

Seaport Statewide Strategic Visioning and Planning Process

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“The future ain’t what it used to be. -Y Berra

”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



QuickTime™ and a
TIFF (Uncompressed) decompressor
are needed to see this picture.

Seaport Statewide Strategic Visioning and Planning Process
Southeast Coast Regional Seaports Workshop
July 14th, 2006, Port of Miami-Dade

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EXECUTIVE SUMMARY

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 meetings of the Florida Ports Financing Commission, the Florida Ports Council and the Florida Seaport Transportation and Economic Development Council 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 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. He reviewed a proposed sequence of regional and statewide meetings noting there would be two additional regional workshops in Jacksonville and Tampa leading to a statewide summit in late August. Participants suggested a clearer articulation of the compelling need for securing funding should be part of the process description.

Mr. Towsley then introduced the meeting facilitators, Bob Jones and 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: Phillip Allen (Port Everglades), Lori Baer (Port of Palm Beach), Bill Johnson (Port of Miami) and Amy Kimball-Murley (representing Port of Key West), ports 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 for consideration of a statewide and regional strategic Florida seaports plan. The facilitators invited participant comments which focused on:

- Updates on individual seaport master plans,
- The South Florida Transportation Commission and the 3 MPO long range transportation plans,
- The statewide Strategic Intermodal Plan and the identification of connectors in the region and the need to identify hub-to-hub connections;
- The Atlantic Commerce Corridor assessment and federal corridor designation
- Follow up to the June, 2006 South Florida Regional Freight Summit
- How Districts and their workplans are addressing intermodal planning
- The importance of involving and coordinating with regional airport plans.

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 agreed on and expanded 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
- South Florida Regional Transportation Authority
- The three MPOs and the South Florida Transportation Commission
- RPCs- South Florida and Treasure Coast
- Florida Seaport Tenant/User Stakeholders
- The Florida Department of Transportation-Headquarters- Inter-modal Division and Planning District Offices
- Florida Ocean Alliance
- The Florida Transportation Commission
- Local Government

Workshop participants reviewed and refined draft starter list of trends, headwinds and tailwinds. In general, there was agreement that the trends needed to reflect the contribution and trends related to the North American and Florida based cruise industry.

Opportunities for Seaports statewide and regionally that participants identified included: a growing recognition statewide among the public and private sectors of importance of seaports for the state's economy; agreement among all Florida seaports of the need to work together statewide to sustain the economic engine; a greater focus on corridor and regional thinking, planning and initiatives; opportunities to link transit funding and projects with freight rail infrastructure needed; building on the designation of the Atlantic Commerce Corridor through planning and funding; ways regional seaports can work together to clarify and differentiate niches and help each others strategic planning; using technology to increase throughput; growing support for developing a better regional intergovernmental policy- support for economic development and the regional ports role; three ports in the region served by one railroad, the FEC, which helps to enhance intermodalism.

Challenges for seaports statewide and regionally that participants identified included: Unfunded security regulations on the cruise and cargo side; Insurance cost is a growing challenge/problem; 100% increase to insure port assets in Palm Beach; Miami Port with insurance with cranes; Transit not clearly recognized by the SIS- hard to get transit \$\$ for improvement in the corridor; NAFTA; exposure to extreme weather; constrained land- urban development that affects some ports greater than others; incremental costs of growth; land values as a pressure on port development in the region which also works to cut out port support businesses; continue to deal with past poor planning and siting decisions; community and environmental challenges- especially in environmentally sensitive areas; and balancing business with politics.

Each Port Director provided an overview of the key components for their business planning models. Participants reviewed and refined a set of **shared needs based on the seaport business planning models** in the region including:

- Improve inter and intra regional freight and passenger mobility connectivity in transportation corridors.
- 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.

- 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.
- 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.
- 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
- Support waterside navigation improvement that can accommodate dynamics of shipping market vessel changes in a timely manner.
- Address port user needs. Provide market sensitive facility and service costs to port users to retain and expand business opportunities
- Promote regional cooperation to maximize use of resources and create synergies to benefit both public and private sector freight and passenger interests throughout Florida
- Encourage public-private partnerships that maximize financial resources and collaboration between ports, the state and the private sector industry, local government and communities.
- 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

The participants reviewed and refined a draft starter list of guiding planning principles.

Substantive Planning Principles

- 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.
- 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.
- The Florida seaports must find and build into the strategic plan the appropriate balances between commerce, global competition, mobility, and security.
- The Florida seaports must find and build into the strategic plan the appropriate balance between mobility and the impacts on the environment and community.

Planning Process Principles

- The development of the seaport strategic plan should be a collaborative effort directly involving and engaging the state's 14 deep water ports, 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.
- 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.

Mr. Towsley thanked the participants for their participation and input. He suggested that their involvement on short notice on a Friday afternoon spoke of their commitment and interest in contributing to this important effort. He reminded them of the sequence of regional workshops and the late August Summit. The Port Directors pointed out the critical need to include port users or stakeholders in the process. Mr. Towsley suggested that Port Directors should let Florida Ports Council know of their users who should be contacted regarding the future regional workshops, the Summit and the online survey. He invited the participants continuing participation in the process and agreed to design an online survey to get a variety of Port, Port User and Port Partner input and reactions to the revised shared need statements

and planning principles and assumptions. The facilitators noted the participants would be notified when Workshop summary is posted on the Ports Council website.

**Southeast Coast Regional Seaports Workshop
Seaport Statewide Strategic Visioning and Planning Process
July 14th, 2006, Port of Miami-Dade, 1- 5 PM**

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Facilitator’s Workshop Summary

I. Welcome, Introductions and Review of Agenda

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, the Florida Ports Financing Commission and Florida Seaport Transportation and Economic Development Council (FSTED) are looking to constructively respond to the recent 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. Chuck noted there would be two additional workshops in Jacksonville and Tampa leading to a statewide summit in late August.

Mr. Towsley then introduced the meeting facilitators, Bob Jones and Hal Beardall from the Florida Conflict Resolution Consortium, based 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 regulators on issues such a dredging permits. 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: Phillip Allen (Port Everglades), Lori Baer (Port of Palm Beach), Bill Johnson (Port of Miami) and Amy Kimball-Murley (representing Port of Key West), ports staff and technical consultants, FDOT District staff, cargo and cruise port user representatives and rail partners (see appendix 2 for a full 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 meetings of the Florida Ports Financing Commission, 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 proposed sequence of meetings:

- Convene three regional seaports workshops- Southeast-July14, Miami, Jacksonville, July 25, and Tampa August 4, 2006—focused on identifying shared business model regional and statewide needs, key strategic issues and guiding principles and planning assumptions
- Convene a Statewide Seaports Strategic Planning Summit in late August 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.
- Presentation of Summit results and recommendations to the Florida Ports Council Finance Commission (September 6, 2006) Florida Transportation Commission (September 7, 2006) and the Florida Maritime Leadership Conference (September 28).

Participant Comments 7-14

- Does this adequately address the Ports' concern regarding statewide funding as a reason for initiating this process? Overall objective is to educate state decision makers on the compelling needs statewide and regionally for additional funding. Need to show the Legislature that the seaports are working together, know what they are doing and where they are going.
- How will port users be engaged in advance of the Summit to get their input? How are they being involved in the regional workshops? What will be their involvement at the Summit? May need to consider what portions of the Summit or pre-Summit activities the port users can participate in.
- Critical to gain support of our users. E.g. of a successful effort of involving port users includes how this year's security issues were handled in the Legislature.

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 (additions to the list noted with underline):

A. Seaport Master Plans (9J5)

Participant Comments 7-14

- Port Everglades in midst of Master plan update. Last presented right after 9-11. Now being updated.
- Palm Beach approved master plan last year
- Port of Miami is working on master plan update in coming year

- Strategic Regional Freight Summit in June 2006
- Key West is updating master plan in next year. Incorporating into overall water front master plan- deep water port and ties in other marine industry components. And major military link/ navy and coast guard facility.
- No current statutory requirement for updating at particular time period. Ports recognize good planning needs to be updated.
- Some ports separate strategic plans vs. master plans.

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

Participant Comments 7-14

- Regional LRTP created by the South Florida Transportation Commission (Miami Dade, Broward & Palm Beach MPOs)

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 Palm Beach, District 4*- I-95 to SR 708 to Old Dixie to port cargo access road to planned port cargo entrance; I-95 to SR 710 to Old Dixie; I-95 to 45th Street to US 1 to 11th Street to Cruise Entrance. *Port Everglades, District 4*. I-95 to SR 84 to Spangler Blvd. to port entrance; I-595 east straight into port entrance. *Port of Miami, District 6*. I-395 to 2nd Ave. 1st Ave to NE 5th Ave. to NE 5th St. NE 6th St. to Port Blvd entrance; Tunnel from I-395 to Port Blvd. entrance.

Participant Comments 7-14

- SIS eligibility criteria?-- e.g. container yards—
- 3 ½ years since SIS thresholds first developed- opportunity for ports to look at this again. 5 years a long time.

H. Regional Efforts

- South Florida Regional Freight Summit, June 2006
- Atlantic Commerce Corridor Assessment, November 2003)

Participant Comments 7-14

- SF regional summit in 2002- all modes brought forth the Atlantic Commerce Corridor.
- 2007 five year conference on the corridor and seek new funding in 2009.

I. FDOT District Work Plans

Participant Comments 7-14

- District 4 proactive in pushing inter modal planning.
- District 4 has 21 connectors and done a strategic analysis of each, starting to program out 5 years of SIS \$\$ through FY 2016.
- Funding of hub-to-hub projects not yet recognized. But SIS is an evolving planning process. Hope to continue to improve.

- Some concern for ports that are not designated by the SIS. Intermodal- true blue connections in Key West which supports the cruise market. Most successful sustained ferry service in Florida. Process needs to be open. Don't focus merely on the SIS system.

J. South Florida Regional Transportation Authority

K. Airport Master/Strategic Plans

Participant Comments 7-14

- Partner planning- missing airport planning in region and connections. Hub to hub connections is important way to connect airports with seaports.
- Don't overlook the cargo aspect of MIA. As PB grows air cargo there will be interactions needed. Ports need to work together on the distribution system.

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 agreed on and expanded (indicated by underline) 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
- South Florida Regional Transportation Authority
- 3 MPOs and the South Florida Transportation Commission

Participant Comments 7-14

- In Port Everglades has a seat at the table but have been frustrated trying to get the MPOs to recognize port projects and receive funding through that process. Only have “access” projects not others. MPO \$\$ inside the gate? Perhaps this process can help change that.
- Look at experiences of different ports with MPOs and extract lessons learned.
- Palm Beach relationship with MPO very beneficial/successful.
- Miami MPO established a freight advisory committee.
- Several state agencies are members of the FSTED Council, but DEP is not and we need to address that gap
- Community and environmental groups affecting way ports are operating and planning. They can be powerful in shaping ports future.
- RPCs- South Florida and Treasure Coast
- Florida Seaport Tenant/User Stakeholders (~~including the Trade and Transport Council~~)

Participant Comments 7-14

- Need to be more expansive of the tenants and stakeholders.
- The Florida Department of Transportation-Headquarters- Inter-modal Division and Planning District Offices
- Florida Ocean Alliance
- The Florida Transportation Commission

- Local Government

V. Regional Trends, Tailwinds and Headwinds

Workshop participants reviewed and refined a draft starter list of trends, tailwinds (opportunities) and headwinds (challenges).

Global Trends

- Increasing competition on the global stage
- Florida's trading partners are diverse from 12 global regions.
- Continued rapid growth of China as a producer and consumer and its disruption of established trade and manufacturing partners.
- Continued growth of Florida's traditional trading partners.
- Continued globalization of production and consumption
- More liner services from Asia to the East Coast, to avoid West Coast congestion. (Panama Canal expansion)
- More short-sea shipping opportunities
- Vessels continue to get larger and deeper

Additional trends identified by participants 7-14

- Need to add some global cruise/passenger trends to balance the focus on cargo/freight.

State and Regional Trends

- The value of Florida's total international trade exceeded a forecast for 2005 of \$78.3 billion by nearly \$20 billion.
- The value of waterborne cargo grew by 22.4% (compared with a 5.4% increase in airborne cargo) and reached 62.9 billion, more than 2/3s of the state's total international trade and is 3 years ahead of forecasts.
- Strained financial resources for infrastructure investment
- Escalating security costs
- Increasing policy focus on regional strategies for action
- Market diversification
- Traffic congestion at local and regional getting worse and growth of urban areas.
- Growth management issues/pressures.
- Rail lines dealing with pressures for passenger vs. freight service?

Additional trends identified by participants 7-147-14

- Need to add some cruise/passenger trends both state/regional level to balance the focus on cargo and freight. Economic impact of cruise industry can be powerful. Need to add info on trends in the North American cruise market.
- Keep in mind the shifting winds and volatile markets that affect the cruise industry- e.g. currently European cruises are up, US Caribbean markets are softer. This can change quickly based on events and political instabilities.

Statewide Tailwinds (Opportunities aiding Florida's seaports)

Opportunities identified by participants 7-14

- Growing recognition statewide of importance of seaports for the state's economy
- All ports need to work together statewide to sustain the economic engine.

- NAFTA

Regional Tailwinds (Opportunities aiding Florida's seaports)

Opportunities identified by participants 7-14

- Public and private sector attitudes regarding ports and their role
- Opportunities for transit projects- get funding that can help pay for rail and other infrastructure improvement for freight rail.
- Build on the Atlantic Commerce Corridor.
- Palm Beach able to accommodate overflow from Miami and Port Everglades.
- Opportunity to differential market points- e.g. Everglades is reducing bulk. PB can meet gap.
- Increase in planning and thinking regionally.
- Increasing throughput through technology. Recognize through the total system and more productive use of land you have (e.g. RTGs, better coordination between ag inspections and customs)
- Great opportunities for thinking regionally in SF especially on economic development fund (Beacon Council, Broward Alliance, etc.)
- Opportunities for evolving through collaboration niches of the various seaports and airports etc.
- Support for developing a better regional intergovernmental policy- support for the ports is on a regional basis. Enough business for all three to grow. Important to communicate and work together.
- All three ports served by one railroad-FEC- helps with enhancing intermodalism.

Statewide Headwinds (Challenges potentially hindering Florida's seaports)

Challenges identified by participants 7-14

- Unfunded security regulations on the cruise and cargo side.
- Insurance cost is a growing challenge/problem. 100% increase to insure port assets in Palm Beach. Miami Port with insurance with cranes.
- Transit not clearly recognized by the SIS- hard to get transit \$\$ for improvement in the corridor.

Regional Headwinds (Challenges potentially hindering Florida's seaports)

Challenges identified by participants 7-14

- Public and private sector attitudes and education regarding ports and their role, value and contributions.
- Constrained land- urban development. Affecting some ports greater than others. Affects growing the port- in terms of deepening channels etc.
- Incremental costs of growth.
- Land values put pressure on our port development. Economic competition for land use undercuts businesses that support the ports.
- Dealing with poor planning and siting decisions in the past.
- Increase in planning and thinking regionally.
- Community and environmental challenges- especially in environmentally sensitive areas
- Balancing business with politics.

- Exposure to severe weather – hurricane preparedness.

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

Palm Beach

- Add development of inland port as strategic regional and Palm Beach port initiative.
- Day cruise passenger experience. Ferry fell victim to rising fuels and hurricanes.
- Fuel import-use of fuel oil will drop off over next 10 years. 1 million of 4 million tons.
- Service exclusively export to countries of Caribbean. Unique highly specialized in serving island countries.
- Access challenged- issues and at grade crossing, interstate interchanges, cost of land, straddles 2 cities
- Increase rail capacity and more options for rail with greater interconnectivity at various ports.
- Deepening and widening of channel- under study

Port Everglades

- New mission statement and update numbers e.g. more TEUs
- ICTF near dock rail facilities only partially funded yet funding for overpass.
- Too much concentration on dredge material sites-
- Creation of berth 34.
- Attitude among regional boards- what is good for business is a set of ports competing on levels of service (vs. just price). How to get the throughput.

Key West

- No cargo. Passenger- port of call service- different kind of business. If stopped tomorrow would be a huge impact on other regional ports. Small port, managing 1 million (\$2 million revenue passengers). Regional model for success needs to be taken into account.
- Need to add ferry passenger #s—recreational and commuter
- Port operates with a feedback loop to the community- financial- involvement. Job generation alone wasn't enough for Key West. Promote the port by pointing to other benefits besides just jobs. Financial burden and a constraint on growth of port.

Miami

- Update #s to reflect changes since the Mission Plan published.
- Reducing and reversing escalating security and operating costs. (net cut of 3.5-4 million next year)
- Investing in routine maintenance.
- Putting new large capital program- \$65 million for capital infrastructure next year. Looking over the next 5 years - \$350 million. Lots of new debt to provide new cargo facilities.

- Port tunnel is significant issue- will have indication soon on this on county and ports position.
- Dredging project in phase 3- state participation- deep to 50+ feet.
- Wants to continue to have strong relationship regionally. Region benefits working together.
- Also within Miami Dade working more effectively together with the airports.

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 Southeast region.

Participant Comments 7-14 on List as a Whole:

- These aren't "characteristics" more like "needs"

SHARED NEEDS AND CHARACTERISTICS BASED ON SEAPORT BUSINESS MODELS AND MARKET DYNAMICS (DRAFT LIST, NOT IN PRIORITY ORDER)

1. Improve inter and intra regional freight mobility connectivity in transportation corridors. Support economic growth and competitiveness of domestic & international trade through efficient transportation corridors-improved inter and intra regional freight mobility connectivity.

Participant Comments 7-14

- Focus on cargo- but this affects all aspects of business.
- How is "domestic" defined regarding Port's role? E.g. petroleum, short sea , rail. How to optimize or prioritize one over the other. Need to recognize both as directly competing opportunities. E.g. Puerto Rico to Jax, from Gulf states to Tampa.
- Separate item: cruise passenger and ferry passenger activities as a business dynamic.
- Need statement- committed to development of permanent industrial land sites not for residential that limit port and industrial uses to deal with cargo growth. This is a limited resource that needs protection and preservation.

2. 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.

Participant Comments 7-14

- Agreement with the statement, no comments

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.

Participant Comments 7-14

- “Diversification” – where do we talk in terms of rationalization in the region and the state- i.e. customers we are best able to serve within the region. Limited resources. Ways as a port community start to rationalize benefits port by port.
- Is this happening in terms of investment and return on investment?
- Diversification is needed for good bond ratings.
- Performance measures to prioritize projects at the state level?
- Need openness and communication in the region and statewide about diversification and clarifying niches.
- What is the right use for port assets? Need to look at rationalization. Highest and best use over the long term. Identify the needs of community over the longer haul.
- Regional Transportation Authority- e.g. of a good step forward.
- Promote South Florida when abroad- market as a region.

4. Ports as regional economic engines. Retain and stimulate economic development & job growth- ports as economic engines of their local communities, regions, state and nation

Participant Comments 7-14

- As noted earlier under challenges/headwinds, land values put pressure on port development.
- Add “local”

5. Waterside navigation improvement that can accommodate dynamics of shipping market vessel changes in a timely manner

Participant Comments 7-14

- Agreement with the statement, no comments

6. Address port user needs. Provide market sensitive facility and service costs to port users to retain and expand business opportunities

Participant Comments 7-14

- E.g. challenges on security costs that price you out of the market. How much can your business bear?

7. Promote regional cooperation to maximize use of resources. Create synergies to benefit both public and private sector freight and passenger interests throughout Florida

Participant Comments 7-14

- Add passenger focus to the shared need.

8. Encourage public-private partnerships that maximize financial resources and collaboration between ports, the state and the ~~maritime~~ private sector industry

Participant Comments 7-14

- What is the benefit to the private sector?
- Add local government and communities.
- Maritime industry—limits- “private sector”

9. Ensure a safe, secure, sustainable and cost effective logistics chain as part of an intermodal transportation system for the transport of people and goods. Build a truly

intermodal transportation system that provides seamless connections while ensuring a safe, secure, sustainable and cost effective logistics chain for transport of people and goods

Participant Comments 7-14

- “Inter modal”- what does this mean. Explicitly acknowledge “blue water” connection. “Truly”
- SIS- needed and still need a gap analysis in terms of the inter modal system.
- Sometimes it is an economic connection that makes something intermodal.
- Is this the “hub to hub” issue? Missing link. Connecting passengers port to port.

Others Needs or Participant Comments- 7-14

- How beneficial FSTED dollars to all the ports. Need to underscore the stabilizing beneficial – need to continue so all benefit. Collaborative effort among seaports- collective strengths and energies.
- Expand D- state ports network economic engine for the country. Florida’ is 4th taken together, in the country.
- Focus on cargo here. To get state attention- tourism based economy. Cruise industry as a important part of tourism.
- Stewards of our community and environment? Shared need to engage successfully with impacted community. Connection of the seaport to the community.
- Acknowledge that some things are unique and not regionally driven. Ports have niches. Those needed to be identified regionally- so other ports can help sustain the niches. Sometimes related to the historical development of the ports.
- Recognize as a shared need that ports function as businesses- timeliness flexibility.

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.

Substantive Planning 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.

Participant Comments 7-14

- Acknowledge passenger service

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.

Participant Comments 7-14

- Use “system”
3. The Florida seaports must find an appropriate balance between commerce, global competition, mobility, and security.

Participant Comments 7-14

- Since 9/11 the balance has been between commerce and security.
- Reformulate the other areas in a separate principle addressing: environment, community, cruise.

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, all modes of transportation (seaports, railroads, airports, highways, transit, trucking and space).

Participant Comments 7-14

- Is there a room big enough for this? You do this in different ways.
 - Following “all modes”- add trucking to the list
 - Cambridge report absent in addressing passenger.
 - Look at both cargo and passenger characteristics.
 - Important to continued to work collectively with FSTED and Ports Council too
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.

Participant Comments 7-14

- Agreement with the statement, no comments

VIII. Next Steps

Mr. Towsley thanked the participants for their participation and input. He suggested that their involvement on short notice on a Friday afternoon spoke of their commitment and interest in contributing to this important effort. He reminded them of the sequence of regional workshops and the late August Summit. The Port Directors pointed out the critical need to include port users or stakeholders in the process. He suggested that Port Directors should let Florida Ports Council know of their users who should be contacted regarding the Summit and the online survey. He invited the participants continuing participation in the process and agreed to design an online survey to get a variety of Port, Port User and Port Partner input and reactions to the revised shared need statements and planning principles and assumptions. The facilitators noted the participants would be notified when Workshop summary is posted on the Ports Council website. The meeting adjourned at 4:45 p.m.

Appendix #1 Workshop Evaluation Summary
Southeast Coast Regional Seaports Workshop
Seaport Statewide Strategic Visioning and Planning Process
July 14th, 2006, Port of Miami-Dade, 1- 5 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	6	8	1	0	0 = 4.2
• To review the context for statewide and regional seaport planning	6	7	2	0	0 = 4.1
• To review state and regional partnership roles and responsibilities	5	6	2	2	0 = 3.9
• To identify regional trends, headwinds and tailwinds	9	4	2	0	0 = 4.5
• To review the key components, shared needs and characteristics of regional and statewide seaport business planning models	7	5	0	0	0 = 4.6
• 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	2	7	6	0	0 = 3.7
 WORKSHOP ORGANIZATION					
◆ Background and agenda packet were helpful	8	5	2	0	0 = 4.4
◆ Plenary discussion format was effective	5	7	2	0	0 = 4.2
◆ Facilitators guided participant efforts effectively	6	9	0	0	0 = 4.4
◆ Participation was balanced	7	5	3	0	0 = 4.3
 What Did You Like Best About the Workshop?					
• Collegiality of discussions					
• Opportunity to interact					
• Having all four ports together agreeing on the need for regional coordination					
• This is the first step in working together as a “regional port system; the discussions should continue					
• Good to get key port staff together to discuss these types of issues. It will have immediate and delayed affect					
• Always a good process with the Consortium					
• A very informative workshop about the ports					

- Facilitators encouraged input from the participants, who in turn spoke openly on the relevant issues.
- Comfortable atmosphere for presenting ideas. Was not dominated by any one individual or port
- Very pleased that FEC and FDOT District were present
- I liked the format and the afternoon time from 1:00-5:00
- Good background information. Facilitators did a nice job of engaging participants
- Opportunity to freely express potentially sensitive issues
- Facilitator and consultant preparedness

What Could be Improved?

- Discussion to identify regional trends and to refine draft guiding principles was too rushed
- Better definition of “seaport business model”
- Needs and principles need “wordsmithing.”
- Logistics – leaving Miami at 5:00 pm is a very difficult task
- Take turns hosting
- Develop alternate potential scenarios to stimulate discussion
- I believe that a document should be generated to help guidance to this strategic planning. This document should also be used to take to public officials an increase in the level of funding given to the ports. At a higher federal and state level. Additionally, use this information/document to educate local elected officials to work with you in the development of your ports. Waterside and landside areas should be supported as well.
- More time in advance to read materials and backup
- Need to enhance the breadth of the materials to make the discussions broad based to be meaningful to all ports
- Get agendas sooner

Other Comments

- More focus on regional characteristics in addition to overall seaport needs
- Tough to get participation late on a Friday
- At the Summit in late August can we do short presentations on each port upfront. Sometimes we assume that the ports know all about one another, but that is not always the case.
- Actually more substantive than I expected at the outset
- Need to gain industry input
- Port user participation is crucial
- Non-Friday pm meetings

Appendix #2 List of Workshop Participants

Southeast Regional Seaports Workshop
July 14, 2006
Port of Miami

<u>Participants</u>	<u>Organization Represented</u>
1. Phillip Allen	Port Everglades
2. David Anderton	Port Everglades
3. Kathy E. Address	Port of Palm Beach
4. Lori Baer	Port of Palm Beach
5. Andrea Chao	FDOT – District 6
6. Robert Flint	Port Everglades
7. Richard Heidrich	DMJM Harris
8. Bill Johnson	Port of Miami
9. Raymond J. Jones	Florida East Coast Railway
10. Margaret Kempel	P.E. Association
11. Amy Kimball-Murley	Representing Key West
12. Juan Kuryla	Port of Miami
13. David Mock	CH2MHill for PPB
14. Khalid Salahuddin	Port of Miami
15. Jennifer Sanchez	Port of Miami
16. Joan Sanchez-Schnettler	J.D. Sanchez Consulting
17. Jeff Weidner	FDOT – District 4

Process and Facilitation Team:

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

Appendix #3 Workshop Packet
Southeast Coast Regional Seaports Workshop
Seaport Statewide Strategic Visioning and Planning Process
July 14th, 2006, Port of Miami-Dade, 1- 5 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

- 1:00 Welcome, Introductions/Participant Profile and Meeting Guidelines**
- 1:15 Overview of the Proposed Seaports Business Model Action Planning Process and Framework**
- 1:30 Context for Statewide and Regional Seaport Planning**
- 1:45 Partnership Roles and Responsibilities**
- 2:00 Identification, review and discussion of regional trends, headwinds and tailwinds**
■ Review and refine draft starter list.
- 2:30 Overview of the key components for business planning models for each of the regional ports: *Port of Palm Beach, Port Everglades, Port of Miami, Port of Key West***
- 3:15 Break**
- 3:30 Identification and refinement of shared needs and characteristics of the seaport business planning models in the region.**
■ Review and refine draft starter list.
- 4:00 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.
- 4:50 Next Steps, Key Issues and Strategies Survey and Meeting Evaluation**
- 5:00 Adjourn**

Participant Profile

- **Port Directors and their staff**
- **FDOT- HQ and District Secretaries and staff**
- **Local government representatives**
- **Port users/ tenants- Cargo**
- **Port users/tenants- Cruise**
- **Other Port users**
- **Representative of other modes:**
 - **Rail**
 - **Transit**
 - **Aiport**
 - **Highway**
- **Technical consultants**
- **Other transportation partners**

Proposed Workshop Guidelines

- ◆ **Take opportunity to explore strategic seaport issues in greater depth.**
- ◆ **Don't interrupt each other. Interrupt the facilitators.**
- ◆ **Share the airtime with your partners.**
- ◆ **Be candid but respectful.**
- ◆ **“Discouraging words” are ok. “Encouraging words” are also ok.**
- ◆ **Relax and enjoy.**

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***

Workshops/Summit/ Meetings

- **Regional Seaports Workshops- July-August, 2006-- Business Model Action Planning, Guiding Principles and Key Issues**
- **Statewide Seaports Strategic Planning Summit- 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 Florida Transportation Commission and the Florida Maritime Leadership Conference in September.**

Seaport and Related Partner Plans

Seaport Master Plans- establish goals and objectives for port development and expansion consistent with the comprehensive plans of seaports' respective local governments, and identify 5 year capital improvement programs to implement them.

Five Year Plan to Achieve the Mission of Florida's Seaports. Sets forth strategic actionable 5 year statewide seaport objectives.

I. Florida's International Trade Trends

Dollar value of Florida's Waterborne and Airborne International Commerce; Import-Export balance; Regional distribution of Florida's international commerce; Florida's Top Trading Partners; Florida's Import/Export Markets; Top Commodities through Florida Gateways.

II. Cargo and Cruise Operations at Florida's Seaports

Record Achievements; Dollar Value of Waterborne Cargo; Seaport Tonnage; Container movements; Cruise Passengers.

III. Statewide Intermodal Connectivity and Seaport Access

Corridors of Commerce; Seaport Connectors; Florida's Intermodal Rail System; Short Sea Shipping Initiatives; Intelligent Transportation Systems; Partnering for Improved Intermodal Connectivity

IV. Seaport Capital Improvement Needs and Financial Resources

Five year Capital Needs Plan; Off Port Intermodal Capital Investments; Financial Capacity Analysis; Balancing Commerce and Security; Amassing Capital to Fund Capacity-Enhancing Infrastructure.

MPO Long Range and Short Range Transportation Plans

Local Comprehensive Plans

Florida 2025 Transportation Plan

Strategic Intermodal System Plan

Seaport Connectors: *Port of Palm Beach, District 4-* I-95 to SR 708 to Old Dixie to port cargo access road to planned port cargo entrance; I-95 to SR 710 to Old Dixie; I-95 to 45th Street to US 1 to 11th Street to Cruise Entrance. *Port Everglades, District 4.* I-95 to SR 84 to Spangler Blvd. to port entrance; I-595 east straight into port entrance. *Port of Miami, District 6.* I-395 to 2nd Ave. 1st Ave to NE 5th Ave. to NE 5th St. NE 6th St. to Port Blvd entrance; Tunnel from I-395 to Port Blvd. entrance.

Strategic Regional Policy Plans

- South Florida Regional Freight Summit, June 2006
- Atlantic Commerce Corridor Assessment, November 2003)

FDOT District Work Plans

Key Groups- Roles and Responsibilities

INSTRUCTIONS: Please review this list of key Seaport groups. Note suggestions for roles in developing a strategic plan for Florida Seaports. We will take and record your suggestions in a plenary session.

The 14 Deep Water Port Directors, Staff and Governing Boards

Roles and Responsibilities

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

Roles and Responsibilities

Florida Ports Council

Roles and Responsibilities

Florida Ports Financing Commission

Roles and Responsibilities

Florida Seaport Stakeholders (including the Trade and Transport Council)

Roles and Responsibilities

The Florida Department of Transportation

Headquarters- Intermodal Division and Planning

Roles and Responsibilities

District Offices

Roles and Responsibilities

Florida Ocean Alliance

Roles and Responsibilities

The Florida Transportation Commission

Roles and Responsibilities

Local Government

Roles and Responsibilities

Other

REGIONAL TRENDS, TAILWINDS (OPPORTUNITIES) AND HEADWINDS (CHALLENGES) WORKSHEET

Global Trends

- Increasing competition on the global stage
- Florida's trading partners are diverse from 12 global regions.
- Continued rapid growth of China as a producer and consumer and its disruption of established trade and manufacturing partners.
- Continued growth of Florida's traditional trading partners.
- Continued globalization of production and consumption
- More liner services from Asia to the East Coast, to avoid West Coast congestion. (Panama Canal expansion)
- More short-sea shipping opportunities
- Vessels continue to get larger and deeper

List Other?

State and Regional Trends

- The value of Florida's total international trade exceeded a forecast for 2005 of \$78.3 billion by nearly \$20 billion.
- The value of waterborne cargo grew by 22.4% (compared with a 5.4% increase in airborne cargo) and reached 62.9 billion, more than 2/3s of the state's total international trade and is 3 years ahead of forecasts.
- Strained financial resources for infrastructure investment
- Escalating security costs
- Increasing policy focus on regional strategies for action
- Market diversification

List Other?

Statewide Tailwinds (Opportunities aiding Florida's seaports)

List

Regional Tailwinds (Opportunities aiding Florida's seaports)

List

Statewide Headwinds (Challenges potentially hindering Florida's seaports)

List

Regional Headwinds (Challenges potentially hindering Florida's seaports)

List

Southeast Region- Seaports Business Models Port of Palm Beach

Governing Body: Board of Port Commissioners (Port of Palm Beach District)

Description: The Port is a full-service, diversified landlord port that provides services through its private sector partners in South Florida and is responsible for facilitating economic development within Palm Beach County and the region. With its services include containerized, dry bulk, liquid bulk, break-bulk, and roll on/roll off cargo; and the provision of facilities and handling services to accommodate these cargoes. The Port is an important distribution center for commodities being shipped primarily throughout the Caribbean Basin. Additionally, the Port provides Foreign Trade Zone and intermodal opportunities to its customers and users. The Port offers day-cruising, passenger-ferry cruising, and multi-day port-of-call operations.

Mission: Provide quality deepwater facilities to serve the diverse maritime shipping, rail, intermodal and cruise markets, and facilitate economic development within Palm Beach County, the region and the state.

<i>Throughputs</i>	<i>Current (04-05)</i>	<i>Projects (09/10)</i>
Cargo Tons	4.2 million	5.3 million
Cargo (TEUs)	248,206	300,000
Cruise (revenue passengers)	553,692	750,000

Major goals and objectives

- Increase cargo throughput, with increased imports/exports between the Port and the Caribbean and Latin America regions.
- Increase cruise operations and passenger counts, and support related tourism
- Retain Port customers and assist in joint marketing efforts.
- Increase and enhance the Port's image in the community, state, regional and national economies.
- Implement the new Port Master Plan over the next five years.

Capital Improvements Needed to Achieve Port's Mission

• Redevelopment of slip 3	• Harbor and channel improvements
• South Gate access to SR 710 and US 1	• South Port Complex
• On-Port intermodal rail improvements	• Off-Port intermodal rail improvements
• Passenger cruise terminal and garages	• Cargo storage expansion
• Slip 2 extension	

Southeast Region- Seaports Business Models Port Everglades

Governing Body: Broward County Board of County Commissioners

Description: Port Everglades ranks as one of the nation’s leading container and cruise ports. The Port’s diversified cargo includes: bulk (gasoline and aviation fuel, cement and clinkers, petroleum/crude and fuel oils, gypsum); break-bulk (building materials, steel, lumber); container (tile, leather goods, coffee, paper products, auto parts, furniture, apparel, beverages, dairy products, agricultural products, frozen meats, citrus concentrates); rolling stock such as yachts and other boats, vehicles and equipment. The Port’s cruise operations encompass nearly 50 ships, whose itineraries range from one-day cruises to the Bahamas through 103 night world cruises. Other activities include a petroleum storage tank farm, serving 12 counties, Foreign Trade Zone #25, used by over 60 businesses and an annual “Fleet Week” honoring the U.S. seagoing services.

Mission: Through ongoing seaport activity, to create and promote commerce and industry within Broward County, the state and the nation; to contribute to the development of an integrated and balanced regional transportation system.

Throughputs	Current (04-05)	Projects (09/10)
Cargo Tons	26.5 million	29.0 million
Cargo (TEUs)	798,238	889,700
Cruise (revenue passengers)	3.8 million	3.8 million

Major goals and objectives

- Provide new container and other marine terminal/warehouse facilities, including planning for an intermodal container transfer facility
- Improve intermodal connections to facilitate the transportation of cargo and provide competitive service
- Expand cruise operations and construct new facilities
- Expand roadway systems and parking facilities to support increase cruise growth and on-site Convention Center
- Expand Foreign Trade Zone operations.
- Expand role as transshipment center for the SE U.S., Caribbean, Latin American and Far East markets
- Improve petroleum distribution facilities
- Pursue new trading opportunities and strengthen existing ties

Capital Improvements Needed to Achieve Port’s Mission

• Expansion of Southport terminal	• Additional cruise terminals, cargo facilities and cranes
• Better intermodal connections	• Harbor/maintenance dredging for deeper-draft cargo ships
• Permanent off-shore dredged material management site	• Additional upland dredged material management sites

Southeast Region- Seaports Business Models Port of Miami

Governing Body: Miami Dade Board of County Commissioners

Description: With record volumes of cargo and cruise passengers passing through the 518 acre island, the Port of Miami is among one of the worlds busiest ports. On the cargo side, the Port of Miami is proud to continue as the “Number One Container Port in Florida.” Cargo destined for more than 100 countries and 250 ports around the world flow through Miami. The port saw its TEUs surpass the one million mark for the third year in a row. On the cruise side, the Port of Miami continues to be the “Cruise Capital of the World”. It serves 15 homeporting ships, including six of the world’s megaships. The Port of Miami is one of the two main economic generators for the economy for Miami-Dade County. It has an economic impact of \$12 billion dollars and accounts for 98,000 jobs that are directly or indirectly related to port activities.

Mission: To be an economic generator for both Miami-Dade County and South Florida, projecting a positive world-class image for our local community. To ensure that the Port has the capabilities to provide both the cargo and cruise and cargo industries with the necessary infrastructure for continued growth well into the 21st century.”

Throughputs	Current (04-05)	Projects (09/10)
Cargo Tons	9.5 million	10.7 million
Cargo (TEUs)	1, 054,462	1.2 million
Cruise (revenue passengers)	3.6 million	4.5 million

Major goals and objectives

- Expand cruise market share by restoring existing facilities and constructing new terminals and berths required for new generation ships
- Expand container market share by providing cargo-handling and railroad facilities required for efficient inter modal container operations
- Enhance position as transshipment hub of the Caribbean and Central and South America
- Pursue new trade opportunities and strengthen exiting ties.

Capital Improvements Needed to Achieve Port’s Mission

• Security facilities	• Development of an on- or near-dock intermodal logistics transfer facility
• Direct Port-Interstate access via tunnel or bridge	• Cruise terminal and cargo berthing expansion
• Deeper and wider channel and turning basin	

Southeast Region- Seaports Business Models Port of Key West

Governing Body: City of Key West

Description: The Port consists of the cruise berths at the Outer Mole Pier, Mallory Dock and Pier B, as well as ferry activities at the Key West Bight Ferry Terminal. These facilities handle more multi-day cruise ship port of call passengers than any other port in the nation, and have one of the state’s strongest and most sustained passenger ferry operations. As the Port is exclusively a cruise ship and ferry passenger port, with no cargo activities and minimum ship provisioning, contributions to the local and regional economy are based primarily on revenue generated directly from tariffs and other fees, as well as passenger and crew spending. In addition to generating significant economic impacts at the local level, the Port of Key West supports cruise and ferry homeporting activities all over the state. Cruise vessels calling on Key West sail from Port Canaveral, Port Manatee, Port of Tampa, Port of Miami and Port Everglades. An estimated 10 percent of all cruise passengers departing from Florida call on Key West at some point in their cruise itinerary. In addition, ferry passengers call on Key West from Fort Myers and Marco Island homeports. By providing diversity to itineraries generating from locations throughout Florida, Key West supports passenger benefits realized on a statewide basis.

Mission: The City of Key West’s Port Operations Mission Statement is to focus on “providing residents and visitors with maritime, real estate services, and management of infrastructure to enhance the local economy, providing recreational opportunities for its citizens, and the same time protecting both our heritage and the marine environment for future generations.

Throughputs	Current (04-05)	Projects (09/10)
Cargo Tons	None	None
Cargo (TEUs)	None	None
Cruise (revenue passengers)	1.0 million	.93 million

Major goals and objectives

- Develop and maintain port-of-call facilities to accommodate the needs of the cruise ship industry and its passengers
- Link the physical, social and environmental aspects of the working waterfront to the community fabric
- Maximize the generation of benefits and revenues emanating from the cruise industry for the City and its tourist-related businesses.
- Manage cruise-related volumes to sustain the island’s quality of life, including its environmentally sensitive resources, public amenities, and public waterfront.
- Increase domestic ferry operations in the City of Key West as an alternative to land-based transportation.
- Maintain and improve Port security.

Capital Improvements Needed to Achieve Port’s Mission

<ul style="list-style-type: none"> • Incorporate the Truman Waterfront, a former U.S. Navy property, into the historic fabric of the City by means of improved access roads, berthing facilities, security improvement, and a harbor walk 	<ul style="list-style-type: none"> • Maintain and improve the City’s Mallory Dock cruise facility and Key West Bight ferry facility, including security improvements, infrastructure upgrades, and berthing improvements.
--	--

**SOUTHEAST REGION SEAPORTS
SHARED NEEDS AND CHARACTERISTICS
BASED ON SEAPORT BUSINESS AND MARKET DYNAMICS (DRAFT)**

A. Improve inter and intra regional freight mobility connectivity in transportation corridors. Support Economic Growth and Competitiveness of Domestic & International Trade through efficient transportation corridors-improved inter and intra regional freight mobility connectivity.

B. 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.

C. Competitive market assessment and port diversification. Ports are faced with significant challenges in sustaining growth and diversifying their business base.

D. Ports as regional economic engines. Retain and stimulate economic development & job growth- ports as economic engines of their regions, state and nation

E. Waterside navigation improvement that can accommodate dynamics of shipping market vessel changes in a timely manner

F. Address port user needs. Provide market sensitive facility and service costs to port users to retain and expand business opportunities

G. Promote regional cooperation to maximize use of resources. Create synergies to benefit both public and private sector freight interests throughout Florida

H. Encourage public-private partnerships that maximize financial resources and collaboration between ports, the state and the maritime industry

I. Ensure a safe, secure, sustainable and cost effective logistics chain as part of an intermodal transportation system for the transport of people and goods. Build a truly intermodal transportation system that provides seamless connections while ensuring a safe, secure, sustainable and cost effective logistics chain for transport of people and goods

List Others?

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

- 4. 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.**

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

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

List Others:

Planning Process Principles

- 3. 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, all modes of transportation (seaports, railroads, airports, highways, transit and space).**

- 4. 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.**

List Others:

Planning Assumptions *(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.**

Comments:

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

Comments:

- 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.**

Comments:

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

Comments:

- 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.**

Comments:

- 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.**

Comments:

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

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.).**

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.

Comments:

- 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.**

Comments:

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 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.