

Seaport Statewide Strategic Visioning and Planning Process

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Northeast and Central Coast Regional Seaports Workshop August 3, 2006, at Port of Jacksonville, 10:00-3:00 PM

“If you do not know to which port you are sailing, no wind is a good one.” - Seneca
“I skate to where the puck will be, not to where it’s been.” - W. Gretsky
“The future ain’t what it used to be. -Y Berra

FACILITATORS’ WORKSHOP SUMMARY

”To create an umbrella strategic Florida seaports vision and plan through collaboration with transportation partners that responds to and reflects the demands of the Florida Seaport business model.”

***Meeting Design and Facilitation:
Charles A. Towsley, PPM, Maritime Directions Inc.
Robert M. Jones & Hal Beardall
Florida State University, Florida Conflict Resolution Consortium***



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Facilitator’s Workshop Summary

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EXECUTIVE SUMMARY

Rick Ferrin, Director of the Port of Jacksonville, welcomed the participants to this regional workshop convened by the Ports Council. Charles A. Towsley, PPM, Maritime Directions Inc., thanked Mr. Ferrin, for hosting. On behalf of the Florida Ports Council and the Ports Directors, Mr. Towsley presented an overview of the Florida Seaports collective mission and the proposed Florida Seaports planning process. He noted this effort was initiated at the June, 2006 joint meeting of the Florida Ports Council and FSTED in response to a recently released May, 2006 report, “Florida Seaports: Conditions, Competitiveness, and Statewide Policies, Draft Final Report” prepared by Cambridge Systematics, Inc. for the Florida Department of Transportation.

He suggested the overall purpose for this strategic planning effort is to create an umbrella strategic Florida seaports vision and plan through collaboration with statewide and regional transportation partners that responds to and reflects the demands of the Florida seaport business model. He reviewed the sequence of regional and statewide meetings that have been and will be convened noting there would be an additional regional workshop in Tampa on August 4 and a users meeting in Ft. Lauderdale on August 15, all leading to a statewide summit in August 30-31 in Tampa.

Mr. Towsley then introduced the meeting facilitators, Bob Jones and Hal Beardall from the Florida Conflict Resolution Consortium, based in Tallahassee at FSU and in Orlando at UCF. Following brief introductions the facilitators noted the perspectives contributing to the workshop review of shared regional perspectives on the business models and key strategic issues included: Port Directors, their staff and technical consultants, FDOT District staff, cargo and cruise port user representatives and rail partners.

Mr. Towsley introduced a list of seaport plans and related partner plans that are part of the context of consideration of a statewide and regional strategic Florida seaports plan. The facilitators invited participant comments which focused on:

- Updates on individual seaport master plans and the opportunity to work more closely and coordinate with FDOT Districts in these updates as well as the need to clarify with FDCA and FDOT the interpretation of the port’s DRI exemption.
- The link between the FDOT and ports planning efforts and the Florida Transportation Commission’s corridor initiative.

The participants reviewed the range of partners and their roles in planning for Florida's seaports and their role in state, regional and local economies. The participants discussed and added to a starter list of potential partners. The facilitators invited participant comments which focused on:

- Metropolitan Planning Organizations and Ports involvement with them in regional planning, TRIP program opportunities, and freight policy issues including a new freight advisory committee for First Coast MPO.
- Federal partners and regulators in the context of transportation planning and funding.
- State and federal security agencies and the need for better coordination.

Workshop participants reviewed and refined draft starter list of trends, headwinds and tailwinds. Global and National trends identified included increasing security costs and demands, limited funds on the national level and insurance costs. Regional trends included focus on location of manufacturing closer to the ports and strained financial resources for infrastructure investment.

Opportunities for Seaports statewide and regionally that participants identified included: possibility of developing more distribution centers in land, greater cooperation of ports in the region, container trade growth, proximity to Latin America and Caribbean, and developing a statewide capacity to market the ports internationally.

Challenges for seaports statewide and regionally that participants identified included: federal and state permit timing and funding for maintenance and new dredging to remain competitive and accommodate larger ships; weight limitations on Florida roads compared with neighboring states, maintaining local truck routes in terms of port access; and security costs, environmental issues surrounding threatened or endangered marine species.

Each Port Director provided an overview of the key components for their business planning models. Participants then reviewed, refined and ranked the importance (from (5) Critically important to (1) less important) of a draft set of shared needs drawn from the seaport business planning models in the region and the Five-Year Plan to Achieve the Mission of Florida Seaports. The facilitators noted a lower ranking on the level of importance may suggest the issue is already being addressed. The shared needs are listed in ranked priority order below in terms of importance of each to the region.

1. **Improve inter- and intra-regional freight and passenger mobility connectivity in transportation corridors.** (*Regional Importance Ranking= 4.7*)
2. **Support waterside navigation improvement that can accommodate dynamics of shipping market vessel changes in a timely manner.** (*Regional Importance Ranking= 4.5*)
3. **Promote Ports as regional economic engines. Retain and stimulate economic development & job growth- ports as economic engines of their local communities regions, state and nation.** (*Regional Importance Ranking = 4.4*)
4. **Encourage public-private partnerships that maximize financial resources and collaboration between ports, the state and the private sector industry, local government and communities.** (*Regional Importance Ranking = 4.4*)
5. **Ensure a safe, secure, sustainable and cost effective logistics chain as part of a truly intermodal transportation system for the transport of people and goods through seamless connections while ensuring a safe, secure, sustainable and cost effective logistics chain for transport of people and goods.** (*Regional Importance Ranking = 4.3*)

6. **Improve throughput of cargo on port at landside terminal and cargo handling systems. Port capacity improvements to enhance throughput of cargo on port at landside terminal and cargo handling system upgrades.** (*Regional Importance Ranking = 4.3*)
7. **Address port user needs. Provide market sensitive facility and service costs to port users to retain and expand business opportunities.** (*Regional Importance Ranking = 4.3*)
8. **Promote regional cooperation to maximize use of resources and create synergies to benefit both public and private sector freight and passenger interests throughout Florida.** (*Regional Importance Ranking = 3.9*)
9. **Promote competitive market assessment, port diversification and rationalization regarding highest and best use. Ports are faced with significant challenges in sustaining growth and diversifying their business base.** (*Regional Importance Ranking = 3.9*)

Participants then reviewed, refined and ranked their level of agreement (*from 5=Strongly Agree to 1=Disagree*) of a draft starter list of guiding principles that could inform the development of the seaports strategic plan.

Substantive Planning Principles

1. In order to strengthen the state's overall network of seaports that handle varied commodities and serving different trade lanes and passenger/cruise service, the Florida seaport strategic plan should reflect the input of the state's 14 deepwater seaports and the demands of the Florida seaport business model. (*Regional Agreement Ranking= 4.5*)
2. To sustain a Florida seaport system as a competitive international trade network that fosters economic development, constant market vigilance and investment flexibility will be required. (*Regional Agreement Ranking= 4.3*)
3. The Florida seaports must find and build into the strategic plan the appropriate balances commerce, global competition and mobility with security. (*Regional Agreement Ranking= 4.4*)
4. The Florida seaports must find and build into the strategic plan the appropriate balance between mobility and the seaport impacts on the environment and community. (*Regional Agreement Ranking= 4.3*)

Planning Process Principles

1. The development of the seaport strategic plan should be a collaborative effort directly involving and engaging the state's 14 deep water ports and all levels of government, private sector users and owners of Florida's trade and transport system, both cargo and passenger interests and all modes of transportation. (*Regional Agreement Ranking= 4.2*)
2. The Seaports and their partners should engage in a process to build understanding and consensus on the needs, policies and strategies to ensure Florida's competitiveness in the global market. (*Regional Agreement Ranking= 3.8*)

Mr. Towsley thanked the participants for their participation and input and Jaxport for hosting the meeting. He reminded them of the August 30-31 Seaport Summit in Tampa and encouraged them to let other users and partners know of the opportunity to provide input through the online survey and workshops. The facilitators noted the participants would be notified when the workshop summary is posted on the Ports Council website.

**Northeast and Central Coast Regional Seaports Workshop
Seaport Statewide Strategic Visioning and Planning Process
August 3, 2006, at Port of Jacksonville, 10:00-3:00 PM**

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Facilitator’s Workshop Summary

I. Welcome, Introductions and Review of Agenda

Port of Jacksonville director, Rick Ferrin ,welcomed the participants to JAXPORT , which hosted the regional workshop. On behalf of the Florida Ports Council and the Ports Directors, Charles A. Towsley, PPM, Maritime Directions Inc., provided background on the how the Ports Council and Florida Seaport Transportation and Economic Development Council are looking to constructively respond to the May, 2006 Cambridge Systematics report for the Florida Department of Transportation. Mr. Towsley reviewed the purpose of the workshop: to engage representatives of seaports, their users and partners in the exploration how to create an umbrella strategic Florida seaports vision and plan through collaboration with transportation partners that responds to and reflects the demands of the Florida seaport business model. He noted there would be an additional user workshop in Ft. Lauderdale on August 15 leading to a statewide summit on August 30-31, in Tampa.

Mr. Towsley then introduced the meeting facilitators, Bob Jones and Hal Beardall from the Florida Conflict Resolution Consortium, based in Tallahassee at FSU and in Orlando at UCF. Mr. Towsley noted their work in facilitating statewide stakeholder committees on statewide transportation plans (e.g. the FTP 2025, FTP 2020 and the Strategic Intermodal System) as well as helping find solutions between ports and their host communities on master plans and between ports and their regulators on issues such as dredging permits. The facilitators asked participants to offer brief introductions and at the conclusion noted the perspectives contributing to the workshop review of shared regional perspectives on the business models and key strategic issues. (See Appendix # 3 for a list of participants.) Finally the facilitators reviewed the workshop agenda and guidelines for a constructive discussion.

II. Overview of the Proposed Seaports Business Model Action Planning Process and Framework

Mr. Towsley presented an overview of the Florida Seaports collective mission and the proposed Florida Seaports planning process that was initiated at the June, 2006 joint meeting of the Florida Ports Council and FSTED in response to a recently released May, 2006 “Florida Seaports: Conditions, Competitiveness, and Statewide Policies, Draft Final Report” prepared by Cambridge Systematics, Inc. for the Florida Department of Transportation. He suggested the overall planning process purpose is to create an umbrella strategic Florida seaports vision and plan through collaboration with statewide and regional transportation partners that responds to

and reflects the demands of the Florida seaport business model. Towards that end, he reviewed the following the sequence of regional workshops and statewide meetings:

- Convene three regional seaports workshops – Miami, July 14, Jacksonville, August 3, and Tampa August 4, - focused on identifying shared business model regional and statewide needs, key strategic issues and guiding principles and planning assumptions.
- Convene a users workshop in Ft. Lauderdale on August 15.
- Convene a Statewide Seaports Strategic Planning Summit, August 30-31 in Tampa that will seek to incorporate the results of the regional workshops in building agreement on a proposed statewide strategic planning framework for Florida seaports, a vision of success statewide and in regions around the state, guiding planning principles and assumptions, and key issues and business strategies for addressing statewide and regional seaports challenges and opportunities that could be incorporated into a statewide strategic ports plan.
- Presentation of Summit results and recommendations to the Florida Ports Council Finance Committee (September 6, 2006) Florida Transportation Commission (September 7, 2006) and the Florida Maritime Leadership Conference (September 28, 2006).

III. Context for Statewide and Regional Seaport Planning

Mr. Towsley introduced a list of seaport plans and related partner plans that are part of the context of consideration of a statewide and regional strategic Florida seaports plan and the facilitators invited participant comments:

Seaport Master Plans (9J5)

Port Director Comments:

- Port of Fernandina- updated in '03. Another year and half will update again.
- Jaxport- in process today. Update EARS, working with DCA- new requirements for DRIs being considered (will be sharing with other ports). General in nature to keep flexible.
- Port Canaveral- In process today. (ditto Jaxport comments)
- Port of Ft. Pierce- 2002 adopted port master plan through a facilitated process.
- FDOT- local facility takes lead. Trying to tie in better to regional and local infrastructure planning and investments. Complex task which needs partners working together to get it right

Five-Year Plan to Achieve the Mission of Florida's Seaports.

MPO Long Range and Short Range Transportation Plans

Workshop Participant Comments

- Freight advisory committees being formed.

Local Comprehensive Plans

Florida 2025 Transportation Plan

Strategic Intermodal System Plan: SIS Seaport Connectors:

Port of Fernandina: I-95 to SRA1A to 8th Street to port entrance; Front street to port entrance. *Port of Jacksonville:* Talleyrand Marine Terminal- I95 to US 1 to Phoenix Ave to 21st Street to North Talleyrand Ave to 11th St. entrance. Blount Island Marine Terminal: SR 9A to SR 105 to Dave Rawls Blvd, Blount Island Road to entrance; Dames Point Marine Terminal: SR 9A to SR 105 to August Dr to entrance. *Port Canaveral:* SR 528 directly to southern port terminals; SR 528 to SR401 to northern port terminals.

Strategic Regional Policy Plans

FDOT District Work Plans

Workshop Participant Comments

- How does this tie into the Florida Transportation Commission's and Governor's corridor focus? Important for Ports to participate in the process. FTC looking at corridor needs and financing (public/private) issues in terms of competitiveness. SIS laid out criteria for what qualifies as a SIS facility and pointed to corridor planning as a next step. Looking at in state and interstate movement of freight.
- Federal Atlantic Commerce corridor

IV. Partnership Roles

The participants reviewed the range of partners and their roles in planning for Florida's seaports and their role in state, regional and local economies. The participants refined a starter list of potential partners.

The 14 Deep Water Port Directors, Staff and Governing Boards

Florida Seaport Transportation and Economic Development Council (FSTED –
includes key state agency partners)

Florida Ports Council

Florida Ports Financing Commission

Florida Seaport Stakeholders (including the Trade and Transport Council)

The Florida Department of Transportation

Headquarters- Intermodal Division and Planning
District Offices

Florida Ocean Alliance

The Florida Transportation Commission

Local Government

Metropolitan Planning Organizations

Other?

Workshop Participant comments

- USDOT- FHWA- Freight Office- unveiled in Jan 06 a National Freight Policy Federal freight issues. Which federal agency has taken a leadership role. Need one of them to step up.
- MTSNAC- National Council- providing advice to Secretary of Transportation. Tying in public private financing and MPO engagement. Funding won't come from

Federal Government. Should interface with committee. No unified national freight policy.

- ASHTO- active in freight policy issues- for each mode. National bottlenecks identified.
- First Coast MPO- engaging industry and business following a recent freight study. Problem of the 5 and 20-year programs/planning. Often frustrating for business.
- Short sea coastal shipping- doesn't seem to be a market demand. Container/feeder business developing. Trailer off the highway not a demand. Florida tax law an obstacle for short shipping.
- Coast Guard water side issues? Review and approval of security plans. Homeland Security
- FDLE stateside- e.g. gate operations.
- Maritime Administration? MARAD- Haven't had a comparable to FAA and airports (double edged sword). Responsible to coordinate with port directors for military deployments. Play part with Coast Guard in approving grants at federal level for port security.
- Army Corps- navigation, dredging.

V. Regional Trends, Headwinds and Tailwinds

Workshop participants reviewed and refined draft starter list of trends, headwinds and tailwinds taken from the online survey responses and previous regional workshops.

A. Trends Affecting Ports

1. Global and National Trends

Northeast and Central Coast Ports-Online Survey Comments

- Greater security demands
- Highway congestion
- Harbor Dredging for larger vessels.
- Security.

Northeast and Central Coast Regional Seaports Workshop Comments

- Focus on the cargo side? What about cruise.
- Demographic changes and congestion issues
- Wright Whale issue? FWS Endangered species?

2. State and Regional Trends

Northeast and Central Coast Ports-Online Survey Comments

- Strained financial resources for infrastructure investment.
- strained financial resources for infrastructure investment
- regional strategies without funding mechanisms

- State run ports of Georgia, S. Carolina, N Carolina provide large incentives and capital dollars to attract and retain tenants/users; Fla. ports receive little support by comparison. Particularly difficult on North Fla. ports.
- Agree with the examples above. Florida needs to be more aggressive in recruiting industry that can locate near ports to further drive international trade, particularly exports.

Northeast and Central Coast Regional Seaports Workshop Comments

- Focus on incentives for location of mfg. and retention of jobs
- Tourism and cruise industry not sufficiently noted- it represents a major economic issue for the state. Importance of the ports to the tourism sector.

B. Tailwinds

1. Statewide Tailwinds (Opportunities aiding Florida's seaports)

Northeast and Central Coast Ports-Online Survey Comments

- All ports need to work together statewide to sustain the economic engine.
- Lack of state funding will hinder development of ports-even most financially successful ports will find it difficult to fund major improvements
- Additional distribution follows growth and directly impacts ports when diversification of goods increases, i.e. Asian carriers.
- Florida's proximity to Latin America and the Caribbean is an asset that very few can match. Florida needs to take advantage of it's geography.

Northeast and Central Coast Regional Seaports Workshop Comments

- Working together vs. competing for the same funds when funding limited.
- Enterprise Florida/Florida Ports Council led a trade mission to South Africa. Several of Florida ports participated- successful effort. Note no mention of Ports on Enterprise Florida web site. Local chambers pick up slack that EF doesn't carry.
- Do Seaports have a corporate structure like the Council of 100- meet as a statewide entity with reps from the ports and users to deal with these issues?

2. Regional Tailwinds (Opportunities aiding Florida's seaports)

Northeast and Central Coast Ports-Online Survey Comments

- Rail impacts some ports but not others-funding solutions should not depend on tortured manipulations to find funding sources.
- FDOT project to create rail switchyard in North Jax. to alleviate trucks crossing city.

C. Headwinds

1. Statewide Headwinds (Challenges potentially hindering Florida's seaports)

Northeast and Central Coast Ports-Online Survey Comments

- Insurance cost is a growing challenge/problem.
- Lack of state funding
- Security requirements of State that conflict with Federal.

- Lack of dredging funding.
- DCA position on port comprehensive plans that causes double work and cost for ports.
- Higher fuel taxes in Florida puts us at a competitive disadvantage.
- Florida's maximum weight limitation on OTR trucks is lower than several states in the southeast, including Georgia.

Northeast and Central Coast Regional Seaports Workshop Comments

- Is there a statewide target marketing/economic development plan for the deepwater seaports? No. Funding for marketing on a statewide basis? To assist both small and large ports in capturing additional business. The strategic visioning plan should address this?
- Enterprise Florida/Florida Ports Council led a trade mission to South Africa. Several of Florida ports participated- successful effort. Note no mention of Ports on Enterprise Florida web site. Local chambers pick up slack that EF doesn't carry.
- Need to attract industry and distribution centers. Not much land on waterside but land inland to attract industry. Diversify economy of Florida and connect to marketing plan.
- Weight limitation on Florida roads (95k)- compared to Georgia (100k) or South Carolina is a disadvantage.
- SIS doesn't yet have hub-to-hub connections- need them. Rural counties don't have SIS facilities but have ability to attract and establish distribution facilities but no access to SIS funding.
- Railroads business model—steamship lines concerns with both a lack of dual access railroad causes issues and the security issues in Florida- different from other states.
- Florida Tax on short sea shipping- tax on intrastate ship modes on the tonnage (like a harbor tax)- small tax. Cuts against getting traffic off roads.
- Federal harbor maintenance tax is also a headwind.
- Right Whale- proposed regulation of a reduction of 10 knots into Jaxport. ½ million a year to readjust. Impacts of \$2 billion over 5 years including coastal tankers? Shipping impacts on the whales? Don't know enough about the problem- might be a small ship issue. Choosing the wrong approach in their rule, there are other approaches.
- Jaxport involved in this very emotional issue for last 10 years. National Marine Fisheries- 0 take limit. Being sued by environmentalists. Stop regulation by going to voluntary systems. Public hearings on the proposed rules taking place next week?
- More whales in last 5 years, don't count calves. Same species in South Africa.

2. Regional Headwinds (Challenges potentially hindering Florida's seaports)

Northeast and Central Coast Ports-Online Survey Comments

- Lack of perception of importance of ports as state assets because of number of ports and geography of state
- Incentives and capital available to Ga., S. Carolina, and N. Carolina ports at the State level that are not available to Fla. ports. Difficult to compete and can't compete on a pure cost basis.
- This one of the most important issues facing all ports in Florida and the rest of the Nation. The public does not recognize the value of the ports and the contributions they make to our

everyday lives. Especially disconcerting is that local governments do not understand the value of ports to their local economy.

VI. Southeast Region Seaports Business and Market Dynamics Shared Needs

A. Overview of the key components for business planning models for each of the regional ports

Mr. Towsley invited each Port Director and their representatives to offer reflections on their business models:

Northeast and Central Coast - Seaports Business Models--Port Canaveral

Governing Body: Canaveral Port Authority (Canaveral Port District)

Description: Located on mid-Florida's Atlantic coast, adjacent to the Kennedy Space Center and to the Orlando theme parks and attractions, Port Canaveral serves both cargo and cruise markets. In FY 03/04, Port Canaveral handled 4.6 million revenue cruise passengers on 1-, 3-, 4-, and 7-day cruises to the Bahamas and the Caribbean. To date, the Port has invested \$150 million in its six major cruise terminals designed and custom-built to accommodate the world's fleet of super megacruise ships. The Port has room for three more terminals including a facility to homeport the America Works City, if it is built. Port Canaveral and its Foreign Trade Zone 136 serve as a unique quadramodal transportation hub, linking sea, land, air and space transportation modes. Primary cargoes – served by ten berths and a feeder-sized container yard – include fresh fruit, steel, lumber, vehicles, petroleum products, newsprint, salt, cement and aggregates. These cargoes totaled 4.1 million tons in FY 03/04. Use of the Port as a distribution center for import cargoes being sent throughout the Southeast U.S. is increasing; this trend will continue to grow. In addition to its maritime operations, Port Canaveral has created a state-of-the-art maritime fire training facility for ships' crews and has developed award-winning environmental programs. Port property is also utilized for public/private, commercial and recreational facilities for access by the local community and tourists to the ocean, beaches and parks.

Director Comments:

- Cruise, cargo and recreation
- Cruise aspect continuing to grow
- Cargo has been languishing. But some activity and cargo is growing.
- Recreational aspect- doesn't contribute much financially- boat ramps, proposal for resort on Port property.
- 50 million revenues this year. But not enough \$\$ expansion or for rehabilitation of cargo piers (40 million next 4 years). Need a new cruise terminal.
- 5 elected commissioners. Haven't collected ad valorem since 1986.

Northeast and Central Coast Regional Seaports Business Models-Port of Fernandina

Governing Body: Ocean Highway and Port Authority, Nassau County

Description: The Port of Fernandina provides terminal service to over fifteen pulp and paper mills located throughout Florida and southeast. Fernandina also supports a number of independent container lines serving Venezuela, Colombia, Ecuador, the Dominican Republic, Haiti, Jamaica, Aruba and Bermuda. The Port's principal cargoes include:
Exports: Forest products such as Kraft linerboard, wood pulp and treated lumber.

Imports: Lumber, wood pulp, hardboard and steel.

The containerized commodities moving through the Port include wood pulp, automobile parts, steel products, beer, frozen foods, machinery and consumer goods.

Director Comments:

- Two business lines-lumber
- Container line- growth in last couple years. Doubling in next 4 years.
- 5 elected officials- no taxing authority. Rebirth in 1986. Generating now some excess cash
- More off port than on port warehousing capacity. Opportunity off port.
- Historical town on one side and a paper mill on the other. Land constrained.

Northeast and Central Coast Regional Seaports Business Models- Port of Fort Pierce

Governing Body: St. Lucie County

Description: St. Lucie County is exploring its strategic options for the Port. The current owner of 77 percent of the property, 67 acres, is entertaining offers to sell 52 of the 67 acres to private developers to construct a mega-yacht complex. No specific plans have been provided on the remaining 15 acres. Once a final plan has been submitted, it must be compliant with the Port Master Plan. The County will offer assistance to the developer of the 52 acres for the mega-yacht facility. The Port master Plan has been completed and approved by State agencies and the County. Private users of the Port – Indian River Terminal Company, Bahama Start Limited, Inc. and other miscellaneous shippers – continue to move bulk products at their facilities.

Principle Activities and Products (private terminals):

Imports: Aragonite, cement.

Exports: Grapefruit

Director comments:

- Mr. Lloyd Bell and working out a solution to the berth use for export /import

Northeast and Central Coast Regional Seaports Business Models--Port of Jacksonville

Governing Body: Jacksonville Port Authority

Description: The Port of Jacksonville includes many private terminals along the St. Johns River, plus three public cargo terminals and one passenger cruise terminal controlled by the Jacksonville Port Authority, also known as JAXPORT. The non-JAXPORT facilities include a cargo terminal owned by Crowley Liner Services, multiple dry and liquid bulk terminals, shipyards, and U.S. Navy and Marine Corps Installations. JAXPORT facilities serve as a southeastern hub for the inter modal movement of commodities on the works market. Well-known as a leading importer of automobiles and other vehicles, the Port also ranks among the top twelve container ports in the nation and dominates trade with Puerto Rico. Jacksonville continues to be an important military outload port for the rapid deployment of supplies for U.S. military operations throughout the world.

Director Comments:

- 7 member board- 2001 separated from airport to become independent authority. 3 appt by Governor, 4 appointed by mayor.
- 3 terminals-
- Need for more property- and work the inter-modal connections- take advantage but not overload the system.
- Jaxport has always been a fantastic inter-modal hub-
- Next 10 years- substantial player in both north/south and east/west trade lanes.

B. Identification and refinement of shared needs and characteristics of the seaport business planning models in the region.

The facilitators invited participants to review and refine draft starter list of shared needs for seaports in the West Coast and Panhandle regions drawn from the responses in an online Ports survey. Below are featured the online survey rankings for the region and the state and the results of a survey completed by participants at the workshop. Also included is a summary of the discussion points of the workshop participants.

**Northeast and Central Coast Regional Seaports
SHARED NEEDS
BASED ON SEAPORT BUSINESS AND MARKET DYNAMICS (DRAFT)**

1. Improved inter- and intra- regional freight mobility and connectivity in transportation corridors. Improved mobility and connectivity are essential to support economic growth and the competitiveness of domestic and international trade as well as passenger movements.

Critically Important Less Important Avg.

	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	5	4	1	0	0	4.4
Northeast and Central Coast Online Response (8-2)	2	0	1	0	0	4.3
NE and Central Coast Wrkshp Survey Responses (8-3)	14	4	0	0	0	4.8

Northeast and Central Coast Ports-Online Survey Comments

- Mobility is one of best advantages Jaxport has when competing with neighboring ports.

Northeast and Central Coast Ports-Workshop Comments

- Jaxport is very focused on this in getting connection between facility and interstate system.
- The entire modal chain needs to be consider
- Challenges in keeping the good intermodal throughput in Jacksonville.
- Rail connection is adequate but needs improvement. Not that rail is part of the SIS.
- Different level rail services available to ports. 100% of truck traffic out of the terminals. Need to work with railroads to build new facility and upgrade their current structure.
- Fixing immediate problem of connectivity to highways. The long term temporary fix is 10 or more years
- Need for hub to hub connections

Northeast and Central Coast Ports-Workshop Survey Written Comments

- Entire chain has to all work, at lowest cost.

2. Improved cargo and passenger throughput. On- port landside cargo and cruise terminal and handling system upgrades are needed to enhance cargo and cruise passenger throughput and increase port capacity.

Critically Important Less Important Avg.

Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	3	7	0	0	0	4.3
Northeast and Central Coast Online Response (8-2)	2	1	0	0	0	4.7
NE and Central Coast Wrkshp Survey Responses (8-3)	7	7	1	1	0	4.3

Northeast and Central Coast Ports-Online Survey Comments

- Jaxport is seeking location for permanent cruise terminal as current location is air draft restricted.
- Cargo handling equipment is 50 gage and must be replaced with 100 gage cranes at some point to remain competitive

Northeast and Central Coast Ports-Workshop Comments

- Land value constraints-costs of land nearby for associated businesses.

Northeast and Central Coast Ports-Workshop Survey Written Comments

- Different operators/trades have different requirements. Throughput may not depend on explosive upgrades!

3. Competitive market assessment and port diversification. Ports are faced with significant challenges in sustaining growth and diversifying their business base and need to explore ways of rationalizing their markets.

Critically Important Less Important Avg.

Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	0	5	5	0	1	3.3
Northeast and Central Coast Online Response (8-2)	0	1	3	0	0	3.2
NE and Central Coast Wrkshp Survey Responses (8-3)	4	8	4	0	0	4.0

Northeast and Central Coast Ports-Online Survey Comments

- Jaxport has a diversified base so this is not as critical except in maintaining the base.
- With international trade increasing, diversification is not the problem, terminal and infrastructure capacity and constraints are.

Northeast and Central Coast Ports-Workshop Comments

- Canaveral's move into tourism/resort. How has this worked? Land values have gone up so much that commercial fleet "in its last days". Ron Jon resort on Banana River- this is a natural extension of the port's heritage. Large port connected to small community.

4. Recognition of the vital role ports play as economic engines in their local communities, regions, the state, and the nation. Ports seek to retain and stimulate economic development and

job growth to fulfill their mission as economic engines of their local communities, regions, the state and the nation

Critically Important Less Important Avg.

Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	8	2	1	0	0	4.6
Northeast and Central Coast Online Response (8-2)	3	1	0	0	0	4.8
NE and Central Coast Wrkshp Survey Responses (8-3)	11	4	1	0	0	4.9

Northeast and Central Coast Ports-Online Survey Comments

- Jacksonville is still abuzz with the Asian carrier announcement.

Northeast and Central Coast Ports-Workshop Comments

- Port Canaveral- economic impact studies results provided to local community, media and other outreach. Most important thing is that they are self sufficient. If started to collect taxes this might not be enough for the public.
- Public outreach and information should be a part of this.
- Ports updating their economic impact studies?
- Jaxport has been successful in outreach in the community through various creative approaches- a centralized port industry job website. Increased awareness of what a large economic engine this is. Only 150 employees of the port.
- Public appreciation is critical- “used to be only time we see you is when you want money.”
- Need to sell the “regional benefits”—shared regionally. E.g. First Coast MPO.
- Important to put our stories- collectively together.

Northeast and Central Coast Ports-Workshop Survey Written Comments

- I don’t think the community knows this. This is one reason for the First Coast MPO Global Trade Conference on October 13. It will include the surrounding communities.
- Ports are not just economic engines. They can be an interesting part of the community, if they are interacting with the community and make an effort to be good neighbors.

5. Waterside navigation improvements. The intermodal “highway” starts with a port’s channel and harbor. Improvements are needed to accommodate the dynamics of shipping market and vessel changes in a timely manner

Critically Important Less Important Avg.

Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	4	4	2	0	0	4.2
Northeast and Central Coast Online Response (8-2)	1	1	1	0	0	4.0
NE and Central Coast Wrkshp Survey Responses (8-3)	10	5	1	0	0	4.6

Northeast and Central Coast Ports-Online Survey Comments

- Jaxport needs 45 to 50 foot channel depth.

Northeast and Central Coast Ports-Workshop Comments

- Georgia and South Carolina are subsidized heavily by states. Jax in 90’s was shallowest ports in the country, restricted trade to Puerto Rico. Done ½ of 41 foot project. Authorized phase 2 but no funding.

- Tradepak Terminal- looking to bring vessels in 45 foot.
 - Accelerated feasibility study for 45 feet. Water depth is critical. “They will vote with their wake”
 - Getting \$\$ for dredging projects from Federal government is extremely difficult. Georgia giving 750 million to port of Savannah and not doing a federal cost share.
 - Haven’t had a collective voice as Florida ports in Washington. Not only on appropriations issues but the speed of the Corps process.
 - Florida has been good to Ports in 96 and 99 funding.
 - Jacksonville is a river port and the dredging required is greater
 - Every Asian and European carrier is saying you need 45-47 feet to come to the Port. “Dredge or Die”
 - How important is this from a statewide standpoint?
 - The Panama Canal will open at 50 feet soon. This will bring more ships potentially
- Northeast and Central Coast Ports-Workshop Survey Written Comments*
- Main population centers may need giant ships more than smaller cities and rural areas.

6. Facilities and services that address the needs of port users. Ports must provide market-sensitive facility and service costs to their users to retain and expand business opportunities

	<i>Critically Important</i>					<i>Less Important Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	6	5	0	0	0	4.5
Northeast and Central Coast Online Response (8-2)	2	2	0	0	0	4.5
NE and Central Coast Wrkshp Survey Responses (8-3)	6	7	3	0	0	4.2

Northeast and Central Coast Ports-Online Survey Comments

- This sounds repetitive but we must compete with neighboring state ports.

Northeast and Central Coast Ports-Workshop Comments

- In SIS, ports are hubs. Doesn’t address on-port funding. Look at definitions on qualifying projects.

Northeast and Central Coast Ports-Workshop Survey Written Comments

- Efficient and cost effective access.

7. Regional cooperation to maximize use of resources. Promoting synergies to benefit public and private sector freight and passenger interests throughout Florida will maximize the benefits of the state’s seaport system.

	<i>Critically Important</i>					<i>Less Important Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	2	6	1	1	0	3.9
Northeast and Central Coast Online Response (8-2)	1	1	0	1	0	3.7
NE and Central Coast Wrkshp Survey Responses (8-3)	5	6	3	1	0	4.0

Northeast and Central Coast Ports-Workshop Comments

- This is a new concept to the network. Fernandina and Jaxport coordinate because of the geographic proximity. Have in common the infrastructure in the region. Cooperation on the infrastructure side.
- On-port you have different customer needs.
- 301 is a regional road- in addition to I95 and I10. Stronger you are collectively- have more political clout together.

8. Public-private partnerships. Encouraging public-private partnerships will help maximize financial resources and collaboration between ports, the state and the private sector

	<i>Critically Important</i>					<i>Less Important Avg.</i>
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	3	5	2	0	1	3.8
Northeast and Central Coast Online Response (8-2)	2	1	1	0	0	4.2
NE and Central Coast Wrkshp Survey Responses (8-3)	8	6	2	0	0	4.4

Northeast and Central Coast Ports-Online Survey Comments

- Bear in mind when the customer comes to the table with his own resources the port gives something up, could be control, revenue, etc. Customer is in business to make a profit and capital is always critical to the private sector.

Northeast and Central Coast Ports-Workshop Comments

- MOL is putting 200 mil of own money into Jaxport. This is a partnership where all will get a return.
- Railroad improvements- and partnerships are part of this.
- Rate of return is important
- Partnerships that don't stop at the ports but beyond for improvements in the inter modal system.
- Often need the partnership to make something happen sooner or at all. Timing is a critical factor in being responsive to private sector needs.
- Public Private partnerships help to ensure these customers are more likely to stay.
- Flexibility of Florida ports- helped customer to achieve goals. Other ports are more rigid about their ability to respond.

Northeast and Central Coast Ports-Workshop Survey Written Comments

- Competitive issue between ports?

9. A safe, secure, sustainable and cost-effective logistics chain as part of an intermodal system for the transport of people and goods. The seaports' strategic objective is to build a truly intermodal transportation system that provides seamless connections while ensuring a safe, secure, sustainable and cost-effective logistics chain for the transport of people and goods

	<i>Critically Important</i>					<i>Less Important Avg.</i>
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	6	3	1	0	0	4.5
Northeast and Central Coast Online Response (8-2)	2	0	1	0	0	4.3

NE and Central Coast Wrkshp Survey Responses (8-3)	9	4	3	1	0	4.2
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Northeast and Central Coast Ports-Online Survey Comments

- Rail providers do not always have same view as ports on moving goods from ports. Often easier for rails to require off port delivery rather than provide stellar service on port.

Northeast and Central Coast Ports-Workshop Comments

- “Timely” – need to add this to the statement. Critical factor.

10. Other shared needs that should be considered:

Northeast and Central Coast

- Security, security, security!!!
- Develop off-port facilities to supplement waterfront activities.

Northeast and Central Coast Ports-Workshop Survey Written Comments

- Essential component of entire transport chain need access to land near ports at costs they can afford.

VII. Review, identification and refinement of guiding principles for a statewide and regional seaport strategic planning process reflecting the demands of the Florida Seaport Business model

The facilitators invited participants to review and refine draft starter list of guiding planning principles for Florida seaports drawn from the responses in an online Ports survey. Below are featured the online survey rankings for the region and the state and the results of a survey completed by participants at the workshop. Also included is a summary of the discussion points of the workshop participants.

**DRAFT GUIDING PRINCIPLES
FOR A STATEWIDE AND REGIONAL SEAPORT STRATEGIC PLANNING
PROCESS THE REFLECTS THE DEMANDS OF THE FLORIDA SEAPORT
BUSINESS MODEL**

Substantive Principles

- 1. In order to strengthen the state’s overall network of seaports that handle varied commodities and serving different trade lanes, the Florida seaport strategic plan should reflect the input of the state’s 14 deepwater seaports and the demands of the Florida seaport business model.**

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	6	5	0	0	0	4.5
Northeast and Central Coast Online Response (8-2)	2	2	0	0	0	4.5
NE and Central Coast Wrkshp Survey Responses (8-3)	9	5	0	1	0	4.5

Northeast and Central Coast Ports-Online Survey Comments

- The reason not given a 5 is it must be recognized not all ports in Fla. are equal in economic value to the community or State. This is hard to say based on theory all are vibrant ports, but that statement is not completely true.

Northeast and Central Coast Ports-Workshop Comments

- E.g. Port Manatee- look at its growth. It is not too late for some of the small ports. You have 4 major ports that play a big role in the overall planning.

Northeast and Central Coast Ports-Workshop Survey Written Comments

- Different ports specialize in different segments of transport—may not have indicated differences.

2. To sustain a Florida seaports competitive international trade network that fosters economic development, constant market vigilance and investment flexibility will be required.

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	7	3	0	0	0	4.7
Northeast and Central Coast Online Response (8-2)	2	1	0	0	0	4.7
NE and Central Coast Wrkshp Survey Responses (8-3)	9	5	1	0	0	4.5

Northeast and Central Coast Ports-Online Survey Comments

- Tell this to FDOT as it attempts to put ports in the "road box" as far as long range planning and investment.

Northeast and Central Coast Ports-Workshop Comments

- Most of the states Florida competes with have 1-2 ports. How can we compete with Georgia when there is a limited amount of revenue from the state? State should evaluate what ports are serious about competing with other states for international trade.
- It is not an issue that we have too many ports. FSTEAD allocation process has been good. The problem is the pot is not big enough. 2 levels of state interest: how do ports compete with out of state; what economic benefits are provided by each of the ports.
- You need the political clout from the 14 areas and their representatives.

3. The Florida seaports must find an appropriate balance between commerce, global competition, mobility and security.

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	6	3	1	0	0	4.4
Northeast and Central Coast Online Response (8-2)	3	0	1	0	0	4.2
NE and Central Coast Wrkshp Survey Responses (8-3)	5	10	0	0	0	4.3

Northeast and Central Coast Ports-Workshop Comments

- Balancing between first 3 elements and security. Historically focused on first three.
- Florida is doing a better job at security than many other ports in the country. To remain competitive you have to think about the costs involved.

4. The Florida seaports must find and build into the strategic plan the appropriate balance between mobility and the impacts on the environment and community.

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	6	3	1	0	0	4.7
Northeast and Central Coast Online Response (8-2)	3	0	1	0	0	5.0
NE and Central Coast Wrkshp Survey Responses (8-3)	7	4	3	0	0	4.3

Northeast and Central Coast Ports-Workshop Comments

- It is critical to have support of your host community. Smaller the port the more important.
- Is this more a local issue. Should this be part of a strategic statewide plan?
- This will need more clarity.
- Community needs to help protect ports from encroachment of other uses. Has to be commercial property left on the books for expansion. This is limited critical resources.
- This is a state issue and may need state policies.

Northeast and Central Coast Ports-Workshop Survey Written Comments

- Should focus on industrial land preservation.

Planning Process Principles

- 1. The development of the seaport strategic plan should be a collaborative effort directly involving and engaging the state's 14 deep water ports and all levels of government (federal, state, regional and local), private sector users and owners of Florida's trade and transport system, and all modes of transportation (seaports, railroads, airports, highways, transit, trucking and space).**

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	5	3	2	0	1	4.0
Northeast and Central Coast Online Response (8-2)	1	2	0	0	1	3.5
NE and Central Coast Wrkshp Survey Responses (8-3)	6	7	1	0	0	4.4

Northeast and Central Coast Ports-Online Survey Comments

- Not all 14 are created equal.

Northeast and Central Coast Ports-Workshop Comments

- This is what the workshop has done.
- Will this narrow as the process moves closer to the decision on the plan.
- If you focus on cruise and cargo.

Northeast and Central Coast Ports-Workshop Survey Written Comments

- Need to be careful to develop a process that allows for consensus.
 - Entire process/steps must work.
- 2. The Seaports and their partners should engage in a process to build understanding and consensus on the needs, policies and strategies to ensure Florida’s competitiveness in the global market.**

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	4	4	1	0	1	4.0
Northeast and Central Coast Online Response (8-2)	0	1	1	0	1	2.7
NE and Central Coast Wrkshp Survey Responses (8-3)	5	5	5	0	0	4.0

Northeast and Central Coast Ports-Online Survey Comments

- Jaxport "partners" are our tenants in general and I'm not sure they all care as much as we do. They can move if the grass is greener across the state line.

Northeast and Central Coast Ports-Workshop Survey Written Comments

- Consensus will be important

Northeast and Central Coast Ports-Workshop Comments

DOT

- Conditions report in June- background and data for each of the ports. What’s going on today and what are you planning to do.
- Economic report- research study- addressed the gap on macro economic study return on investments for air and seaports. Also looked at freight movement and planning.
- The hope is that the Ports effort will dovetail with the statewide DOT effort to create a strategic ports plan.
- Separate infrastructure bank for ports? Now competing with all other modes. Consider this in a strategic plan.

VII. Review, identification and refinement of guiding principles for a statewide and regional seaport strategic planning process reflecting the demands of the Florida Seaport Business model

The facilitators invited participants to review and refine draft starter list of guiding planning principles for Florida seaports drawn from the responses in an online Ports survey. Below are featured the online survey rankings for the region and the state and the results of a survey completed by participants at the workshop. Also included is a summary of the discussion points of the workshop participants.

VIII. Next Steps

Mr. Towsley thanked the participants for their participation and input. He suggested that their involvement spoke of their commitment and interest in contributing to this important statewide

effort. He reminded them of the sequence of regional workshops and the August 30-31 Seaports Summit taking place in Tampa. The facilitators noted the participants would be notified when the Workshop summary is posted on the Ports Council website. The meeting adjourned at 2:00 p.m.

Appendix #1 Workshop Agenda
Northeast and Central Coast Regional Seaports Workshop
Seaport Statewide Strategic Visioning and Planning Process
August 3, 2006, at Port of Jacksonville, 10:00-3:00 PM

“If you do not know to which port you are sailing, no wind is a good one.” - Seneca
“I skate to where the puck will be, not to where it’s been.” - W. Gretsky
“The future ain’t what it used to be. -Y Berra

Draft Workshop Objectives

- To review the proposed Seaports Business Model Action Planning Process
- To review the context for statewide and regional seaport planning
- To review state and regional partnership roles and responsibilities
- To identify regional trends, headwinds and tailwinds
- To review the key components, shared needs and characteristics of regional and statewide seaport business planning models
- To identify and refine draft guiding principles for a statewide and regional seaport strategic planning process reflecting the demands of the Florida Seaport Business model

Proposed Workshop Agenda

- 10:00 Welcome, Introductions/Participant Profile and Meeting Guidelines**
- 10:15 Overview of the Proposed Seaports Business Model Action Planning Process and Framework**
- 10:30 Context for Statewide and Regional Seaport Planning**
- 10:45 Partnership Roles and Responsibilities**
- 11:00 Identification, review and discussion of regional trends, headwinds and tailwinds**
■ Review and refine draft starter list.
- 11:30 Overview of the key components for business planning models for each of the regional ports: Port Canaveral, Port of Fernandina, Port of Ft. Pierce, Port of Jacksonville**
- 12:15 Lunch (on site)**
- 1:30 Identification and refinement of shared needs and characteristics of the seaport business planning models in the region.**
■ Review and refine draft starter list.
- 2:00 Review, identification and refinement of guiding principles for a statewide and regional seaport strategic planning process reflecting the demands of the Florida Seaport Business model**
■ Review and refine draft starter list.
- 2:50 Next Steps, Key Issues and Strategies Survey and Meeting Evaluation**
- 3:00 Adjourn**

Overview of the Proposed Statewide and Regional Seaports Business Model Action Planning Process and Framework

The 14 public seaports share a common public purpose and create Florida's dynamic seaport system.

Collective mission of Florida's 14 Public Seaports

“The collective mission of Florida's seaports is to enhance the economic vitality and quality of life in the state of Florida by fostering the growth of domestic and foreign waterborne commerce. Each of the seaports furthers this statewide mission at the regional level by providing facilities and services that both expand the economic opportunities available to the local community for trade and tourism and enable the seaport to compete effectively in global markets.” – Chapter 311 F.S.

- ***To create an umbrella strategic Florida seaports plan through collaboration with transportation partners that responds to and reflects the demands of the Florida Seaport Business model***

Reports:

- Florida Department of Transportation Draft Final Report, “Florida's Seaports: Conditions, Competitiveness and Statewide Policies” prepared by Cambridge Systematics, Inc. (dated May 19, 2006).
- Florida Department of Transportation Final Report, “Evaluate Florida's 14 Deepwater Seaports' Economic Performance and the Return on Investment of State Funds”, prepared by Cambridge Systematics with RS&H, Inc., (July, 2006), <http://www.flaports.org/docs/seaportconditionsdraftreport052306.pdf>

Workshops/Summit/ Meetings

- Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey <http://consensus.fsu.edu/ports-survey/index.html>
- Regional Seaports Workshops- July-August, 2006-- Business Model Action Planning, Guiding Principles and Key Issues
- Statewide Seaports Strategic Planning Summit, August 30-31, 2006 - Building agreement on a proposed strategic planning framework, vision of success, guiding principles and assumptions, and key issues and business strategies for statewide and regional seaports challenges and opportunities.
- Presentation of Summit results and recommendations to the Florida Transportation Commission and the Florida Maritime Leadership Conference in September.

Appendix #2 Workshop Evaluation Summary
Northeast and Central Coast Regional Seaports Workshop
Seaport Statewide Strategic Visioning and Planning Process
August 3, 2006, Port of Jacksonville, 10- 3 PM

	<u>Agree</u> ☺		☹		<u>Disagree</u> ☹	
			<i>CIRCLE ONE</i>			
WERE THE WORKSHOP OBJECTIVES MET?	5	4	3	2	1	=Avg.
• To review the proposed Seaports Business Model Action Planning Process	3	9	2	1	0	=3.93
• To review the context for statewide and regional seaport planning	4	8	3	0	0	=4.07
• To review state and regional partnership roles and responsibilities	3	6	6	0	0	=3.80
• To identify regional trends, headwinds and tailwinds	7	7	1	0	0	=4.40
• To review the key components, shared needs and characteristics of regional and statewide seaport business planning models	5	8	2	0	0	=4.20
• To identify and refine draft guiding principles for a statewide and regional seaport strategic planning process reflecting the demands of the Florida Seaport Business model	4	7	4	0	0	=4.00

WORKSHOP ORGANIZATION

◆ Background and agenda packet were helpful	6	5	3	1	0	=4.07
◆ Plenary discussion format was effective	5	5	5	0	0	=4.00
◆ Facilitators guided participant efforts effectively	6	7	2	0	0	=4.27
◆ Participation was balanced	6	7	2	0	0	=4.27

What Did You Like Best About the Workshop?

- Moved quickly but good input
- It was interesting to learn about other ports
- Learned a lot about ports in general and how they relate to the overall regional goals of our area
- I learned a lot!

What Could be Improved?

- Need to meet as a total group, all fourteen deepwater ports together to draft a comprehensive plan
- The format was ok, but did not encourage discussion
- A night time cocktail reception

Other Comments (continue on back if needed)

- I think the format encouraged comment. I am not convinced that it will lead to action items even though some very good suggestions were made. I am concerned that ports don't see off-port impacts.
- Would have preferred more before meeting

Appendix #3 List of Workshop Participants

Northeast and Central Coast Regional Seaports Workshop Seaport Statewide Strategic Visioning and Planning Process August 3, 2006, Port of Jacksonville, 10- 3 PM

<u>Participant</u>	<u>Organization</u>
Lorenzo Alexander	FDOT Seaports Office
Doug Anderson	Port of Ft. Pierce
Charles Baldwin	District 2 Secretary, FDOT
Phil Bates	Sea Star Line
Denise Bunewith	First Coast MPO
Jon Brazee	Canaveral Port Authority
Rick Ferrin	Jaxport
Robert Giangrisostomi	Port Canaveral
David Kaufman	Jaxport
Chris Kauffmann	Jaxport
Dennis Kelly	TraPac, Inc.
Margo Moehring	Jacksonville Planning and Development
Randy McMaster	ICS Logistics
John Mullins	Coastal Maritime Stevedores
Stan Payne	Canaveral Port Authority
Jeff Sheffield	First Coast MPO
Roy Schleicher	Jaxport
Val Schwec	Port of Fernandina
David Stubbs	Jaxport
Michael Williamson	Cambridge Systematics
Phil Worth	District 2, FDOT

Process and Facilitation Team:

Chuck Towsley	Maritime Directions
Bob Jones	Florida Conflict Resolution Consortium
Hal Beardall	Florida Conflict Resolution Consortium

Appendix #4 Planning Assumptions- Workshop and Online Survey Responses

(Drawn from the Florida Seaports 5-Year Mission Plan for 2005-10)

A. Florida seaports provide major transportation benefits allow goods to be delivered close to populations they serve reducing overall truck vehicle miles associated with freight movements.

	Strongly Agree			Disagree		Avg.
Florida Seaports Statewide Strategic Visioning and Planning Panel Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	4	3	1	2	0	3.9
Northeast and Central Coast Online Response (8-2)	4	0	0	0	0	5.0
NE and Central Coast Wrkshp Survey Responses (8-3)	10	3	1	1	0	4.5

Northeast and Central Coast Ports-Online Survey Comments- none

B. Florida seaports reduce logistics costs and offer more consumer choices and lower purchase prices by providing efficient market access.

	Strongly Agree			Disagree		Avg.
Florida Seaports Statewide Strategic Visioning and Planning Panel Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	2	3	3	1	0	3.7
Northeast and Central Coast Online Response (8-2)	0	0	2	1	0	2.7
NE and Central Coast Wrkshp Survey Responses (8-3)	6	5	3	1	0	4.1

Northeast and Central Coast Ports-Online Survey Comments

- If this statement is true why is gas next to a port facility where it arrived and is stored the same price or higher than inland locations?

•

Northeast and Central Coast Ports-Workshop Survey Written Comments

- This may be time overall, nationally but transportation costs that are passed on to consumers is often averaged out so as to not provide local advantages.

•

C. Each of Florida's seaports is vital to the state's overall maritime system participating in a network of seaports handling varied commodities and serving different trade lanes.

	Strongly Agree			Disagree		Avg.
Florida Seaports Statewide Strategic Visioning and Planning Panel Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	4	3	2	1	0	4.0
Northeast and Central Coast Online Response (8-2)	0	1	1	1	0	3.0
NE and Central Coast Wrkshp Survey Responses (8-3)	10	4	1	2	0	4.3

Northeast and Central Coast Ports-Online Survey Comments-none

Northeast and Central Coast Ports-Workshop Survey Written Comments

- Each port plays an important role

D. Each of Florida's seaports provide vital economic and transportation contributions to their host communities.

	Strongly Agree			Disagree		Avg.
Florida Seaports Statewide Strategic Visioning and Planning Panel Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	6	2	2	1	0	4.2

Northeast and Central Coast Online Response (8-2)	1	1	1	1	0	3.5
NE and Central Coast Wrkshp Survey Responses (8-3)	9	5	0	1	0	4.4

Northeast and Central Coast Ports-Online Survey Comments

- Not all 14 ports are active.

Northeast and Central Coast Ports-Workshop Survey Written Comments

- Communities can be more regional or local depending on the port.

E. Florida role as gateway to Latin America has provided two-way trade, transportation and jobs for the economies of Florida and its trading partners.

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
Florida Seaports Statewide Strategic Visioning and Planning Panel Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	5	4	0	1	0	4.3
Northeast and Central Coast Online Response (8-2)	0	2	0	1	0	3.3
NE and Central Coast Wrkshp Survey Responses (8-3)	9	5	0	1	0	4.5

Northeast and Central Coast Ports-Online Survey Comments

- Not all 14 ports are active.

F. Florida serves as the nation’s “third border” carrying goods between markets throughout the U.S. and the rest of the world over the state’s “Atlantic Commerce Corridor and over the state’s other established trade corridors.

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
Florida Seaports Statewide Strategic Visioning and Planning Panel Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	4	4	1	0	1	4.0
Northeast and Central Coast Online Response (8-2)	0	1	1	0	1	2.7
NE and Central Coast Wrkshp Survey Responses (8-3)	10	4	0	1	0	4.5

Northeast and Central Coast Ports-Online Survey Comments

G. Sustaining Florida seaports competitive international trade network that fosters economic development is a moving target requiring constant market vigilance and investment flexibility.

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
Florida Seaports Statewide Strategic Visioning and Planning Panel Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	7	3	0	0	0	4.7
Northeast and Central Coast Online Response (8-2)	2	1	0	0	0	4.7
NE and Central Coast Wrkshp Survey Responses (8-3)	5	8	0	0	0	4.4

Northeast and Central Coast Ports-Online Survey Comments

- Again, tell this to FDOT.

West Coast and Panhandle Ports-Online Survey Comments

- Out-of-state and off-shore seaports are always looking to capture trade routes and liner service that could flow to Florida's major container ports. For the bulk ports as well, changing markets and new customer demands dictate vigilance and flexibility.

Southeast Ports-Online Survey Comments

Comments:

H. Florida seaports collectively have in-house resources to fund only between 23-25% of their \$2.6 billion capital planning needs. (Five Year Capital Needs Plan.).

Strongly Agree *Disagree* *Avg.*

Florida Seaports Statewide Strategic Visioning and Planning Panel Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	7	2	0	1	0	4.5
Northeast and Central Coast Online Response (8-2)	4	0	0	0	0	5.0
NE and Central Coast Wrkshp Survey Responses (8-3)	5	3	2	0	0	4.3

Northeast and Central Coast Ports-Online Survey Comments

Comments:

- I. Florida seaports' financial capacity has been affected by: the continuing and rising cost of capital improvements; the recent diversion of revenues to pay for enhanced security since 9/11; the increasing annual operating costs; and the changes in the national and world economies.**

		<i>Strongly Agree</i>		<i>Disagree</i>	<i>Avg.</i>	
Florida Seaports Statewide Strategic Visioning and Planning Panel Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	8	2	1	0	0	4.6
Northeast and Central Coast Online Response (8-2)	4	0	0	0	0	5.0
NE and Central Coast Wrkshp Survey Responses (8-3)	10	2	1	0	0	4.7

Northeast and Central Coast Ports-Online Survey Comments

Northeast and Central Coast Ports-Workshop Survey Written Comments

- a. Cost are ultimately passed on to customers which may impact competitiveness with other ports and countries.
b.

- J. Florida seaports have experienced a shift from commerce-related infrastructure investment to non-revenue-producing security requirements adversely affecting the seaports' ability to fund their development programs and build additional capacity needed to capture the anticipated expansion of international and domestic trade as well as cruise activities.**

		<i>Strongly Agree</i>		<i>Disagree</i>	<i>Avg.</i>	
Florida Seaports Statewide Strategic Visioning and Planning Panel Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	7	3	1	0	0	4.5
Northeast and Central Coast Online Response (8-2)	2	1	1	0	0	4.2
NE and Central Coast Wrkshp Survey Responses (8-3)	6	5	1	0	0	4.4

Northeast and Central Coast Ports-Online Survey Comments

- Increase in cost through legislation without reimbursement has greatly reduced ability of ports to raise capital particularly through borrowing/bond market, etc.

Northeast and Central Coast Ports-Workshop Survey Written Comments

Port security in Florida is more stringent than West Coast, Northeast or Gulf ports. Good but costs more!

Appendix #5- Facilitation Team



Charles A. Towsley, P.P.M.

Charles Towsley is President of Maritime Directions Inc.- A comprehensive approach to maritime consulting with some thirty years experience in the port/maritime industry. Outlined below is a description of the breadth of professional knowledge and experience he brings to assist you in solving problems, developing plans and strategies, to assist your project needs.

Mr Towsley most recently was the Port Director of the Dante B. Fascell Port of Miami-Dade having been appointed to that position in January 1998. In his position, he was responsible for directing the management and administration of all the day-to-day port operations, strategic planning, and development at the port. The annual port revenues in 2005 were \$85 million. The port's capital improvement plan currently underway includes approximately \$250 million in cruise and cargo projects. The seaport homeports 18 mega class vessels for the world's leading cruise operators. In 2003 the Port of Miami was the first port in Florida to exceed the one million TEU mark and has continues to exceed this number annually. The seaport's performance under the leadership of Mr. Towsley has continued to demonstrate a commitment to good government combined with sound financial business practices. He is knowledgeable and experienced with the federal maritime system and has regularly traveled to Washington to meet with congressmen, senators and federal administrators on maritime issues. Towsley has also testified before federal committees on these matters.

Prior to Towsley's appointment to the Port of Miami-Dade, he was the Managing Director for the Tampa Port Authority, Fl. from 1996-1998. During his tenure at the Tampa Port Authority, Towsley's duties included the port administration, management, policy, strategic planning, bond financing, negotiating and port usage agreements

Prior to Tampa, Towsley served as Manager of Development for the Hamilton Harbour Commissioners at the Port of Hamilton, Ontario, Canada, where he was responsible for economic development, marketing of real estate, lease administration and negotiations.

Prior to entering public port administration full-time, Towsley was a partner and Vice President of Planning for Planistics Group, a private development planning and engineering consulting firm specializing in commercial, industrial and marine port projects. In his position he was responsible for project management, client presentations, corporate administration and management.

Mr. Towsley has a Bachelor of Science degree from Northeastern Illinois University and a Master of Science degree from the University of Michigan. He has received numerous professional awards and held membership on various boards and organizations through the years. He also holds a Professional Port Manager (PPM) designation from The American Association of Port Authorities.



"The purpose of the Consortium is to serve as a neutral resource to assist citizens and public and private interests in Florida to seek cost-effective solutions to public disputes and problems through the use of alternative dispute resolution and consensus building." --F.S. Public Postsecondary Education §1004.59

The Consortium based at Florida State University in Tallahassee and University of Central Florida in Orlando, provides dispute resolution and consensus building service, education, training and research to build a broader understanding of the value of collaborative approaches and create a cadre of citizens, leaders, professionals and students skilled in using collaborative consensus building and conflict resolution processes. The Consortium offers neutral technical assistance to a wide range of professionals, agency staff and private citizens and organizations engaged in public problems throughout Florida. We help to design and implement efforts for intergovernmental collaboration, community and public problem-solving, and land-use and environmental dispute resolution. We also provide referral services connecting stakeholders and potential users with trained dispute resolution professionals.

Robert M. Jones has served as the Director of the Florida Conflict Resolution Consortium, based at Florida State University, since 1990. He works with representatives from state, local and federal government, the private sector and citizen and community groups in Florida to design and implement collaborative consensus building and dispute resolution approaches to public issues. He has served as a public policy facilitator in over 175 projects including 50 statewide policy forums in Florida including more than a dozen focused on statewide and regional transportation issues. He has also mediated land-use, development and environmental disputes. As a trainer in negotiation and mediation skills, he has conducted workshops for state and local government staff and elected officials and has taught graduate level course on dispute resolution for planners. Prior to his work with the Consortium, Mr. Jones was a Senior Associate for eight years at the National Institute for Dispute Resolution, in Washington D.C., where he directed a national dispute resolution research grants program and administered programs in public policy mediation and professional education.

Currently he serves as a member of the national board of the Policy Consensus Initiative (PCI), as co-chair of the American Bar Association's Resolution of Public Disputes Committee, and on the Policy Consensus Professionals Advisory Committee of the United States Consensus Council. He is a member of the California Bar, the American Bar Association, the Association of Conflict Resolution and has served as a mediator and facilitator in community and neighborhood and as a mediator and arbitrator in employment, commercial and labor disputes. He is a graduate of the

University of California, Davis School of Law and of the University of California, Berkeley and of Leadership Florida.

Harald (Hal) M. Beardall serves as a project director for the Consortium's transportation initiative. In that capacity he has designed and facilitated numerous large and small scale processes to build consensus around public policy issues in transportation, as well as designed and facilitated strategic planning efforts with other public entities. Projects he has worked on include the 2020 and 2025 Florida Transportation Plan Updates, the Strategic Intermodal System Steering Committee, the Statewide Intermodal Transportation Advisory Council and creation of the MPOAC Institute.

Prior to joining the Consortium in 1998, Hal served as an advocate and director of several community based non-profit organizations for twelve years. He is a current member of the Florida Bar and the Association for Conflict Resolution-Environmental/Public Policy sector. He holds a JD from the University of Florida and a Master of Science in Planning from Florida State University.