

Seaport Statewide Strategic Visioning and Planning Process

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

West Coast and Panhandle Regional Seaports Workshop August 4, 2006, Tampa, Florida, 10:00-3:30 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



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

**West Coast and Panhandle Regional Seaports Workshop
Seaport Statewide Strategic Visioning and Planning Process
August 4, 2006, in Tampa, Florida, 10:00-3:30 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

Facilitator’s Workshop Summary

TABLE OF CONTENTS

<i>Executive Summary</i>	3
I. Welcome, Introductions and Review of Agenda	6
II. Overview of the Proposed Seaports Business Model Action Planning Process and Framework	6
III. Context for Statewide and Regional Seaport Planning	7
IV. Partnership Roles	9
V. Trends, Headwinds and Tailwinds	10
VI. West Coast and Panhandle Regions Seaports Business and Market Dynamics- Shared Needs	13
A. Overview of the key components for business planning models for each of the regional ports	13
B. Identification and refinement of shared needs and characteristics of the seaport business planning models in the region.	17
VII. Guiding Principles for a Statewide and Regional Seaport Strategic Planning Process	23
VIII. Next Steps	26
 <i>Appendices</i>	
#1 Workshop Agenda	27
#2 Workshop Evaluation	29
#3 Workshop Participants	30
#4 Planning Assumptions- Workshop and Online Survey Responses	31
#5 Facilitation Team	35

West Coast and Panhandle Regional Seaports Workshop
Seaport Statewide Strategic Visioning and Planning Process
August 4, 2006, in Tampa, Florida, 10:00-3:30 PM

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

“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

EXECUTIVE SUMMARY

Florida Department of Transportation Secretary Denver Stutler, welcomed the participants to District 7, which hosted the workshop, and offered some perspectives on the importance of Florida’s deep water ports to the state’s future economic development. 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 a proposed sequence of regional and statewide meetings noting there would be an additional user workshop in Ft. Lauderdale on August 15 leading to a statewide summit on August 30-31, in Tampa.

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

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

- Updates on individual seaport master plans and the opportunity to work more closely and coordinate with FDOT Districts in these updates as well as clarify with FDCA and FDOT to interpretation of the port’s DRI exemption.
- The possibility of combining the bottom up and top down approach to developing a statewide ports strategic plan.

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

- The Florida Transportation Commission and their corridor initiative. Secretary Stutler noted that the Commission's focus is on financing new corridors through public/private partnerships while FDOT is looking at interconnectivity policies related to retrofitting existing corridors as well as reviewing transportation investments and their return with different modal partners.
- Metropolitan Planning Organizations and Ports involvement with them in regional planning, TRIP program opportunities, and freight policy issues.
- The Florida Department of Transportation-Headquarters- Intermodal Division and District Planning Offices in the continuing development of the Strategic Intermodal System.

Workshop participants reviewed and refined draft starter list of trends, headwinds and tailwinds. Global and National trends identified included anticipated expansion of the Panama Canal, increasing consolidation and costs of rail and truck transportation, growing use of "just in time" inventory systems, off short drilling impacts on seaports. Regional trends included the new corridors initiative, increase in aggregate shipping and impact on rail, push for deeper channels to accommodate larger ships

Opportunities for Seaports statewide and regionally that participants identified included: container trade growth, growing demands for ports on the west coast based on development and establishing collaboratively with Florida's ports different market opportunities for each port in different regions.

Challenges for seaports statewide and regionally that participants identified included: permit timing and funding for dredging to accommodate larger ships; maintaining local truck routes in terms of port access; and security costs.

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

1. **Improve inter- and intra-regional freight and passenger mobility connectivity in transportation corridors.** (*Regional Importance Ranking= 4.6,*)
2. **Support waterside navigation improvement that can accommodate dynamics of shipping market vessel changes in a timely manner.** (*Regional Importance Ranking = 4.6*)
3. **Ensure a safe, secure, sustainable and cost effective logistics chain as part of a truly intermodal transportation system for the transport of people and goods through seamless connections while ensuring a safe, secure, sustainable and cost effective logistics chain for transport of people and goods.** (*Regional Importance Ranking = 4.6*)
4. **Address port user needs. Provide market sensitive facility and service costs to port users to retain and expand business opportunities.** (*Regional Importance Ranking = 4.6*)
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.** (*Regional Importance Ranking = 4.5*)

6. **Improve throughput of cargo on port at landside terminal and cargo handling systems. Port capacity improvements to enhance throughput of cargo on port at landside terminal and cargo handling system upgrades.** (*Regional Importance Ranking = 4.4*)
7. **Encourage public-private partnerships that maximize financial resources and collaboration between ports, the state and the private sector industry, local government and communities.** (*Regional Importance Ranking = 3.9*)
8. **Promote regional cooperation to maximize use of resources and create synergies to benefit both public and private sector freight and passenger interests throughout Florida.** (*Regional Importance Ranking = 3.8*)
9. **Promote competitive market assessment, port diversification and rationalization regarding highest and best use. Ports are faced with significant challenges in sustaining growth and diversifying their business base.** (*Regional Importance Ranking = 3.2*)

Participants then reviewed, refined and ranked their level of agreement (*from 5=Strongly Agree to 1=Disagree*) of a draft starter list of guiding principles that could inform the development of the seaports strategic plan. All of the principles received an average agreement ranking of 4.0 or higher.

Substantive Planning Principles

1. In order to strengthen the state's overall network of seaports that handle varied commodities and serving different trade lanes and passenger/cruise service, the Florida seaport strategic plan should reflect the input of the state's 14 deepwater seaports and the demands of the Florida seaport business model. (*Regional Agreement Ranking= 4.6*)
2. To sustain a Florida seaport system as a competitive international trade network that fosters economic development, constant market vigilance and investment flexibility will be required. (*Regional Agreement Ranking= 4.8*)
3. The Florida seaports must find and build into the strategic plan the appropriate balances commerce, global competition and mobility with security. (*Regional Agreement Ranking= 4.3*)
4. The Florida seaports must find and build into the strategic plan the appropriate balance between mobility and the seaport impacts on the environment and community. (*Regional Agreement Ranking= 4.5*)

Planning Process Principles

1. The development of the seaport strategic plan should be a collaborative effort directly involving and engaging the state's 14 deep water ports and all levels of government, private sector users and owners of Florida's trade and transport system, both cargo and passenger interests and all modes of transportation. (*Regional Agreement Ranking= 4.2*)
2. The Seaports and their partners should engage in a process to build understanding and consensus on the needs, policies and strategies to ensure Florida's competitiveness in the global market. (*Regional Agreement Ranking= 4.5*)

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

**West Coast and Panhandle Regional Seaports Workshop
Seaport Statewide Strategic Visioning and Planning Process
August 4, 2006, in Tampa, Florida, 10:00-3:30 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

Facilitator’s Workshop Summary

I. Welcome, Introductions and Review of Agenda

Florida Department of Transportation Secretary Denver Stutler, welcomed the participants to District 7, which hosted the workshop, and offered some perspectives on the importance of Florida’s deep water ports to the state’s future economic development, the need to thinking more strategically about the efforts to enhance connectivity of ports to the regional and statewide transportation system.

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 would be an additional user workshop in Ft. Lauderdale on August 15 leading to a statewide summit on August 30-31, in Tampa.

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

A. Seaport Master Plans (9J5)

Port Director Comments:

- Tampa- in process to developing/updating master/strategic plan. To be completed by early 07. Combined master and strategic effort.
- Manatee- last plan '03. Building out under current plan in '07. Will be engaging in updating the master plan- looking both off shore as well as on port and inland distribution. Port Authority reviewing process for the update and hope to be updating by Fall 06.
- Port St. Petersburg- master plan- somewhat dated but still helpful, viable as a niche port- using port as a technology center with USF, small cruise ship facility. Master plan also discussed potential opportunity for mega yachts. Depth about 21 feet.
- Port St. Joe- now writing a new port master plan- responding to new changes in term of land development and option agreement on 130 acres of property. Went from industrial to destination town.

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

Workshop Participant Comments

- Freight advisory committees being formed.

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

West Coast and Panhandle Ports- Workshop Comments

- State DOT Freight Study/Planning.
- Dynamic state freight planning processes developed at DOT over last several years- moved from clearinghouse to policy identification with various partners and looking at issues from statewide perspective. Macro economic analysis-return on investment studies. Now have data to analyze seaport contributions. Cambridge Systematics July report. Global trade issues and inland ports are part of freight planning efforts. Strategic planning process- conditions report.
- Coordinating with FHWA/ ASHTO- freight studies and policy development.

J. South Florida Regional Transportation Authority

K. Airport Master/Strategic Plans

West Coast and Panhandle Ports- Workshop Comments

- Master planning was always done from the bottom up and sent up to DOT for approval. It is probably important to do at least every 5 years. Concern about the strategic plan is that it may be top down? Combine the approach- seek greater involvement of DOT Districts in the master planning process?
- DCA is reinterpreting the DRI exemption under the new 360 law and this is a source of concern in terms of Florida port competitiveness? Requiring more detail presenting problems in terms of flexibility and responsiveness to users. Suggest Ports sit down with DCA and DOT to review interpretation. DOT can help facilitate that. New category for land use may need to be created? Consider use of enterprise zones categories?
- Where, if at all, within the Strategic plan should port master plan be addressed?
- Strategic planning effort not intended to replace but complement as an umbrella effort statewide and regionally.

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**
- **Florida Transportation Commission**
 - West Coast and Panhandle Ports- Workshop Comments*
 - Corridor initiative- charrette- (August 14-15 in Tampa) focused on new corridors and financing through public/private partnerships
 - FDOT looking at policies around retrofitting existing corridors. Not trying to identify interchanges (which is essentially a growth management regional issue) but focusing on inter connectivity.
 - Florida “gives all the free \$\$ to roads.” Need to look more closely and differently about transportation investments and their return.
- **Metropolitan Planning Organizations**
 - West Coast and Panhandle Ports- Workshop Comments*
 - Ports Involvement with MPOs? Experiences being part of the MPO Boards? Help of DOT on a statewide level to convene a conversation with MPO and Ports see how ports can better tap into some of the funds? E.g. the criteria for funding (e.g. of 20 only 2 deal with Ports/freights etc.). Little return for the effort. Overall purpose and direction of MPOs needs to shift? Model of Sarasota/Manatee MPO good work with Manatee Port.
 - Get each of the MPOs to establish a goods/freight planning process and issues and devote staff to that. Get an advisory committee on freight and report directly to Board. “Commuters vote, trucks/ships don’t.”
 - Key relationship with each port and statewide- considered and addressed at strategic level?
 - TRIP program- MPO regional projects- opportunity to work with MPOs? Most have put highway for TRIP projects. Work with guidance on how to invest in non-highway projects.
 - Movement to do better regional planning and dialogue with the corresponding scarcity of funds. Fight and intensity will only grow.
 - Regional prioritization- is a new and developing area. Freight issue- education issue is most important aspect. Freight management strategy needs to be addressed at the regional level.
 - How can we get our MPOs and Ports linked into a regional strategic framework?
- **Regional Planning Councils**
- **Florida Seaport Tenant/User Stakeholders.**
- **The Florida Department of Transportation-Headquarters-** Inter-modal Division and Planning

- District Offices
- **Florida Ocean Alliance**
West Coast and Panhandle Ports- Workshop Comments
 - Bring “Right Whale” issue raised in the Northeast workshop to the Ocean Alliance
- **Local Government**
- **Other?**
West Coast and Panhandle Ports- Workshop Comments
 - Security issues another regional issue with federal.

V. Trends, Headwinds and Tailwinds

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

A. Trends Affecting Ports

1. Global and National Trends

West Coast and Panhandle Ports- Online Survey Responses

- Shifting trade routes: impact of all-water shipments through the Suez Canal or the Panama Canal
- Anticipated expansion of the Panama Canal (subject to a referendum later in the year)
- Shortages of materials as other nations pursue their own development opportunities
- Vessel size - cargo and cruise
- Expanding free trade area - increased trade opportunities
- Increased cost of rail and road transportation - one factor - benefit - short sea shipping; Mexico service; and direct service from main global trade lanes
- Expansion of Asia and SA/LA trade
- West coast congestion and cost - opportunities for FL ports
- U.S. construction and manufacturing industry relying heavily on imported commodities, placing heavy demand on ports for service.
- Continuing imbalance between imports and exports
- Normalized US/Cuba relations and trade

West Coast and Panhandle Ports- Workshop Comments

- USDOT’s Secretary’s National Advisory Council- What is happening with the Panama Canal? There will be a referendum for building a new canal. Implications for Florida’s ports down the road- 10-15 years out.
- “Just in time” sourcing approach.
- Move of manufacturers to get closer to ports and coastal areas.
- Competition and price of the land is driving commercial uses away from Ports.
- Off shore oil drilling- impacts on seaports?
- Cuba is going to be drilling. E.g. of impacts of oil exploration in the 70s on the Manatee Port. Supply to rigs etc. This will impact west coast planning effort.
- Consolidation of rail industry and impacts on rates.

2. State and Regional Trends

West Coast and Panhandle Ports- Online Survey Responses

- More distribution centers located in the State
- Security regulations burden and expense
- From a cruise perspective, more cruise ports closer to varied markets
- Fuel costs
- Increasing cost of materials
- Security capital and operating costs continue to erode the available net assets available for expansion and maintenance of existing facilities. Finally, construction material costs have risen dramatically over the past 2-3 years, often increasing the cost of similar size facilities by 50-75%.
- Significant investment in regional load centers/hub ports - increased opportunities for larger vessel / feeder services
- Inability of port infrastructure to keep up with continued global trade expansion
- Increased competition regionally (US) and globally
- With average channel and berth drafts of 40 feet, and the time required to obtain permitting, design, a contractor and funding, it will be difficult to modify and deepen channels and berths to accommodate larger vessels in the next 3-5 years.
- Additionally, the ability to accommodate the amount of containers being imported over the next decade will be difficult to adjust to with current funding capabilities.
- Labor shortages
- Local focus of many elected officials
- Lack of understanding by some public and private sector interests as to what seaports do, why they are important, and why we should invest in them
- Land use compatibility; availability and growth management concerns
- Increased dependence on ports to support (related cargo movement) the construction and expansion of state infrastructure - roadway, housing etc.
- Economic and population growth - burden on ports
- Burgeoning population is creating overcrowded roads, obstructing port access and freight movement.
- Primarily funding for capital infrastructure necessary to meet the ever expanding needs of our customers.

West Coast and Panhandle Ports- Workshop Comments

- Add Secretary's regional examples and new corridors initiative
- Follows Port of Palm Beach's e.g. of a corridor and inland port concept.
- Issues of aggregate companies in South Florida. Importing increase in aggregates. Big implication on rail. Come in off shore and into ports. CSX looking at longer trains (110 cars long) grade separation issues.
- Feed stocks are going to come into the ports.
- As domestic supply of aggregates or phosphates gets in shorter supply, will bring ships that will need deeper channels. Transporting cargo from the port to where it needs to go.
- Florida is becoming more of a consumer state- have to have a vision of the importance and role of seaports to meet the needs.

B. Tailwinds (Opportunities aiding Florida's seaports)

1. Statewide

West Coast and Panhandle Ports- Online Survey Responses

- Growing local populations increase the need for consumer goods and construction materials imported from various markets -- domestic and international
- Strong demand for port services of all kinds (containerized cargo, break bulk cargo, bulk cargo)
- Seaports investment - reduces impact on highways and congestion
- Seaports investment - helps importers/exporters and consumers
- Population and consumption growth
- Ports, working together through the Florida Ports Council, provide an opportunity to organize strategies for international, national, and state-wide commerce. It also provides an invaluable opportunity to reach our state leaders and develop the recognition of the impact that our seaports have, not only in local and regional economies but on the national level as well.
- Port infrastructure funding through joint FPC and FDOT bonds and loan programs are, we believe, a distinct and measurable by-product of this recognition.

West Coast and Panhandle Ports- Workshop Comments

- Challenge of establishing priorities among the different opportunities for ports. Which markets and opportunities that can best serve communities, then linked to funding.
- Panhandle- handling more and stronger demand regarding development and growth in region. Need for new gateways into the SE markets. Headwind- we are constrained by land availability. Looking for converting industry to port facility.
- Huge case that investment in seaports to deal with and reduce highway congestion. Will continue for next 10 years.
- Growing opportunities for more direct vessel to port opportunities. Truckers are challenged for long haul.
- US vessels vs. foreign flagged vessels and ability to bring cargo in (Jones Act changes?)

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

West Coast and Panhandle Ports- Online Survey Responses

- Container trade is growing in Tampa and Panama City. Emerging bio energy industry has interest in utilizing Florida's Gulf Ports.
- Reliability of port systems - following a major hurricane
- Alternate strategic regional facilities (petroleum storage yard - inland)
- Our Port has benefited greatly from the support of the local community, which encourages public/private partnerships. We have worked with our customers as a team to develop strategic solutions to meet their market driven demands. Often times these opportunities have a limited window of opportunity. Our Economic Development Council, Chamber of Commerce and local Board of County Commissioners have developed a working alliance that expedites the permitting and planning process resulting in much faster design/permit phase.

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

1. Statewide Challenges

West Coast and Panhandle Ports- Online Survey Responses

- Traffic congestion
- Land constraints impeding expansion
- Competing uses for waterfront land
- Shortages and escalating costs of materials and labor
- Hurricanes and other emergencies
- Security Costs are higher than necessary. New insurance rates will impact the Ports' operating results.
- Sufficient land to accommodate growth in cargo
- Truck route system - ability to protect the system from growth
- Increased cost of infrastructure - challenge and problem
- Ability to create deeper and wider channels
- Alternate home ports for cruise ships in the Caribbean and worldwide
- Operating cost of all types continually strain the available resources that can be used for expansion and to maintain a competitive edge. (e.g. Interest costs, general liability and health insurance, electric and fuel have outpaced the composite inflation rate). As most budgets have been contained over the past few years the options for a balanced budget can be limited to revenue expansion. However, without the ability to expand infrastructure, assuming the Port is operating near capacity, this option is contained also.
- Annual security operating costs of personnel, training, and procedural changes necessary to meet the consistently changing security regulations consume a larger share of the operating budget.

West Coast and Panhandle Ports- Workshop Comments

- Water draft accommodating larger ships- big stumbling block. Not funding dredging appropriately. Bottle neck-
- Army Corp dredging efforts take decades
- Port access vs. truck route ordinances. Nuisance ordinances. All state routes are truck routes. Access- local routes becoming truck prohibited routes?
- Security issues, costs times.

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

West Coast and Panhandle Ports- Online Survey Responses

- The Panhandle ports are constrained by lack of developable land.
- Escalation of value of waterfront property
- Increasing difficult for ports to acquire and expand
- Competing land uses
- One of the biggest challenges we face to the waterside expansion of berths and harbor dredging is in striking an acceptable balance with the environment. Local and statewide environmental regulations can be difficult or impossible to implement financially.

West Coast and Panhandle Ports- Workshop Comments

- For Tampa the bridge is a constraint in terms of the size of cruise ships. Also limited to low profile cranes due to proximity to aircraft at small airport.

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:

West Coast & Panhandle- Seaports Business Models- Port Manatee

Governing Body: Manatee County Port Authority

Description: Located at the entrance to Tampa bay, the Port is among Florida's largest deepwater seaports. The Port services a variety of break-bulk cargo commodities, led by imports of perishables, forest products, steel and ferrous and non-ferrous metals. Bulk commodities include finished phosphate products, refined petroleum, cement, cement clinkers, and a growing array of construction-grad aggregates. More than \$119 million in new berthing and warehouse space, along with a comprehensive maintenance and expansion-dredging program, are under way or recently completed at the Port.

Director Comments on the Business Model

- Public private partnerships very important for Port Manatee for warehousing.
- Growing rapidly. Not in cruise business now. (had business up to 2001).
- 40 feet. Allows for Panamex size vessels with rock and aggregate, concrete
- The users are investing own dollars into port facilities. Longer term lease agreements as an incentive.
- Direct connect to I 75- under study by District.
- 10,000 new homes have been approved. Planning effort needs to be way out front. FDOT is to be commended for its planning initiative.
- Anticipate growth in cargo- in next couple years-13.5 million from 10 million now. Moving lots of energy products. Greatest capacity for cold storage on the Gulf.

West Coast & Panhandle- Seaports Business Models- Port Panama City

Governing Body: Panama City Port Authority

Description: Port Panama City provides modern seaport facilities for a variety of break-bulk and bulk cargoes including forest products, steel, non-ferrous metals, bagged products, aggregates, and molasses. The Port's location is attractive to shippers serving North Florida, Georgia and Alabama. Facilities include six berths, 350,000 square feet of warehouse space, six acres of paved cargo-handling area, and a new 36-foot deep channel. The Port is also home to two important manufacturing plants – Berg Steel Pipe and Oceaneering International. The Port exports pulp, paper, steel pipe, bulk clay and project cargoes; and imports copper, steel plate, steel coils, molasses, aggregates, feeds and fertilizers.

Director Comments on the Business Model

- Looking to almost double cargo tons in one year.
- Container trade (4 to 5 small ships)- after Katrina.
- Trade with Mexico will continue to grow.

- Convert non-essential users to cargo uses- gaining space for cargo activity. Expanding bulk handling capability.
- Providing for local and regional economic development.
- 200 acre industrial park for industry using the port.

West Coast & Panhandle- Seaports Business Models--Port of Pensacola

Governing Body: City of Pensacola

Description: This Northwest Florida Port, capitalizing on its Gulf of Mexico access and rail proximity, has been successfully diversifying its cargo mix to provide new business opportunities. Additionally, the Port has begun a diversification of revenue streams by leasing available warehouse space to industrial use customers that fit within the Port's business profile as a landlord port. The Port's cargo includes exports of frozen food, bagged food products, both electric and wind power generation equipment, off-shore exploration supplies and materials and military equipment; and imports of forest products, aggregate, asphalt, paper products, construction materials, cement, and both electric and wind power generation equipment.

The Port's primary operating objectives are to maximize revenues and maintain financial stability, while serving as a catalyst for the creation and retention of jobs. The Port achieves these objectives by facilitating international trade, improving facilities and services, attracting both cargo and non-cargo activities, and planning for improvements in facilities and infrastructure. In carrying out its activities, the Port balances these ideals with the sensitivities it faces as an industrial/commercial complex located in the midst of thriving downtown retail, residential and historic areas.

(Director unable to attend)

West Coast & Panhandle- Seaports Business Models--Port of Port St. Joe

Governing Body: Port St. Joe Port Authority

Description: The Port of Port St. Joe, a once thriving Gulf port that has been inactive for many years, has been engaged in a revitalization effort that will develop it into an employment center and a hub of economic activity and commerce. A significant step in this effort was recently accomplished with an option agreement to purchase two parcels of property in excess of 100 acres, adjoining existing Port-owned property, on which the new Port of Port St. Joe will be developed. To initiate development, the Port will focus its planning efforts on the first of these parcels, which fronts on the Intracoastal Waterway. This effort to revitalize the Port is of great importance to the citizens of the community and the Port Authority is proceeding diligently to accomplish the task, initiating a Port Master Plan Update to reflect its new development opportunities.

Director Comments on the Business Model

- Undergoing changes to revitalize- redoing master plan accordingly.
- Limited initially for space because of bridge.
- Dredging funds- not the issue it is in some places- clean sand. Permitting and timing the issue
- Port of Panama/Port St. Joe- operating in a partnership for regional.
- Growth is a headwind and tailwind.

West Coast & Panhandle- Seaports Business Models--Port of St. Petersburg

Governing Body: City of St. Petersburg

Description: The Port of St. Petersburg, located on Tampa Bay, is exploring opportunities to create a multi-use facility that capitalizes on its unique assets within the City of St. Petersburg. These include opportunities to attract small cruise ships and other vessels.

Director Comments on the Business Model

- Depth of Port is limited- dredging probably not in the cards.
- Multi-use facility- technology R &D facility
- Mega yacht facility not of interest to city.
- Small cruise operation.

West Coast & Panhandle- Seaports Business Models--Port of Tampa

Governing Body: Tampa Port Authority

Description: The Port of Tampa is the largest of the Florida ports, as measured by tonnage, and the major economic engine in West Central Florida. A major port of entry for the fuel and building materials used in the region and a force in the shipbuilding and repair industry, the Port is also a popular cruise port, serving the expanding Western Caribbean market. Reflecting the Port's traditional ties with the nearby phosphate industry, the Port's predominant bulk cargoes include phosphate rock and fertilizer products as well as petroleum and coal. The Port is diversifying its cargo mix to take advantage of Florida's growing ties with Mexico and other countries in Central America and has developed a container-handling infrastructure. In addition to the traditional liquid and dry bulk cargoes, the Port handles many other commodities, exporting automobiles, citrus pellets, and scrap steel; and importing limestone, ammonia, sulphur, cement, steel, rock, fruit, construction material and refrigerated products.

Having collaborate with the City of Tampa to create a new tourist destination in the waterfront district called Channelside, the Port has attracted several additional cruise lines in recent years and will continue to market Tampa as a divers an unique destination, paving the way for future cruise industry success.

Director Comments on the Business Model

- We see opportunities for tremendous growth in the future. Could add 10 million tons but have had to work to put brakes on our marketing efforts while we get the strategic plan in order.
- Demands for cement and aggregate- want greater diversification than phosphate, fuel and concrete.
- Want to facilitate better coordination and partnership with CSX and Mosaic Fertilizer.
- Get bin channel from 34 to 40 feet. TECO not in agreement
- Increased trade with China. Weekly service- first port of call in gulf.
- 2 global operators at Tampa now. More to come. E.g. Mersk as potential users. Container activity is a focus for growth. Truck is how they will move. Market is

within couple hundred miles of Tampa. 12,000 truck moves a day growing to 17,000 truck moves a day in a couple years.

- Inland distribution points is an important element of the system.

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 based on seaport business models in the West Coast and Panhandle regions 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 points of the workshop 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.

Critically Important Less Important Avg.

Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	5	4	1	0	0	4.4
West Coast and Panhandle Survey Responses (8-2)	2	2	0	0	0	4.5
West Coast/Panhandle 8-4 Survey Written Responses	8	4	0	0	0	4.7

West Coast and Panhandle Ports-Online Survey Comments

- 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.

West Coast and Panhandle Ports-Workshop Survey Comments

- Must keep up with Port infrastructure- as part of 3 elements below. Critical but less than port focus area of direct port control.
- Safe and efficient transport- where possible separate cargo from people. Rail road not able to handle general cargo due to old fashion and inefficient equipment.

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

Critically Important Less Important Avg.

Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	3	7	0	0	0	4.3
West Coast and Panhandle Survey Responses (8-2)	1	3	0	0	0	4.2
West Coast/Panhandle 8-4 Survey Written Responses	7	4	2	0	0	4.4

West Coast and Panhandle Ports-Online Survey Comments

- Important not only to increase capacity, but competitiveness.

West Coast and Panhandle Ports-Workshop Written Survey Responses

- Throughput improvements critical because demand will exceed capacity. On port yes but water/port/inland.
- Need improvements on the people side. Port workers. Do not have any option for formal training.
- Must preserve truck routes to transit from Tampa Port into central Florida industry zone.
- Port Joe must create the landside systems in order to create capacity.
- Technology systems that improve turn times for trucks and rail to improve efficiency of ports/terminals.
- Security has become the “wild card” putting Florida ports at a thru-put disadvantage with ports in other states.

West Coast and Panhandle Ports- Workshop Discussion Comments

- Recognition of ports as hubs on the SIS- hub to hub connection recognized.
- County controls local truck route plans and designation- every 3 years. Development along truck routes leads to elimination of truck routes. Maintenance of truck route system.
- Little input to that before it happens, typically.

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>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	0	5	5	0	1	3.3
West Coast and Panhandle Survey Responses (8-2)	0	2	1	0	1	3.0
West Coast/Panhandle 8-4 Survey Written Responses	1	3	8	1	0	3.3

West Coast and Panhandle 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.
- With international trade increasing, diversification is not the problem, terminal and infrastructure capacity and constraints are.

West Coast and Panhandle Ports-Workshop Survey Comments

- Selecting for greatest ROI- diversification vital in ports. Ports working together on market shares as part of rationalization.

West Coast and Panhandle Ports- Workshop Discussion Comments

- Lot of demand for capacity and service. Moving out of the past era into a new era of rationalizing markets?
- Need to be careful about how to read these results. Which of these is most important in terms of planning looking ahead. Don't need as much focus because we are already down the way there. We have moved to diversify. Now need help in other areas.
- Fundamental differences between Florida ports and other ports in the country.
- Not as concerned about competition because the demand is so strong.

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

	<i>Critically Important</i>			<i>Less Important Avg.</i>		
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	8	2	1	0	0	4.6
West Coast and Panhandle Survey Responses (8-2)	2	1	1	0	0	4.2
West Coast/Panhandle 8-4 Survey Written Responses	7	6	0	0	0	4.5

West Coast and Panhandle 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.

West Coast and Panhandle Ports- Workshop Comments

- This is the heart of the mission statement for every port in Florida.
- Education is critical- this may be done regionally, e.g. Tampa as the “Rodney Dangerfield” of Florida. “Humblest port” in the state. Public perceptions that Miami and Everglades are larger in all ways than Tampa are widespread.
- Education needed that Ports are economic engine. Rail is the “spark plug” in the system.
- Economic benefits-need not only to educate our communities but also our state government, so they don't lose track of importance. In strategic planning danger of looking at markers (e.g., TEUs) that don't tell the whole story. 1-6 ratio of return on investment may hold up beyond TEUs.
- E.g. Port Fest for community to learn more about the Ports.

West Coast and Panhandle Ports-Workshop Written Survey Responses

- It's a local story that constantly needs to be told
- Public awareness is always a positive
- Economic development for our community/region is the reason for our existence.
- Key to educate state and local governments to fund and promote the port. The average citizen doesn't understand how freight actually moves into the community.

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

	<i>Critically Important</i>			<i>Less Important Avg.</i>		
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	4	4	2	0	0	4.2
West Coast and Panhandle Survey Responses (8-2)	2	1	1	0	0	4.5
West Coast/Panhandle 8-4 Survey Written Responses	10	3	0	0	0	4.8

West Coast and Panhandle Ports-Online Survey Comments

- If Florida's seaports cannot accommodate the newer deeper-draft cargo vessels because their channels are not deep enough or wide enough, they will lose market opportunities and play a less strategic role in international trade. This would be a step backward, as the ports are starting to see their trade with China and other Far East countries expand dramatically.

West Coast and Panhandle Ports-Workshop Written Survey Responses

- Improve pilots performance to better utilize exiting waterways. Do away with Jones Act! Look at North Europe.
- Federal funding/processing of port’s channels/harbor to meet increasing vessel size/drafts entrance to ports and one of 3 throughout element previously mentioned.
- Boats are only getting larger.. we must eliminate constraints to access markets.
- We have to be able to get the ships to the dock to succeed in port/terminal growth.
- Not only maintenance of existing facilities, but new dredging and places to put the dredge material. Need to expedite the permitting process.

West Coast and Panhandle Ports- Workshop Discussion Comments

- Not just important for maintenance, but as growth comes, new docks, removals of material to open new facility. Harder to find places to put material. Disposal sites are fewer these days. What can be done with this. Harder to do spoil islands. Going off shore- must go more than 50 miles. This needs to be addressed.
- Funding and timing issues. Timing is often the most important challenge.
- How can the state or the regions step up to help on dredging. Used to be mostly maintenance dredging. Now talking about a different dredging- more of a capital investment.
- Joint spoil locations developed regionally? Needs to be as close as possible to handle the costs.
- Sparkman is independent of the Corps. Need to go back in to WRDA and put right language so it will be a federal channel to maintain.
- Some success in Maryland- areas for disposal of dredge materials. Beneficial uses of dredge material.

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 Average (8-2)	6	5	0	0	0	4.5
West Coast and Panhandle Survey Responses (8-2)	3	1	0	0	0	4.8
West Coast/Panhandle 8-4 Survey Written Responses	7	6	0	0	0	4.8

West Coast and Panhandle Ports-Online Survey Comments

- Competing on service is the best way to attract and retain customers.

West Coast and Panhandle Ports-Workshop Written Survey Responses

- Customers are the key to ports growth and opportunities. Facilities and services keep customers.
- Provide costly facilities at competitive prices.

West Coast and Panhandle Ports- Workshop Comments

- This is a given.
- Ports have to provide expensive facilities at “competitive rates”
- Have to link transportation providers to the port. Service not just the port but the network to get to the port.

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.

Critically Important Less Important Avg.

Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	2	6	1	1	0	3.9
West Coast and Panhandle Survey Responses (8-2)	1	2	1	0	0	4.0
West Coast/Panhandle 8-4 Survey Written Responses	1	9	2	1	0	3.8

West Coast and Panhandle 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.

West Coast and Panhandle Ports-Workshop Written Survey Responses

- Needed.
- Given the growth rate of Florida this will prove to be more and more important!

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

Critically Important Less Important Avg.

Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey	5	4	3	2	1	
--	----------	----------	----------	----------	----------	--

http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	3	5	2	0	1	3.8
West Coast and Panhandle Survey Responses (8-2)	0	3	0	0	1	3.2
West Coast/Panhandle 8-4 Survey Written Responses	5	5	2	1	0	4.1

West Coast and Panhandle 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.

West Coast and Panhandle Ports-Workshop Survey Responses

- Amen.
- Excellent option to expedite results.

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>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	6	3	1	0	0	4.5
West Coast and Panhandle Survey Responses (8-2)	3	1	0	0	0	4.8
West Coast/Panhandle 8-4 Survey Written Responses	9	3	1	0	0	4.6

West Coast and Panhandle Ports-Online Survey Comments

- This is absolutely needed to fulfill the mission of Florida's seaports.
- Obviously

West Coast and Panhandle Ports- Workshop Comments

- Add “efficient” timely
- Ports addressing these on Port. Challenge ahead on “seamlessness” is the off port connectivity issues (e.g. grade crossing).
- Covering several issues all at once? Break this down. Safe and secure. Sustainable and cost effective. Seamlessness.

West Coast and Panhandle Ports-Workshop Written Survey Responses

- Interface of previous 3 elements of throughput.
- Not an issue depending on the location of the port.

10. Other shared needs that should be considered:

West Coast and Panhandle Online Survey Responses

- A larger dedicated revenue stream that the seaports can rely on.
- Greater ability to prioritize and decide what projects need to be built to improve mobility.
- Equal access to federal, state, and local funds with the other modes.

- It is important that individual Florida ports take advantage of the Florida Ports Council to build consensus for public policy initiatives and maintain unity within the Florida Ports.

West Coast and Panhandle Ports- Workshop Comments

- Security is not going away- FDLE did annual audit in Tampa. E.g. guards, access control, etc. Security costs going up 27% this year because of FDLE
- 311.12 Threat assessment- FEMA standards in the new law with infrastructure requirements could cost millions.
- Need to think about how this can be addressed statewide.

West Coast and Panhandle Ports-Workshop Survey Responses

- State funding support of seaports should be increased to reflect the benefit and importance of ports and the ROI to the state.

VII. Guiding principles for a Statewide and Regional Seaport Strategic Planning Process

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

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

Substantive Principles

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

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	6	5	0	0	0	4.5
West Coast and Panhandle Survey Responses (8-2)	4	0	0	0	0	5.0
West Coast/Panhandle 8-4 Survey Written Responses	7	5	1	0	0	4.5

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

Strongly Agree *Disagree* *Avg.*

Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	7	3	0	0	0	4.7
West Coast and Panhandle Survey Responses (8-2)	4	0	0	0	0	5.0
West Coast/Panhandle 8-4 Survey Written Responses	10	3	0	0	0	4.8

West Coast and Panhandle Ports-Online Survey Comments

- Out-of-state and off-shore seaports are always looking to capture trade routes and liner service that could flow to Florida's major container ports. For the bulk ports as well, changing markets and new customer demands dictate vigilance and flexibility. The private sector has a different time frame than the public sector and the seaports -- public sector entities that must function as businesses -- must turn on a dime to meet customer demand.

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

	<i>Critically Important</i>					<i>Less Important Avg..</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	6	3	1	0	0	4.4
West Coast and Panhandle Survey Responses (8-2)	5	5	1	0	0	4.5
West Coast/Panhandle 8-4 Survey Written Responses	5	6	2	0	0	3.8

West Coast and Panhandle Ports-Online Survey Comments

- The balance is between commerce and security, rather than among the four factors listed. Too stringent or inefficient security impedes the flow of commerce. I see the rest not as a balance, but a chain: the seaports require mobility, among other things, to compete successfully in global markets, thereby engendering commerce.
- I think you can balance commerce, mobility (transportation projects), and security. I do not know how you balance global competition.

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

	<i>Strongly Agree</i>					<i>Disagree Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	6	3	1	0	0	4.7
West Coast and Panhandle Survey Responses (8-2)	9	1	1	0	0	4.8
West Coast/Panhandle 8-4 Survey Written Responses	6	6	1	0	0	4.4

West Coast and Panhandle Ports-Online Survey Comments

- The seaports see themselves as stewards of the environment, and federal and state requirements provide the structure for the seaports to achieve the proper balance through permitting negotiations. The issue is when agency representatives or private interests forget

that building a seaport is not like building a dock for one's private boat and try to prevent the construction of what a seaport needs to generate jobs and economic benefits for the community.

Planning Process Principles

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

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	5	3	2	0	1	4.0
West Coast and Panhandle Survey Responses (8-2)	2	0	2	0	0	4.0
West Coast/Panhandle 8-4 Survey Written Responses	7	3	2	1	0	4.2

West Coast and Panhandle Ports-Online Survey Comments

- Maritime stakeholders are critical to seaport development and their collaboration and input are important to get their buy-in to the plan; but those who manage and operate seaports have the best understanding of what it takes to have a successful enterprise and they should have the predominant role in developing a seaport strategic plan.
- I think the Federal Govt. has very little involvement in this kind of planning (outside of dredging projects). I am also skeptical about the private sector's ability to offer a consistent point of view, beyond verifying the need for service.

West Coast and Panhandle Ports- Workshop Comments

- Concern with this get watered down with too many there. Danger of losing focus.
- Hard to involve federal input on statewide strategic ports issues. Not sure how this is accomplished.

West Coast and Panhandle Ports-Workshop Survey Responses

- Too many at the table may tend to “water down” the plan to where its no longer effective.

- 2. The Seaports and their partners should engage in a process to build understanding and consensus on the needs, policies and strategies to ensure Florida’s competitiveness in the global market.**

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

West Coast and Panhandle Survey Responses (8-2)	4	0	0	0	0	5.0
West Coast/Panhandle 8-4 Survey Written Responses	7	4	1	1	0	4.3

West Coast and Panhandle Ports-Online Survey Comments

- Consensus is a good thing. It is especially good if it brings more dollars for seaport development.

West Coast and Panhandle Ports-Workshop Survey Responses

- On going dialogue.

VIII. Next Steps

Mr. Towsley thanked the participants for their participation and input. He suggested that their involvement spoke of their commitment and interest in contributing to this important statewide effort. He reminded them of the sequence of regional workshops and the August 30-31 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

West Coast and Panhandle Regional Seaports Workshop Seaport Statewide Strategic Visioning and Planning Process August 4, 2006, in Tampa, Florida, 10:00-3:30 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
- To review state and regional partnership roles and responsibilities
- To identify regional trends, headwinds and tailwinds
- To review the key components, shared needs and characteristics of regional and statewide seaport business planning models
- To identify and refine draft guiding principles for a statewide and regional seaport strategic planning process reflecting the demands of the Florida Seaport Business model

Proposed Workshop Agenda

- 10:00 Welcome, Introductions/Participant Profile and Meeting Guidelines**
- 10:15 Overview of the Proposed Seaports Business Model Action Planning Process and Framework**
- 10:30 Context for Statewide and Regional Seaport Planning**
- 10:45 Partnership Roles and Responsibilities**
- 11:00 Identification, review and discussion of regional trends, headwinds and tailwinds**
■ Review and refine draft starter list.
- 11:30 Overview of the key components for business planning models for each of the regional ports: *Port of Manatee, Port Panama City, Port of Pensacola, Port of St. Joe, Port of St. Petersburg, Port of Tampa***
- 12:30 Lunch (*on site*)**
- 1:45 Identification and refinement of shared needs and characteristics of the seaport business planning models in the region.**
■ Review and refine draft starter list.
- 2:30 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.
- 3:15 Next Steps, Key Issues 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
West Coast and Panhandle Regional Seaports Workshop
August 4, 2006, Tampa, Florida, 10:00-3:30 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	7	6	2	0	0	=4.33
• To review the context for statewide and regional seaport planning	7	8	0	0	0	=4.47
• To review state and regional partnership roles and responsibilities	6	6	3	0	0	=4.20
• To identify regional trends, headwinds and tailwinds	8	5	2	0	0	=4.40
• To review the key components, shared needs and characteristics of regional and statewide seaport business planning models	7	7	1	0	0	=4.40
• 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	6	4	5	0	0	=4.07
WORKSHOP ORGANIZATION						
◆ Background and agenda packet were helpful	7	7	1	0	0	=4.40
◆ Plenary discussion format was effective	9	5	1	0	0	=4.53
◆ Facilitators guided participant efforts effectively	9	6	0	0	0	=4.60
◆ Participation was balanced	8	4	3	0	0	=4.33

What Did You Like Best About the Workshop?

- Well organized
- Hearing from folks outside the local area and from different industries
- It was direct and to the point while still giving participants a chance to speak
- Background info provided and discussions
- Open, relaxed discussion

What Could be Improved?

- Need more time to discuss trends, opportunities and obstacles
- Get more transportation vendors and port tenants to attend
- No real opportunity to discuss funding options or prioritization of options

Other Comments (continue on back if needed)

- Great session!

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>
Lorenzo Alexander	FDOT Seaport Office
Tony Austin	Martin Gas Sales
Stan Cann	District 1 Secretary, FDOT
Ed Chadwell	District 3, FDOT
Raymond Clark	District 7, FDOT
Ming Gao	District 7, FDOT
Brian Giuliani	Del Monte
Joe Gontarski	Port Manatee
Michael Horton	Moffat & Nichol
Ram Kancharla	Port of Tampa
Danny Lamb	District 7, FDOT
Mike Maholtz	Sarasota-Manatee MPO
David McDonald	Port Manatee
Walt Miller	Port of St. Petersburg
Doug Montgomery	Mosaic Company
Bob Nathan	Moffat & Nichol
Rasmus Okland	Gearbulk
Tommy Pitts	Port of Port St. Joe
Eddie Pollock	CSX Transportation
Stanley Riggs	Port Manatee Commerce Center
Wayne Stubbs	Port Panama City
Denver Stutler	Secretary, FDOT
Scott Taylor	CTL Distribution
Steve Tyndal	Port Manatee
Richard Wainio	Port of Tampa
Mike Williamson	Cambridge Systematics

Process and Facilitation Team:

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

Appendix #4

Planning Assumptions- Workshop and Online Survey Responses

- 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.**

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	4	3	1	2	0	3.9
West Coast and Panhandle Survey Responses (8-2)	4	0	0	0	0	5.0
West Coast/Panhandle 8-4 Survey Written Responses	10	3	0	0	0	4.8

West Coast and Panhandle Ports-Online Survey Comments

- The populations of Florida's major cities -- Jacksonville, Miami, Fort Lauderdale, Orlando, Tampa -- are growing rapidly, and a good portion of the goods arriving through Florida's seaports are distributed locally. These consumer markets benefit from the proximity of the seaports. The seaports also provide a convenient outlet for Florida exports.

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

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	2	3	3	1	0	3.7
West Coast and Panhandle Survey Responses (8-2)	2	1	1	0	0	4.2
West Coast/Panhandle 8-4 Survey Written Responses	10	3	0	0	0	4.8

West Coast and Panhandle Ports-Online Survey Comments

- I agree on principle, but don't really have the numbers to prove it.

- 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.**

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	4	3	2	1	0	4.0
West Coast and Panhandle Survey Responses (8-2)	4	0	0	0	0	5.0
West Coast/Panhandle 8-4 Survey Written Responses	7	4	1	1	0	4.3

West Coast and Panhandle Ports-Online Survey Comments

- Definitely. The diversity of our seaports is a source of strength. Even in cases where there is seeming overlap or redundancy, that is actually a benefit in emergencies. It also provides a broader market for stakeholder businesses. As each seaport grows and faces land constraints, Florida will be very fortunate to have the back-up capacity provided by ports that were once considered somewhat irrelevant.
- Perhaps its better to say each of Florida's active seaports

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

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	6	2	2	1	0	4.2
West Coast and Panhandle Survey Responses (8-2)	4	0	0	0	0	5.0
West Coast/Panhandle 8-4 Survey Written Responses	8	4	1	0	0	4.5

West Coast and Panhandle Ports-Online Survey Comments

- Definitely. Each seaport provides economic contributions to its local community. Check out the various economic impact studies prepared for the various ports, and you will see just how important these contributions are. The ports have just identified the benefits each has derived from the 1996 bond program, proving the substantial impact the projects implemented under that program -- as well as the 1999 program -- have had on their capacity, throughput, and competitive ability. I'm not sure what you mean by "transportation contributions," unless you mean the cost of goods is less if they come directly into the local community. A cynic would say, "yeah, lots of trucks and rail cars and buses."

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

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

West Coast and Panhandle Ports-Online Survey Comments

- Definitely! More forward-looking policies are needed to continue kick-starting the economies of some of Florida's trading partners in the Caribbean, Central America and South America. The impact of China's recent investments in that part of the world need to be assessed. If they help grow the economies of those nations, and increase their purchasing power and desire to buy goods from the U.S., then we all win. We need to be smart

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

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	4	4	1	0	1	4.0
West Coast and Panhandle Survey Responses (8-2)	4	0	0	0	0	5.0
West Coast/Panhandle 8-4 Survey Written Responses	4	7	3	0	0	4.0

West Coast and Panhandle Ports-Online Survey Comments

- The third border concept applies more specifically to Florida's relationships with its trading partners to the south in Central America, South America, and the Caribbean. While Florida is seeing its trade with other parts of the world -- particularly China -- the Third Border countries are important to Florida's two-way trade and the economic viability of locally based carriers, freight forwarders, and other industry stakeholders. Certainly, the Atlantic Commerce Corridor and the state's other established corridors are important to the flow of goods from all over the world to and from Florida's seaports.
- This is an pretty big overstatement

West Coast and Panhandle Ports-Workshop Survey Responses

- Plus jobs and tax revenue.

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

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	7	3	0	0	0	4.7
West Coast and Panhandle Survey Responses (8-2)	4	0	0	0	0	5.0
West Coast/Panhandle 8-4 Survey Written Responses	5	5	1	1	0	4.2

West Coast and Panhandle Ports-Online Survey Comments

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

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.).

	<i>Strongly Agree</i>			<i>Disagree</i>		<i>Avg.</i>
	5	4	3	2	1	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html						
Statewide Average (8-2)	7	2	0	1	0	4.5
West Coast and Panhandle Survey Responses (8-2)	3	1	0	0	0	4.8

West Coast/Panhandle 8-4 Survey Written Responses	4	6	1	1	0	4.0
---	---	---	---	---	---	-----

West Coast and Panhandle Ports-Online Survey Comments

- This statement was calculated by the FPFC's financial advisor, based on the seaports' statement of capital needs and available funding, so I agree.

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.

	Strongly Agree		Disagree		Avg.	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	8	2	1	0	0	4.6
West Coast and Panhandle Survey Responses (8-2)	3	0	1	0	0	4.5
West Coast/Panhandle 8-4 Survey Written Responses	7	4	1	0	0	4.5

West Coast and Panhandle Ports-Online Survey Comments

- Each of these factors has had an impact on the seaport' financial capacity. The rising costs of materials combined with implementation delays are like a one-two punch on top of the diversion of revenues to pay for mandated security infrastructure and the recurring operational costs associated with security. For example, if the Port of Miami tunnel had been built a decade ago, shortly after it received location design approval, it would have cost roughly half the current estimate.
- I agree with that rising construction costs and rising security costs have limited ports' resources. But I think annual operating costs and economic trends have not necessarily hurt Florida ports.

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.

	Strongly Agree		Disagree		Avg.	
Florida Seaports Statewide Strategic Visioning and Planning Process Online Survey http://consensus.fsu.edu/ports-survey/index.html	5	4	3	2	1	
Statewide Average (8-2)	7	3	1	0	0	4.5
West Coast and Panhandle Survey Responses (8-2)	3	1	0	0	0	4.8
West Coast/Panhandle 8-4 Survey Written Responses	9	2	1	0	0	4.7

West Coast and Panhandle Ports-Online Survey Comments

- Now that the seaports have made significant investments in their security infrastructure to meet mandated requirements, the costs that affect their bottom line are the recurring operational costs associated with security. These costs affect the seaports' ability to pay for their debit service and invest in new commerce-related infrastructure.

Appendix #5- Facilitation Team



Charles A. Towsley, P.P.M.

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

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

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

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

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

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