FLORIDA SEAPORT TRANSPORTATION AND ECONOMIC DEVELOPMENT COUNCIL

WEDNESDAY JUNE 7, 2017

10:00 - 10:30 A.M.

Teleconference
Call in Number: (605) 475-2874
Code Number: 9348585
TAB 1
CALL TO ORDER
Florida Seaport Transportation and Economic Development Council

Canaveral Port Authority · Port Citrus · Port Everglades · Port of Fernandina · Port of Fort Pierce
Jacksonville Port Authority · Port of Key West · Manatee County Port Authority · PortMiami · Port of Palm Beach
Panama City Port Authority · Port of Pensacola · Port St. Joe Port Authority · Port of St. Petersburg · Tampa Port Authority
Florida Department of Economic Opportunity · Florida Department of Transportation

AGENDA
Wednesday June 7, 2017
10:00 – 10:30 a.m.
Teleconference

Call in Number (605) 475-2874
Code Number 9348585

1. Call to Order, Chairman’s Welcome
2. Roll Call
3. Update on Seaport Mission Plan
4. Update on Analysis of Import and Export Distribution Center Logistics Network
5. Approval of Reallocation of FY 16/17 and FY 17/18 FSTED Program Funds
6. Other Issues
7. Adjournment

502 East Jefferson
Tallahassee, Florida 32301
www.flaports.org
TAB 2
ROLL CALL
## FLORIDA SEAPORT TRANSPORTATION AND ECONOMIC DEVELOPMENT COUNCIL

### ROLL CALL

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<th>MEMBER</th>
<th>DESIGNEE</th>
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<td>JOHN MURRAY, CANAVERAL</td>
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<td>RANDY OLIVER, CITRUS</td>
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<td>STEVE CERNAK, EVERGLADES</td>
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<td>LAURA DIBELLA, FERNANDINA</td>
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<td>STANLEY PAYNE, FT. PIERCE</td>
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<td>DOUG BRADSHAW, KEY WEST</td>
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<td>MANNY ALMIRA, PALM BEACH</td>
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### WAYNE STUBBS, CHAIR, PANAMA CITY

| AMY MILLER, PENSACOLA |          |
| EUGENE RAFFIELD, PORT ST. JOE |          |
| WALTER MILLER, ST. PETERSBURG |          |
| PAUL ANDERSON, TAMPA |          |

| CISSY PROCTOR, DEPARTMENT OF ECONOMIC OPPORTUNITY | KARL BLISCHKE |
| RACHEL CONE, DEPARTMENT OF TRANSPORTATION | BOB EMERSON |

03/17
TAB 3

UPDATE ON SEAPORT MISSION PLAN
FLORIDA’S SEAPORTS: HIGH PERFORMANCE
2017|2021

FIVE-YEAR FLORIDA SEAPORT MISSION PLAN
Florida Seaport Transportation and Economic Development Council
www.flaports.org
April 10, 2017

Dear Friend,

Florida is consistently a national leader in economic and job growth. Our state’s investments in diversification, private sector job growth and business development have resulted in the creation of more than 1.3 million new jobs in just six years.

The Florida Department of Economic Opportunity supports our partners all across the state as they work to improve opportunities for Florida families and expand our economy. Florida’s seaports and the Florida Ports Council are critical partners in this effort.

Under Governor Scott’s leadership, Florida has invested billions of dollars to upgrade our seaports and expand the state’s freight capacity. Florida ports are some of the most competitive around the globe and are an indispensable asset for our state’s continued growth, as they attract business investment from across the world.

Florida’s nationally ranked seaports have an incredible economic impact on our state. Our 15 seaports are job generators, supporting 900,000 direct and indirect jobs from Pensacola to Key West and representing nearly $118 billion in total economic activity. Investment in Florida ports also helps the state fund other essential needs, as they produce more than $4.2 billion in tax revenue each year. Our seaports provide support to maintain Florida’s position as the premier destination for family vacations. Florida’s cruise industry is an important part of our tourism economy. Cruisers embarking from Florida ports represent 62 percent of all U.S. cruise passengers. This impressive traffic helped Florida welcome nearly 113 million visitors last year.

The 2017 Seaport Mission Plan highlights the investments underway in each of Florida’s ports that will help keep businesses competitive in the international business market so we can continue to grow our share of global shipping and cruising traffic.

The Florida Department of Economic Opportunity is a proud partner in innovating and investing in our state’s ports. With our strong network of competitive Florida ports, I know our state can continue charting a course for economic success.

Sincerely,

Cissy Proctor
Executive Director
OUR MISSION

Ports work to enhance economic vitality and quality of life in Florida by fostering the growth of domestic and international waterborne commerce.

Charged with facilitating the implementation of seaport capital improvement projects, the Florida Seaport Transportation and Economic Development Council (FSTED) consists of the port directors of the 15 publicly-owned seaports and a representative from both the Department of Transportation and the Department of Economic Opportunity. The Florida Ports Council administers the FSTED program and staffs the Council.

OUR MANDATE

Florida’s deepwater seaports, as mandated by Chapter 163, Florida Statutes, prepare master plans to guide their development and expansion. Regularly updated plans, consistent with the comprehensive plans of the seaports’ respective local governments, establish goals and objectives, address forecasted needs, and identify five-year capital seaport improvement programs to implement.

OUR GOALS

- Develop world-class cargo and cruise facilities to enhance Florida’s global competitiveness.
- Build system-wide, seamless intermodal facilities to move port goods and passengers efficiently and cost-effectively.
- Capitalize on increased north-south trade and the Panama Canal expansion to capture more direct all-water service and feeder calls.
- Strengthen and diversify strategic seaport funding to ensure vital and timely improvements.
- Advocate continued statewide economic development that includes investment in major economic engines - Florida seaports.
- Support security measures that balance compliance with an efficient flow of seaport commerce.
2016
Florida Seaports at a Glance

$50.1 billion
Value of containerized cargo moved (6.4 percent increase)

3.5 million
TEUsHandled (0.9 percent increase)

15.5 million
Cruise passengers served (1.4 percent increase)

$2.8 billion
Programmed in improvements over the next five years to accommodate growing business and capture new opportunities

FLORIDA CARGO TONNAGE
• Florida’s waterborne international and domestic cargo in Fiscal Year 2015/2016 increased 4.2 percent, from 103 to 107.4 million tons.
• Container cargo tonnage grew 4 percent and 20-foot equivalent units (TEUs) grew by 0.9 percent, dry bulk grew by 1.8 percent, and liquid bulk by 5.8 percent.
• Eight out of eleven of the state’s cargo ports increased tonnage.
• Domestic cargo tonnage jumped 16.1 percent to 50.6 million tons, representing 47.1 percent of all cargo moving through Florida seaports.
• The multi-year trend shows rising waterborne imports and falling exports. Domestic cargo, which is typically stable, increased dramatically in 2016 after several years of relative stability.
• In FY 2015/2016, a total of 15.5 million passengers cruised from Florida’s ports, up 1.4 percent from FY 2014/2015.

FLORIDA INTERNATIONAL TRADE VALUE
• 2016 total value of trade (including air and other gateways) fell 1.8 percent to $147.2 billion; waterborne trade by itself decreased by 8 percent – to $79.3 billion from $86.2 billion.
• At $50.1 billion, containerized cargo increased slightly (up from $49.8 billion), and represented a slightly higher share (at 63.2 percent) of the waterborne cargo value than in 2015.
• Florida ranked seventh nationally for trade exports and tenth for imports.
• Waterborne trade comprises the majority of the state’s total trade, by value – now 58.6 percent.
• Waterborne imports moved through Florida seaports fell by 3.2 percent in 2016, and exports fell by 14.6 percent.
• In 2016, the state’s deficit increased, with an import-export ratio for all modes including air of 51:49 – the second year in a row of deficit, after years of surplus.
• The state’s widening waterborne import-export ratio was 60:40 percent.
• 11 commodities contributed more than $1 billion in import values, and five export commodities contributed more than $1 billion. Vehicles, except Railway or Tramway, and Parts is the top waterborne import and Nuclear Reactors, Boilers, Machinery, and Parts Thereof is the top export commodity.

DIVERSITY OF TRADING REGIONS

• Florida seaports trade with almost every nation.
• Florida seaports handled 6.6 percent of U.S. global waterborne export trade, and a growing percentage of U.S. waterborne export trade with South and Central America and the Caribbean – 25.3 percent.
• Florida seaports handled 4.7 percent of U.S. global waterborne import trade, and 19.7 percent of waterborne imports from South and Central America and the Caribbean.
• The top three trading regions are South and Central America and the Caribbean, Asia, and Europe; together they account for 94.3 percent of all trade through the state’s seaports.
• For the second year in a row, Asia and the Middle East ranked first, above South and Central America and the Caribbean, for imports.
• Florida seaports recorded a large but narrowing trade surplus with trading partners to the south in 2016, exporting $7.8 billion more than they imported from the region.
• Florida’s waterborne trade deficit with Asia widened by $12.3 billion to $14.0 billion in 2016.
• China remained the leading waterborne import trade partner, Brazil is the top export partner, and China leads for two-way trade.
BUILDING GLOBAL PRESENCE

Seaports are critical conduits for Florida and U.S. domestic cargo movements and global trade. They help build imports and exports, create new trade and logistics jobs, and expand the value-added services supporting global businesses.

Florida’s 15 established and emerging seaports are leaders in the effort to continuously enhance the state’s economy. They are important players in achieving Florida’s global vision:

- Supporting and leading export promotion efforts.
- Upgrading facilities to best-in-class.
- Partnering for investments to expand the number of direct global connections and optimizing supply chains.
- Improving the strategic presence of Florida at a national level to help shape federal action on trade and ports.
- Marketing the assets of Florida’s system of seaports and overall freight network.

Florida Ports
1. Port Canaveral
2. Port Citrus
3. Port Everglades
4. Port of Fernandina
5. Port of Fort Pierce
6. JAXPORT
7. Port of Key West
8. Port Manatee
9. PortMiami
10. Port of Palm Beach
11. Port Panama City
12. Port of Pensacola
13. Port of Port St. Joe
14. Port of St. Petersburg
15. Port Tampa Bay
# FLORIDA SEAPORTS

## RESOURCE LIST

### FLORIDA PORTS COUNCIL STAFF

Doug Wheeler, President and CEO  
Niki McKinell, Vice President of Public Affairs  
Toy Keller, Vice President of Programs and Planning  
Mike Rubin, Vice President of Governmental Affairs  
Christy Gandy, Director of Administration

### FLORIDA SEAPORTS

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<tr>
<th>Port Canaveral</th>
<th>PortMiami</th>
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<tbody>
<tr>
<td>445 Challenger Road, Suite 301</td>
<td>1015 North America Way</td>
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<tr>
<td>Cape Canaveral, FL 32920</td>
<td>Miami, FL 33132</td>
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<tr>
<td><a href="http://www.portcanaveral.com">www.portcanaveral.com</a></td>
<td><a href="http://www.portmiami.biz">www.portmiami.biz</a></td>
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<tr>
<th>Port Everglades</th>
<th>Port of Palm Beach</th>
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<tr>
<td>1850 Eller Drive</td>
<td>1 East 11th Street, Suite 600</td>
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<tr>
<td>Fort Lauderdale, FL 33316</td>
<td>Riviera Beach, FL 33404</td>
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<tr>
<td><a href="http://www.porteverglades.net">www.porteverglades.net</a></td>
<td><a href="http://www.portofpalmbeach.com">www.portofpalmbeach.com</a></td>
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<th>Port of Fernandina</th>
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<tr>
<td>501 N 3rd Street</td>
<td>5321 West Highway 98</td>
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<tr>
<td>Fernandina Beach, FL 32034</td>
<td>Panama City, FL 32401</td>
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<td><a href="http://www.portoffernandina.org">www.portoffernandina.org</a></td>
<td><a href="http://www.portpanamacityusa.com">www.portpanamacityusa.com</a></td>
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<tr>
<td>2300 Virginia Avenue</td>
<td>700 South Barracks Street</td>
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<td>Jacksonville, FL 32206</td>
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<tr>
<td>201 Williams Street</td>
<td>250 8th Avenue</td>
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<td>Key West, FL 33040</td>
<td>Saint Petersburg, FL 33701</td>
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<td>300 Tampa Bay Way</td>
<td>1101 Channelside Drive</td>
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<td>Palmetto, FL 34221</td>
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<td><a href="http://www.porttb.com">www.porttb.com</a></td>
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<td>Tab 4</td>
<td>Update on Analysis of Import and Export Distribution Center Logistics Network</td>
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Attracting Distribution Center and Related Logistics Investment to Florida to Anchor Traffic through Florida Ports

Florida Seaport Transportation and Economic Development Council

Solutions for growing economies

April 19, 2017
Tallahassee, FL
CPCS Team

Marc-Andre Roy
Project Director

Elizabeth Drake
Project Manager / Senior Analyst

Analytical Team

Vivek Sakhrami
Senior Analyst

Chris Steele
Site Selection Expert

Paul DeMariano
Intermodal Port
Sector Expert

Chelsea Gurr
GIS Analyst

Collin Perciballi
Economic Development

Bernie List
Port Sales / Marketing Expert
3 reasons why CPCS Team can maximize value for the Council

Our understanding of the project

Approach and work plan

Questions and discussion
1. Established track record in successful investment attraction

Identify Region’s Value Proposition – Specific to Target Sectors

Develop the Pitch (and supporting material)

Make the case and secure investments

Selection of shippers that CPCS helped pitch to:

![The Home Depot](image1.png)  
![Target](image2.png)  
![RONA](image3.png)  
![Alibaba.com](image4.png)

CPCS | Solutions for growing economies
2. Understanding of factors driving location investment decisions

Site selection factors by type of logistics activity

<table>
<thead>
<tr>
<th>LOCATION CRITERIA</th>
<th>TYPE OF LOGISTICS FACILITY</th>
<th>Distribution Center</th>
<th>Port</th>
<th>Intermodal Terminal</th>
<th>Transload Terminal</th>
<th>TLC</th>
<th>Hub Terminal</th>
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Key:
- ● Primary Factor
- ○ Important Factor
- ○ Lesser Factor

Opportunities for inward investment are driven by what the market (individual companies) wants:

- Market proximity and access to consumer base
- Creation of industry clusters, critical mass and associated economies of scale
- Competitive transportation service options between markets
- Available and affordable skilled/unskilled labor
- Relatively low costs for utilities
- A competitive tax & business environment
- “Construction ready” industrial land
- Access to export facilities

Source: Investment Consulting Associates

Reverse Site Selection examines available sites the way a company would, and matches opportunity to site.
3. Florida ports sector knowledge and relationships

Maritime Advisors familiar with Florida seaports

- Both team members former Port CEOs
- Florida experience includes:
  - Development of Port Everglades and Jacksonville marine terminals
  - Trade Development Manager, Port of Tampa
  - Port Marketing Director, Port of Miami
  - CEO/President of Liner service between Florida and Mexico
  - Facility and business development on the East Coast of Florida, directly related to goods movement trends
- Appreciation of regional dynamics and role of FSTEDC
Presentation map

3 reasons why CPCS Team can maximize value for the Council

Our understanding of the project

Approach and work plan

Questions and discussion
Our general philosophy on this project

This is not a traditional “port” market study
- The focus is “Florida” as a destination for transportation and logistics sector investment

Focus on “anchoring” traffic to Florida
- Opportunities to attract investment that will create sustained demand for Florida seaports

Tie opportunities to Florida “value proposition”
- Target and tailor the strategy to freight markets (inbound/outbound) that can be better served by developing a footprint in Florida
How to capture “Florida” freight moving through competing gateways?
3 reasons why CPCS Team can maximize value for the Council

Our understanding of the project

Approach and work plan

Questions and discussion
Approach tied to 4 key questions

What do Florida’s DC and logistics clusters look like, and what are their structural strengths and weaknesses in terms of investment attraction?

With whom does Florida compete for DC and logistics-related investments (regional “battleground”), and for what key commodities / market segments?

What is the value proposition (marketing “pitch”) for each of Florida’s key port regions that will draw investors and anchor traffic to Florida and Florida’s seaports?

How do the enabling investment conditions in Florida compare to these competing markets?

**Product:** Strategy and related marketing material to attract more DC, warehousing and other logistics investment and operations to Florida
Work plan: 5 steps

Step 1: Inception
- Deliverable #1: Final Work Plan

Step 2: Assess Florida’s Current Position in T & L Sector

Step 3: Identify and Assess Regional Competition (“Battleground”)
- Deliverable #2: Overview of Florida’s T & L Sector
  - Client Review

Step 4: Compare Florida to Regional Competing Ports and Identify Strengths and Weaknesses

Step 5: Define Florida’s Competitive Value Proposition and Develop Marketing Plan
- Deliverable #3: Overview of Regional / Competing Sector and Comparison to Florida
  - Client Review

- Deliverable #4 (draft and final): Marketing Plan and “Pitch”
  - Client Review

Legend
- Team Work
- Client review
- Deliverable
"Battleground" is zone where location/gateway is discretionary

What is Florida’s "battleground" for DC investment?
Other features of our team's approach

- Building on existing work, including 2015 Florida Seaport System Plan
- Use of reliable, comparable data, including Boyd Group data
- Tagging opportunities and "the pitch" to specific shipper segments
- Use of Working Papers (building block reports)
- Visual communication
Recognized clear, visual communications

Sample CPCS deliverables:
22 weeks to draft final marketing plan and material

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<th>Milestones and Deliverables</th>
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<td>Deliverable #1: Final Work Plan and Schedule</td>
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<td>Deliverable #2: Overview of Florida's Existing Logistics Network and Market</td>
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<td>Deliverable #3: Comparative Overview of Florida and Competing Regions</td>
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<td>Deliverable #4 (Draft): Marketing Plan and Pitch</td>
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<td>Deliverable #4 (Final): Marketing Plan and Pitch</td>
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Legend:
- Work Activity
- Client Review
- Deliverable
Presentation map

3 reasons why CPCS Team can maximize value for the Council

Our understanding of the project

Approach and work plan

Questions and discussion
Questions and discussion

Florida seaports compete

- How to manage issue of alternative locations for DC investment within Florida?
- How many locations (and what locations) to focus on?
- How might decisions for DC establishment in one area impact other ports and regions?

How does the Council see strategy “implementation”?

- Economic development strategy?
TAB 5
APPROVAL OF REALLOCATION OF FY 16/17 AND FY 17/18 FSTED PROGRAM FUNDS
## Proposed Reallocations of FY 16/17 and FY 17/18 FSTED Program Funds
June 7, 2017

<table>
<thead>
<tr>
<th>Port</th>
<th>Available for Reallocation</th>
<th>From: (Project)</th>
<th>Fiscal Year</th>
<th>To: (Project)</th>
<th>Fiscal Year</th>
<th>Proposed Reallocation</th>
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</thead>
<tbody>
<tr>
<td>Ft. Pierce</td>
<td>$255,000.00</td>
<td>Fishermans Wharf Property Acquisition</td>
<td>FY 16/17</td>
<td>Fisherman's Wharf Bulkhead</td>
<td>FY 17/18</td>
<td>$255,000.00</td>
</tr>
<tr>
<td>Miami</td>
<td>$2,325,000.00</td>
<td>Inland Cargo and Container Distribution Center</td>
<td>FY 17/18</td>
<td>Upland Cargo Improvements</td>
<td>FY 17/18</td>
<td>$2,325,000.00</td>
</tr>
<tr>
<td>St. Petersburg</td>
<td>$1,057,832.00</td>
<td>Marine Science Research Facility</td>
<td>FY 16/17</td>
<td>Marine Science Research Facility</td>
<td>FY 17/18</td>
<td>$1,057,832.00</td>
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</table>
May 26, 2017

VIA: USPS MAIL and E-mail

Wayne Stubbs,
FSTED Chairman
Florida Ports Council
502 East Jefferson Street
Tallahassee, Florida 32301
www.flaports.org

Reference: Reallocation of FSTED Funds
Port of Fort Pierce

Dear Mr. Stubbs:

We respectfully request the reallocation of funds, and request that funds be moved from the Fisherman’s Wharf Property Acquisition project (Item 438791-1, FY 16/17), to the Fisherman’s Wharf Bulkhead Rehabilitation and Dredging Basin project (Item 440703-1-94-01, FY17/18). The Fisherman’s Wharf Bulkhead Rehabilitation and Basin Dredging project is an approved FSTED project for the Port of Fort Pierce and will be under design this year (FY17). Follow-on construction work for the project is expected to start in FY18.

We have contacted the Florida Department of Transportation (FDOT) District IV Seaport Coordinator, Lauren Rand, and FDOT is aware that this request is forthcoming. We believe that this reallocation request, at this time will meet the Florida Department of Transportation’s target and schedule to reprogram funds in the work program.

We appreciate your assistance and partnership on these projects, and value the continued relationship that we have with the Florida Ports Council and the Florida Department of Transportation.
If you should have any questions, please do not hesitate to contact me at 772 462-1491 or by email at crocek@stlucieco.org.

Sincerely,

Kyle Croce, P.E., Port Engineer, Port of Fort Pierce, St. Lucie County FL

cc Email Only:
Toy Keller, Vice President, Programs and Planning, Florida Ports Council
Lauren Rand, CPM, District Seaport Coordinator, Florida Department of Transportation
Jack Andrews, P.E., City Engineer, City of Fort Pierce
Stan Payne, Port Director, Port of Fort Pierce
Don West, P.E., Public Works Director, St. Lucie County
May 26, 2017

Mr. Wayne Stubbs  
Chairman  
Florida Ports Council  
502 E. Jefferson Street  
Tallahassee, Florida 32301

Re: Reallocation of FSTED Program Funds

Dear Mr. Stubbs:

PortMiami respectfully requests the reallocation of FSTED funding for FY2018. There is currently $2,325,000 in FSTED/PORT funds allocated to the Inland Distribution Center project. We are requesting that funding be reallocated to the Upland Cargo Improvements project. Respectfully, I would like to reallocate the funding to the following project:

Project Name: Upland Cargo Improvements

FSTED Requested Funding: $2,325,000 PORT Funds

Reason for Reallocation Request: PortMiami expected to begin the development of an inland port in FY2016. This project has been delayed and the project will not come to fruition prior to the deadline for expensing this grant allocation.

Project Status and Funding: In the design phase and programmed in capital budget.

Project Cost: $22.6 million design and construction

Project Scope: Design and construction of cargo yard infrastructure for the installation of eRTGs, cargo gate modifications, and other related infrastructure improvements.

SeaCip Approval Number: PFS0001319 Cargo Container Yard Improvements

Funding for the Upland Cargo Improvements is already approved by the County and programmed in SeaCIP. Due to capacity issues PortMiami needs to move forward with converting existing cargo land to be equipped with eRTGs as well as modify the cargo gates to allow streamlined passing of container trucks. It is anticipated that conversion of 10 acres of land to eRTGs, the Port will be able to handle an additional 50,000 TEUs of growth. Additionally, with the gate improvements, turning times and wait times will be reduced. With the additional capacity and increased efficiency, funding of this initiative will certainly generate a solid return on investment for both PortMiami and the State of Florida.

Sincerely,

Kevin Lysheyke  
Deputy Director, PortMiami
May 26, 2017

Mr. Wayne Stubbs  
Chairman FSTED  
Florida Ports Council  
502 E. Jefferson Street  
Tallahassee, Florida 32301

Dear Chairman Stubbs:

The approved and funded Port of St. Petersburg FSTED Project for development of a Marine Science/Research Facility has been delayed.

We would like to re-program the FY-16/17 FSTED funds for this project in the amounts of $750,000 and $307,832, to FY-17/18.

We plan to provide a match and execute the JPA for these funds during FY-17/18.

Sincerely,

[Signature]

Walter S. Miller  
Port Director  
Port of St. Petersburg
TAB 6
OTHER ISSUES
TAB 7

ADJOURNMENT