

Seaport Statewide Strategic Visioning and Planning Process

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Southeast Coast Users & Tenants Regional Seaports Workshop August 15, 2006, Port Everglades, Florida, 1:00-3:30 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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**Southeast Coast Users & Tenants Regional Seaports Workshop
Seaport Statewide Strategic Visioning and Planning Process
August 4, 2006, in Tampa, Florida, 1:00-3:30 PM**

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Facilitator’s Workshop Summary

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EXECUTIVE SUMMARY

Director Phillip Allen, welcomed the participants to Port Everglades, which hosted the workshop, and noted that this special meeting with port users and tenants was requested by regional port directors at an early workshop in July to ensure the perspective of users and tenants was included in the planning process. Charles A. Towsley, PPM, Maritime Directions Inc., welcomed the participants on behalf of the Florida Ports Council and the Ports Directors and 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 “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 leading to a statewide summit on August 30-31, in Tampa.

Mr. Towsley then introduced the meeting co-facilitator, Hal Beardall from the Florida Conflict Resolution Consortium, based 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 quickly reviewed 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. He also reviewed the range of partners and their roles in planning for Florida’s seaports and their role in state, regional and local economies.

Workshop participants reviewed and refined a draft starter list of trends, headwinds (challenges) and tailwinds (opportunities). Global and national trends identified included anticipated expansion of the Panama Canal, possible changes in Cuba, rapidly increasing trade volumes and changes in the security environment. Statewide and regional trends included the designation of the Atlantic Trade Corridor, the need to maintain and promote ports as regional economic engines and the importance of the public and private sectors working together.

Opportunities for Seaports statewide and regionally that participants identified included: the need to educate others on the importance of ports to the regions economy, preclearance of cargo at overseas ports, increasing size of ships and interaction with local economic development organizations.

Challenges for seaports statewide and regionally that participants identified included: permit timing and funding for dredging to accommodate larger ships; impact on traditional trading partners if they are not included in the limited number of certified ports for preclearance of cargo; lack of railroad options and connectivity to other hubs.

Participants then reviewed and refined a set of **shared strategic issues based on the seaport business planning models** in the region including:

1. Improve inter- and intra-regional freight and passenger mobility connectivity in transportation corridors.
2. Ports are committed to the development, protection and preservation of permanent industrial land sites that enable port and industrial user to deal with business growth and limit residential uses that are not consistent with the port's needs.
3. 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.
4. 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.
5. 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
6. Support waterside navigation improvement that can accommodate dynamics of shipping market vessel changes in a timely manner.
7. Address port user needs. Provide market sensitive facility and service costs to port users to retain and expand business opportunities
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
9. Encourage public-private partnerships that maximize financial resources and collaboration between ports, the state and the private sector industry, local government and communities.
10. 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

Mr. Towsley thanked the participants for their participation and input and Port Everglades for hosting the meeting. He reminded them of the late August Summit and encouraged them to let other users and partners know of the opportunity to participate. The facilitators noted the participants would be notified when the workshop summary is posted on the Ports Council website.

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Facilitator’s Workshop Summary

I. Welcome, Introductions and Review of Agenda

Director Phillip Allen welcomed the participants to Port Everglades, which hosted the workshop, and noted that regional port directors at an early workshop at the Port of Miami requested this special meeting with port users and tenants on July 14. All of the regional port directors wanted to ensure that the perspective of users and tenants was included in seaports visioning and planning process.

Charles A. Towsley, PPM, Maritime Directions Inc., welcomed the participants on behalf of the Florida Ports Council and the Ports Directors and 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 have been a series of workshops concluding today with users and tenants in Ft. Lauderdale leading to a statewide summit on August 30-31, in Tampa.

Mr. Towsley then introduced the meeting co-facilitator, Hal Beardall from the Florida Conflict Resolution Consortium (FCRC), 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 # 2 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 the following 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:

- A. Seaport Master Plans (9J5)
- B. Five Year Plan to Achieve the Mission of Florida’s Seaports. Sets forth strategic actionable 5 year statewide seaport objectives.
- C. MPO Long Range and Short Range Transportation Plans
- D. Local Government Comprehensive Plans
- E. Strategic Regional Policy Plans (transportation and land use elements)
- F. Florida 2025 Transportation Plan
- G. Strategic Intermodal System Plan
 - Seaport Connectors: Port of Tampa – cross town expressway to 20th ST. to Maritime Blvd. and entrance, cross town expressway to 20th St. to Causeway Blvd (US41) to Port Sutton Rd and Pendola point Rd to entrance, I-75 to Big Bend Rd to US 411 to Pembroke Rd to entrance; Port Manatee – I-275 to US 41 to Piney Point Rd to entrance; Port of Pensacola – I-110 to chase Street to Bayfront Parkway to Barracks St. entrance, exit from Barracks Street to 9th Ave. to Gregory St. to I-110; Port Panama City – SR 77 to SR 390 to SR 368 (23 street) to US 98 to Avenue D to entrance
- H. Regional Efforts
- I. FDOT District Work Plans

- J. South Florida Regional Transportation Authority
- K. Airport Master/Strategic Plans

Mr. Towsley briefly reviewed the following range of partners and their roles in planning for Florida's seaports and their role in state, regional and local economies:

- 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 Transportation Commission
- Metropolitan Planning Organizations
- Regional Planning Councils
- Florida Seaport Tenant/User Stakeholders.
- The Florida Department of Transportation-Headquarters- Inter-modal Division and Planning District Offices
- Florida Ocean Alliance
- Local Government

IV. 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

Southeast Coast Ports- Online Survey Responses

- Increase in trade with Far East
- Impact of DR CAFTA & FTAA
- Impact of a Free Cuba
- Port Access
- Larger Vessels, increase in capacity and container volumes
- Better road access
- Separate trucks from cars
- Reduced funding for seaport work by COE for harbor maintenance and expansion.
- Lack of spending of Harbor Maintenance Trust Funding.
- Environmental limitations on growth of Ports.
- Limited funding for Federal transportation for linkages (road & rail))
- Increased costs for additional state mandated security (sec. 311.12) over and above Federal security requirements (MTSA) making Florida ports less competitive over other states.
- Diversion of state funds normally utilized for port infrastructure improvements going towards defraying security related expenses being incurred by Florida Ports.
- Cost of security

- Berth & land area limitations
- Draft limitations
- Transportation linkage limitations and growing congestion.
- Funding limitations with escalating costs.
- Environmental restrictions.
- Political congestion.
- Hurricanes.

August 15, Tenants and Users Workshop Comments:

- Rapid increase in trade – consequence of impact on ports and moving goods through - monies taken in don't match the expenditures
- Increased security – changes in the security environment
- What is coming in from the sea can come in at high speed, underwater, lots of ways to move weapons on the oceans
- Potential changes with Panama Canal?
- Potential changes in Cuba?
- Special meeting for the issue of Cuba? Deserves time and thinking about how we respond, particularly South Florida. Cruise industry opportunities for example
- 20 years ago tried to develop an intermodal connection with the RR and the RR did not follow up – we need intermodal
- Need to pause and look back when this region was just a sleepy, tourist area. Then we created seamless transportation services that are innovative, quicker, and we had an edge. But now we are losing this edge due to congestion and security. We need to look at these issues differently so they don't impede movement. We need to create more jobs by making sure this regional engine works effectively and efficiently. The ports and private sector need to work together to overcome these barriers, can't afford to lose that competitive edge
- Protect who we are; who we have become – global market presents competition challenges – ports and private sector business models need to work together – must know what it takes to move people and goods efficiently – work to speak with one voice at the local, state and federal level – our message is not being well received – Atlantic trade corridor as an example – only one corridor recognized at level of national significance
- Recognition of the Atlantic trade corridor is a good first step – next step is to make it work
- What happens to regional carriers if Panama opens up global carriers

B. Tailwinds (Opportunities aiding Florida's seaports)

Southeast Coast Ports- Online Survey Responses

- Florida's number one Industry is International Trade/Commerce. The state has an import/export culture, yet not very well recognized by its citizens who should be very supportive.

- Must take advantage of the states SIS which is more than a step ahead of other states. This is an excellent program to gain additional funding for major improvements to transportation corridors of vital importance to seaports and consequently international trade.
- FL ports need to continue distinct funding mode via FSTED for Ports.
- FDOT needs to continue & expand funding for port linkages to transportation net.
- FDEP needs to recognize need for ports to keep up with FL growth and provide rapid permit response.
- FL legislature needs to support port ability to exist in the urban setting and facilitate ability to grow.
- Implementation of SIS (corridors of commercial significance) for federal/state funding.
- Opportunities for inland port development.
- Opportunities through FDOT for SIS and State Construction Program funding for connector improvements.
- State opportunities to improve rail infrastructure and coordinated improvement to FEC and CSX.

August 15, Tenants and Users Workshop Comments:

- Need to focus on what is coming in from the water, not just the land – need to strike a balance, efficient use of limited resources to address the real threats
- Port certification – extending the borders through preclearance of cargo
- Any benefits to those ports using the preclearance? It is not clear yet, but may play a factor, potential benefit
- First port that gets to 50' will have a big advantage
- Already had ship of 6200 in Port Everglades – more coming through Suez canal – coming next year, not waiting for the Panama canal expansion – have no place to put those vessels
- How do we get federal govt. to focus on north/south movement – important to Fla. Seaports
- How do ports interact with economic development organizations? Beacon Council and others interested in keeping and creating jobs?
- Need to be able to tell our story to legislative leaders (local, state and federal). Dollars are being spent but perhaps not efficiently. Need to inform them on the jobs and wages ports provide and benefit to state economy.
- Second report by Cambridge addresses some of these issues –
- Short sea shipping – fuel costs may make it more attractive – trucks going and coming empty
- We are looking at enhancing the service model: better, faster, cheaper, and more secure. Some of our public partners are not in the trading business. The upcoming change in state government in January may be an opportunity to educate. The state of Florida has been an excellent partner and has put up money. Going forward we want to be sure funds are directed at developing efficiency not just a better highway model. We need to focus on where we need to stand in five years in order to work with the state

- Makes sense, but need to tell our story – have to sell it to your government partners and to the public (ports are dirty, etc.)

C, Headwinds (Challenges potentially hindering Florida’s seaports)

Southeast Coast Ports- Online Survey Responses

- 311.12 which mandates an additional (duplicity) and unnecessary extra level of security over and above the federal standards mandated by the US Congress under the MTSA adding additional costs to cargo and cruise operators, resulting in an uncompetitive disadvantage over other competing states.
- Unfunded security costs and lack of common sense on behalf of FDLE
- FDEP complexity growing and speed reducing.
- FSTED funding for ports being mixed by FDOT with non-port issues.
- Security costs in FL higher than competing states.
- Security operations & costs in some ports out of scale with port revenues - cost & time delays could scare away business.
- Extremely poor access to and from the Port of Miami.
- Lack of understanding by private and public sector of importance of international trade to the region.
- Pressure on MPO's to support urban growth and development limits ability to support port growth and maintenance of access corridors.
- Growth of surrounding communities restraining ports abilities to maintain access and grow to meet growing cargo volumes.

August 15, Tenants and Users Workshop Comments:

- Federal partners – their funding doesn’t support or keep pace in the growth of cargo –lack of response from Federal to support growth and opportunities in expanding trade (e.g. dredging) – Free trade pacts create opportunities and need support to seize those opportunities.
- Changes at Panama Canal brings challenges – need to handle bigger ships – we are in a strategic location and need deeper water, one of our biggest challenges
- Federal concerns with coverage of CSI (port certification). If the certification is being capped at 50 or 52 causes concerns. With heightened security level there is a definite benefit to those with certification. Our traditional partners may not get the certification if it is capped and will be left at a competitive disadvantaged.
- If inspectors are allocated by tonnage that may cause a crunch too
- Each port interacting with its local efforts – not fully exercised the regional opportunities
- State lacks railroads – especially in interaction with ports here in Florida – other states do a better job of discharge onto rail to ship across country – limited north/south movement – other east coast ports are creating opportunity – industry needs to develop – e.g. studies of Biscayne Blvd.
- Connectivity between hubs?
- Disconnect in timing between private sector and public sector planning
- There is a state tax that dissuades using short sea shipping

- We had to fight the state of Florida to get the Atlantic trade corridor designation
 - state was worried about possible diversion of transportation funds

V. Southeast Region Seaports Business and Market Dynamics

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

Mr. Towsley called participants attention to the one-page summaries for each ports business model offered in the agenda packet. He noted that at previous workshops each Port Director offered their reflections on their business models. In order to make the best use of the participants time and perspectives he suggested that discussion today focus on the shared strategic issues identified from the ports' business models.

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

The facilitators invited participants to review and refine draft starter list of shared strategic issues based on seaport business models in the Southeast Coast region and statewide 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 comments offered during the workshop by participants.

WEST COAST AND PANHANDLE REGION 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.

	<i>Critically Important</i>					<i>Less Important</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 Survey Responses (8/14)	29	9	2	0	0		4.7
Southeast Survey Responses (8/14)	7	5	0	0	0		4.6
Southeast Users 8/15 Survey Written Responses	13	4	0	0	0		4.8

Southeast Ports-Online Survey Comments

- This is the most important piece on this puzzle, b/c there has to be a better way to communicate with local officials and find and immediate solution to the mobility and connectivity of the freight.
- Enhancements in transportation made as a relief to building more roads.
- The FDOT needs to recognize hub to hub connection on the SIS

- Unless goods and passengers can be moved efficiently and cost effectively between their origins/destinations and the port, users will go elsewhere to satisfy their own business models.
- Entire chain has to all work at lowest cost.

August 15, Tenants and Users Workshop Comments

- State is doing a good job at looking at freight corridors – but are a limited number, need new ideas and approaches to address issues like congestion – FTC is looking at new corridors – state wants to get input from private sector
- What percentage of cargo into S. Fla. Ports leaves the area? 20%
- How do we get more cargo into the area, not just from each other – in the past we have taken cargo from each other – need to focus getting cargo to benefit the state, compete with Charleston and Savannah –
- Where do we need to go?
- No one here from the labor

August 15, Tenants and Users Survey Comments

- Support Atlantic Commerce Corridor
- Efficient (cost effective) movement of cargo is critical not just for growth in trade, but to maintain present volumes.
- Extremely important, especially connecting the N/S corridor over the water.
- Also short the time trucks spend in ports.
- State of Florida (government) should purchase Florida East Coast Railway and then develop it.
- With the high price of land in this part of the state, it is important that intermodal connectivity be developed, to include all aspects, especially railroad.

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.

	<i>Critically Important</i>					<i>Less Important</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 Survey Responses (8/14)	19	17	3	1	0		4.3
Southeast Survey Responses (8/14)	6	5	0	1	0		4.3
Southeast Users 8/15 Survey Written Responses	10	4	3	0	0		4.4

Southeast Ports-Online Survey Comments

- Important not only to increase capacity, but competitiveness.
- Need to include berths as part of the overall system.
- Technology can play a big role in increasing throughput for land locked facilities
- Technology/systems that improve turn-times for trucks/rail to improve efficiency of ports/terminals.
- Different operators/trades have different requirements.
- Throughput may not depend on expensive upgrades.

August 15, Tenants and Users Workshop Comments:

- ❖ None offered

August 15, Tenants and Users Survey Comments

- SIS \$\$\$, Lack of Mobility
- Florida ports need seamless hardline systems for people and cargo in order to stay competitive in time/cost with competing non-Florida ports.
- Needs outside port land for empty containers and loaded if necessary.
- On-port systems are in pretty good shape.

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.

	<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 Survey Responses (8/14)	5	17	18	0	1	3.6
Southeast Survey Responses (8/14)	0	8	4	0	0	3.7
Southeast Users 8/15 Survey Written Responses	5	3	6	1	1	3.6

Southeast Ports-Online Survey Comments

- Diversification has helped protect ports from market changes and has helped expand revenues. An example is the cash flow provided by cruise operations for cargo facility construction at ports that have both cargo and cruise operations.
- Ports need to consider cost/benefit of all decisions and must be able to respond to opportunities in a timely manner.

August 15, Tenants and Users Workshop Comments

- We have to be honest and worry about cargo for Florida – the market is Orlando – easier to get a container into Savannah and then to Lakeland than through Miami because of congestion. Worry about moving cargo through our area, not north/south movement.
- Group of shippers in Central Florida prefer cargo going through Savannah – it was alarming
- Linkages are important – competitiveness can be addressed through connections
- Savannah gets 100% of state budget – congestion is a problem in terms competition – security is lower, don't have a state law
- FDLE is strangling the port
- FDLE is responding to the governor and the conditions – we have responded to the badges, fencing, lighting etc. – but state is pushing the envelope
- Florida has a far superior security system to Savannah – trucker access much easier
- I disagree – Citgo terminal in Savannah from a ship
- Here accommodating to systems, federal and state – it affects the bottom line of competitiveness

- How do ports secure its security services? Sole source and bid systems vary. Procurement can be affected by local governance
- Also recent change in law that is just now being implemented with local director making a threat assessment to be take to a regional council and then a statewide council – some flexibility has been added but not played out yet

August 15, Tenants and Users Survey Comments

- It is all a balance between losses vs. benefit
- It ties back to #1.
- As port expands, and as ships get larger (especially cruise ships), room needs to be left for smaller cruise ships. With Cuba becoming an opportunity for high-speed ferries we must diversify cruise options.

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

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Southeast Ports-Online Survey Comments

- Some communities with major ports still "don't get it" and do not acknowledge the economic benefit the port provides. Because they don't recognize these benefits, they sometimes ignore the port's transportation projects in favor of other priorities, frustrating port plans and putting the port at a competitive disadvantage.
- It is important to show in dollars the benefit of your port to the decision making folks. Please educating and meeting with these people it is very important.
- Public awareness is always a positive.

August 15, Tenants and Users Workshop Comments

- Jaxport just developed a curriculum with the local school port to educate on the importance of ports
- Direct and indirect jobs that are supported by ports – wages much higher than tourist and service industries
- Need educate econ dev agencies and enlist their support in telling the story of economic impact on the county and region
- Miami claims 16 billion impact
- Need to assist public on how to learn about the availability of port related jobs – an in and out market place
- Job fairs at Miami were very successful
- Brought in stevedores from Jaxport to work here at Port Everglades

- Port drivers are the worst paid, have been treated poorly – we play an important role in the movement of goods – time in the ports is a problem – anytime there is a problem at the gate it shuts them down – no one does anything – we are a vital part of the industry

August 15, Tenants and Users Survey Comments

- Tell our story!
- Although the port shouldn't be sites for convention centers, as though their thinking is this being port business.
- Greater public awareness, community outreach, public relations are needed. Involvement of commissioners in recognizing PA as huge asset is required.
- An age-old problem. The men and women in the street have no understanding of ports and the maritime community.
- Ports must do a better job of educating the public local/state about how important ports are to the local and regional economy.

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

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- Job fairs at Miami were very successful

- Brought in stevedores from Jaxport to work here at Port Everglades
- Port drivers are the worst paid, have been treated poorly – we play an important role in the movement of goods – time in the ports is a problem – anytime there is a problem at the gate it shuts them down – no one does anything – we are a vital part of the industry

August 15, Tenants and Users Survey Comments

- Prepare our ports to service larger ships.
- Must stay in line with global trend of bigger/deeper
- Deep water dredging (50') required to capture new vessels being built now.
- Overcrowding at ports needs to be addressed. Cruise lines, including day cruise lines and future ferry ops., need to be able to maintain schedules.
- Smaller regional vessels don't need the draft of larger container ships.
- Deeper port and turn around basin
- Dynamics = bigger and bigger ships.
- They're coming and we are not ready here at Port Everglades.

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

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 Survey Responses (8/14)	21	18	1	0	0	4.5
Southeast Survey Responses (8/14)	6	6	0	0	0	4.5
Southeast Users 8/15 Survey Written Responses	6	7	3	0	0	4.2

Southeast Ports-Online Survey Comments

- Competing on service is the best way to attract and retain customers.
- Better service equals happy existing tenants/users and the ability to attract new tenants/users
- Customers are the key to ports' growth and opportunities. Facilities and services keep customers.
- Efficient cost, effective access.

August 15, Tenants and Users Workshop Comments

- Savannah gets 100% state support – makes competing difficult
- Combines with incentives for local governments to develop warehouse and distribution centers in Georgia

August 15, Tenants and Users Survey Comments

- We can only compete if we move goods/people faster, better, cheaper--safer
- Land use more important, others have to build landmass. We should use out land with thought.
- Private sector and ports business plans must dovetail one another to maximize opportunities.
- Tariffs must be contained, especially as security costs increase.
- I know that the average citizen doesn't know the importance of economic values.

- Security costs too high.

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</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 Survey Responses (8/14)	10	20	5	4	0	3.9
Southeast Survey Responses (8/14)	3	8	0	1	0	4.1
Southeast Users 8/15 Survey Written Responses	4	5	5	2	0	3.7

Southeast Ports-Online Survey Comments

- Drawing jurisdictional lines, rather than opening the doors to regional collaboration, can impede attempts to enhance the intermodal mobility and connectivity the seaports need to move their goods and passengers.
- And pay dividends to Florida citizens by reduced cost of goods and reduced congestion.
- Given the growth rate of Florida this will prove to be more and more important!

August 15, Tenants and Users Workshop Comments

- Rationalization from a regional perspective – can no longer compete between local ports – need to rationalize who services are being provided to – may be losing too much to each other to the detriment of the region
- Cruise lines in terms of consolidation addresses that point

August 15, Tenants and Users Survey Comments

- Under 1 port authority
- While there may be a benefit from regional cooperation, the ports with more in common may be too competitive with each other, while the ports that could/would cooperate with each other may have less in common to make the cooperation less valuable.
- Improve port ID process and accept them throughout state now.
- Turf remains a problem here in the Southeast.
- Ports should stop competing against each other by cutting their rates to the detriment of the public's best interest.

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</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 Survey Responses (8/14)	17	16	6	1	1	4.1
Southeast Survey Responses (8/14)	3	7	2	0	0	4.1
Southeast Users 8/15 Survey Written Responses	7	6	1	1	2	3.9

Southeast Ports-Online Survey Comments

- Those who benefit from maritime initiatives should be encouraged to partner in the investments needed to implement those initiatives because public sector financial resources cannot pay for everything that is needed.
- Create incentive programs for private investment at your ports.
- Sometimes hard to achieve in certain political structures
- Excellent option to expedite results.
- Competitive issues between ports?

August 15, Tenants and Users Workshop Comments

- Limited land – need to come up with partnerships that increase the throughput of our ports – partnerships with our terminal operators including technological innovations.
- Private industry can produce infrastructure more efficiently
- Several models out there in cruise industry for creative ways to address
- But terminal operator needs long term commitment to sink in those kinds of costs, for that kind of partnership
- Resistance is greater on the govt. side of the issue – great potential but fighting history in the Broward Co. area

August 15, Tenants and Users Survey Comments

- Maximize dollars by investing strategically require 50/50 matching dollars
- Ideas and resources create growth
- Ports that are essential to national commerce should be supported with federal dollars. Security at ports is state and federal issue and should not be borne by port and port users.
- Ports to actively seek funds for development from users.
- If only the public sector would try it.

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 Survey Responses (8/14)	24	12	3	1	0	4.5
Southeast Survey Responses (8/14)	7	4	1	0	0	4.5
Southeast Users 8/15 Survey Written Responses	8	7	0	0	1	4.3

Southeast Ports-Online Survey Comments

- This is absolutely needed to fulfill the mission of Florida's seaports.
- Not an issue depending on the location of the port.

August 15, Tenants and Users Workshop Comments

- Cost to both doing this and to not doing this – need a balance

August 15, Tenants and Users Survey Comments

- Get in, get out, or get out of business
- Security plans must be nationally related to reasonable risks.
- Combine efforts of ports with airports.
- Port drivers are the worst paid workers in the port industry.
- Intermodal? Yes!

10. Ports are committed to the development, protection and preservation of permanent industrial land sites that enable port and industrial user to deal with business growth and limit residential uses that are not consistent with the port’s needs.

{This strategic issue was not included in the on-line survey, but was developed from the discussions at the first three seaport regional workshops and offered for reaction for the first time at this workshop.}

Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Southeast Users 8/15 Survey Written Responses	8	3	4	0	1	4.1

August 15, Tenants and Users Workshop Comments

- Developed during the discussion at the first SE regional workshop
- Too limited to the port, need to expand beyond the port gate to preserve the transportation connections beyond the port
- Highest and best use to promote trade should be considered around ports

August 15, Tenants and Users Survey Comments

- Tell our story--so that local leaders respond. Educate our local/state/federal leaders.
- Waterside port business need be for port trade only.
- There is not enough land to expand for any South Florida ports.

VI. 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 Summit taking place in Tampa. He invited the participants continuing participation in the process. 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

Southeast Coast Tenant & Users Regional Seaports Workshop Seaport Statewide Strategic Visioning and Planning Process August 15, 2006, Port Everglades, Florida, 1:00-3:30 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 and partnership roles
- To identify regional trends, headwinds and tailwinds
- To review the key components, shared needs and characteristics of regional and statewide seaport business planning models

Proposed Workshop Agenda

- 1:00 Welcome, Introductions/Participant Profile and Meeting Guidelines**
- 1:10 Overview of the Proposed Seaports Business Model Action Planning Process and Framework**
- 1:20 Context for Statewide and Regional Seaport Planning and Partnership Roles**
- 1:30 Identification, review and discussion of trends, headwinds and tailwinds**
■ Review and refine draft starter list.
- 2:15 Stretch Break**
- 2:25 Identification and refinement of shared strategic issues from the seaport business planning models in the region.**
■ Overview of key components of seaports business planning models
■ Review and refine draft starter list of shared strategic issues.
- 3:15 Next Steps, Statewide Summit and Strategies Survey and Meeting Evaluation**
- 3:30 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
Southeast Coast Tenants & Users Regional Seaports Workshop
Seaport Statewide Strategic Visioning and Planning Process
August 15, 2006, Port Everglades, Florida, 1:00-3:30 PM

	<u>Agree</u> ☺	☹	<u>Disagree</u> ☹	<i>CIRCLE</i>	
<i>ONE</i>					
<u>WERE THE WORKSHOP OBJECTIVES MET?</u>	5	4	3	2	1 =Avg
• To review the proposed Seaports Business Model Action Planning Process	5	7	4	0	0 =4.1
• To review the context for statewide and regional seaport planning and partnership roles	6	8	2	0	0 =4.3
• To identify regional trends, headwinds and tailwinds	7	6	3	0	0 =4.3
• To review the key components, shared needs and characteristics of regional and statewide seaport business planning models	5	6	5	0	0 =4.0
<u>WORKSHOP ORGANIZATION?</u>					
◆ Background and agenda packet were helpful	7	9	0	0	0 =4.4
◆ Plenary discussion format was effective	9	4	3	0	0 =4.4
◆ Facilitators guided participant efforts effectively	9	5	1	0	0 =4.5
◆ Participation was balanced	7	3	4	1	0 =4.1

What Did You Like Best About the Workshop?

- Openness of others
- Interesting group
- Open forum
- Direct approach to shared problems
- The give and take; open discussion
- Openness
- Open
- Gave an opportunity for stakeholders to participate
- Free, easy and open discussion

What Could be Improved?

- Space was not conducive to open discussion
- More on transportation issues
- Send information out before the meeting so participants can review it ahead of time
- Not all sectors were represented

- “Tell our story” often
- Roundtable setting would have been better

Other Comments (continue on back if needed)

- Ports must do a better job of educating the public on their value to the local and regional economy
- Because this was held in the summer, the cruise interests were under represented

Appendix #3 List of Workshop Participants
West Coast and Panhandle Regional Seaports Workshop
August 4, 2006, Tampa, Florida, 10:00-3:30 PM

<u>Participants</u>	<u>Organization Represented</u>
Pedro Acevedo	Hamburg Sud. N.A.
Phillip Allen	Port Everglades
David Anderton	Port Everglades
Mark Baker	APM Terminals
John Ballestero	Port of Miami Terminal Operating Co.
Robert Barcelo	Hanjin Shipping
Bruce Brecheisen	Seaboard Marine
Carlos Buqueras	Port Everglades
Major Connie Cooper	Miami Dade Police – Port of Miami
Dan Cummings	Broward Sheriff's Office – Port Everglades
Meredith Dahlrose	FDOT Seaport Office
Robert Everson (sp?)	Atlantic & Pacific Maritime
Randy Feldbruegge	Intertek Caleb Brett
Jean Fitzgerald	J. Fitzgerald & Associates
John Fox	Royal Caribbean Cruises. Ltd.
Bert Gonzalez	Miami Dade Police – Port of Miami
John Gorman	Florida Transportation Services
Richard Heidrich	DMJM Harris, Inc.
Ruby Hogan	DHS - Customs and Border Protection
Harold Jackson	Carter & Burgess
Judi Jarvis	Sea Escape Cruises
Bill Johnson	Port of Miami
Margaret Kempel	PLE Association
Girish Kumar	HNTB Corp./MDX GEC
Juan Kuryla	Port of Miami
Robert Kwokiewics (sp?)	Ship Supply
John LaCapra	Florida Ports Council
Pamela Landi	Broward County – OPGR
Joseph Muldoon	Eller & Co.
Charles Murdock	Merchant Marine Officers
Arthur Novacek	Eller & Co.
Charles O'Malley	Port of Miami Terminal Operating Co.
Bruno Ramos	BEA International
Jorge Roviroso	Florida Stevedoring – PET – Farovi Shipping
Khalid Salahuddin	Port of Miami
Joan Sanchez-Schnettler	J. D. Sanchez Consulting, Inc.
Paul Stanton	Port Everglades
Susan Stefanello	DHS - Customs and Border Protection
Jim Stewart	Teamsters Port Division
Sally Stirn	Holland America Line
Carlos Valdes	Trade Transport Council

Eduardo Verdayes
Participants (cont.)
Rick Vogel
Michael Williamson

Support Trucking Group
Organization Represented (cont.)
South Florida Petroleum Services
Cambridge Systematics

Process and Facilitation Team:

Chuck Towsley
Bob Jones
Hal Beardall

Maritime Directions
Florida Conflict Resolution Consortium
Florida Conflict Resolution Consortium

Appendix #4- 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 form 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.