. New rail segments will create a high capacity network connecting regional scale attractions and destinations. Includes design, construction, rolling stock, operations and maintenance for new light rail lines.	Builds Regional High Capacity Transit Network, Increase Ridership, Increase Transit Mode Share, Opportunities for Transit Oriented Development, Increased Economic Development	\$1,904.9	\$1,667.7
30 Year Bus Service Plan	Service improvements and extensions of existing local bus routes, new local routes, new limited stop "Breeze" routes, and new rapid bus routes. Includes capital, operations, maintenance, and increased staffing necessary to significantly expand bus services.	Increase Ridership, Increase Transit Mode Share, Travel Time Savings, Opportunities for Transit Oriented Development, Complete Streets	\$488.2	\$2,519.3
Community Bus Service	Includes 50% O&M for existing community bus routes funded through partnerships with BCT as well as 50K annual service hours for expansion of the community bus system. Assumes 100% BCT owned minibus fleet.	Increase Ridership, Community Partnerships, Complete Streets, Improved Access to Local Scale Destinations, Complements Fixed Route Bus/Rail Network	\$104.5	\$157.9
Transit Infrastructure	Includes capital projects essential to the function, safety, and state of good repair of a modern expanded transit network. Includes intermodal centers, park and ride lots, information technology upgrades, transit security enhancements, and bus operations/maintenance facilities.	Enhanced Safety and Security, Increase Ridership, State of Good Repair, Regional Connectivity, Modern Technology	\$386.2	\$0
Rapid Bus Corridor Infrastructure Enhancements	Capital project components for creating rapid bus corridors. Assumed at \$2 million/mile to include enhanced bus stations with level boarding platforms, real time passenger advisory signs, information kiosks/ticketing, semi-exclusive Business Access and Transit (BAT) lanes, queue jump lanes, and transit signal priority.	Increase Ridership, Complete Streets, Regional High Capacity Transit Network, Increase Transit Mode Share, Passenger Comfort, Service Reliability and Travel Time Savings	\$498.5	\$0
Total Cost			\$5,405.2	\$10,892.8

MEMORANDUM

TO: Commissioner Lois Wexler

FROM: James D. Rowlee, Senior Assistant County Attorney

DATE: April 11, 2016

RE: **Transportation Surtax**
CAO Files: 16-026.05 & 16-102

During this morning's briefings, this Office was asked to provide legal guidance regarding the purposes for which transportation surtax revenues may be used by municipalities. The only statutory provision authorizing distribution of transportation surtax revenues to municipalities provides that such revenues may be used by municipalities (1) for the planning, development, construction, operation, and maintenance of roads and bridges in the county; (2) for the planning, development, expansion, operation, and maintenance of bus and fixed guideway systems; (3) for the planning, development, construction, operation, and maintenance of on-demand transportation services; (4) for the payment of principal and interest on bonds issued for the construction of fixed guideway rapid transit systems, bus systems, roads, or bridges; and (5) as a pledge for new or refinanced bonds issued for the construction of such fixed guideway rapid transit systems, bus systems, roads, or bridges.


Senior Assistant County Attorney

JDR/dnt

c: Joni Armstrong Coffey, County Attorney