

PENNY FOR TRANSPORTATION



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Independent Transportation Surtax Oversight Board's

Inaugural Report

Covering January 1, 2019 to September 30, 2020



Broward County Commission



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Remarks from the Mayor

DISTRICT 9 – Dale V.C. Holness



Many of our essential workers depend on public transportation to get to and from work. Public transportation is an empowerment tool for low-wage earners and people with low incomes. It affords people the ability not only to get to work, but to get an education, get to healthcare appointments, grocery shop, and so much more. We must continue to ensure those in our communities who need this empowerment tool have full and easy access.

The Transportation Surtax continues to improve Broward’s economy by generating revenues and enhancing our transportation infrastructure. Our goal is to create approximately 30,000 new jobs and increase apprenticeships and other programs directed at areas with high unemployment and under employment rates.

In the Transportation Surtax Plan, there are more than 1,000 County and municipal projects. Since the launch, the Surtax has funded several projects to improve intersections, make school zones safer for our children and enhance our Paratransit service. The Surtax is also modernizing our bus fleet with free Wi-Fi and mobile ticketing, and will continue to create an open environment by adding more green, open space for walking, biking and recreation.

Over the 30-year period, we will continue to see roadway improvements, lighting and drainage projects, transit service enhancements, and various data and technology research and transportation-related studies to allow the County to invest in transportation technology and innovation.

This first-ever Inaugural Report highlights what we have accomplished since the passage of the Surtax. I hope you enjoy learning about our progress.



Oversight Board



CHAIR - Engineering/Construction Management: Alan Hooper

For more than 24 years, his companies have planned, designed, developed, constructed and managed more than 1.8 million square feet of neighborhood mixed-use construction projects. Email: ahooper@ob.broward.org



VICE CHAIR - Land Use and Urban Planning: Douglas Coolman

Coolman was a Principal at EDSA, Inc., a planning, landscape architecture and urban design firm in Fort Lauderdale and continues to practice as an independent registered landscape architect. Email: dcoolman@ob.broward.org



Finance: Phil Allen

Allen served as the County's Chief Financial Officer for nearly twenty years, during which time he also acted as the Interim Port Director during 2001/2002 and again in 2005, before being selected to act permanently in the role in 2006. He served as Port Everglades Director until 2011. Email: phallen@ob.broward.org



Environmental Sciences: George Cavros, Esq., P.A.

Cavros has been actively involved in advocacy, education, policies, coalition building and litigation that focuses on the environment, renewable energy, energy efficiency and protecting the State's natural resources. Email: gcavros@ob.broward.org



Architecture: Ronald E. Frazier

Frazier is the retired CEO/Owner of Ronald E. Frazier & Associates, PA, a position he held for more than 40 years with a variety of experiences in architecture and urban planning projects. Email: rfrazier@ob.broward.org



Resident Consumer of Public Transportation: Dr. Consuelo Kelley

Kelley is a regular user of Broward's TOPS! Paratransit service and is committed to the continuing improvement of transportation in Broward. Email: cokelly@co.broward.org



Former City or County Manager: Allyson C. Love

Love previously served as Deputy City Manager for the City of Miramar, Acting City Manager for the City of Fort Lauderdale and has experience in various other positions including Auditor, and Budget Director. Email: alove@ob.broward.org



Director of the Broward College Office of Supplier Relations and Diversity (As Identified in Ordinance): Anthea Pennant

Pennant has over 20 years experience in social services, economic development, business development, fundraising, and advocacy - always with a focus on strengthening communities for the advancement of the underserved. Email: anpennant@ob.broward.org



Accounting: Shea Smith

Smith has nearly 20 years of experience with a variety of companies and industries, working with business owners and entrepreneurs providing accounting, auditing and consulting services in Broward County. Email: sheasmith@ob.broward.org

Remarks from the Chair

CHAIR – Alan Cooper



I am proud to serve as Chair of the Independent Transportation Surtax Oversight Board. Our 9-member Board consists of a diverse group of dedicated Broward County citizens who represent specific categories of professions and expertise to oversee the community's investment of surtax dollars. By reviewing projects for eligibility, monitoring revenues and expenditures, and measuring the performance of projects, our Board assures that funds are being spent according to the Plan in an effective manner. Each member takes their responsibility to provide transparency and accountability of public funding very seriously.

During the first year, our Board assembled a highly talented administrative staff, and established Board policies and procedures to approve FY19 shovel ready roadway expenditures, traffic and safety projects, fleet/route and service improvements, community shuttles, and programming. The Board also established budget processes for FY20 County projects, municipal projects, transportation-related technology and innovation, marketing, communications, small business outreach and performance audits.

What's exciting to me is innovation and technology that is being implemented to Plan for the future of Broward County's mobility. Using technology and data, our systems will learn from patterns. This is critical to properly plan, build, synchronize, and fine tune the over-all system.

The citizens of Broward County overwhelmingly decided that investing in the future of transportation is a community priority. Taking cues from other modern cities, Broward County is committed to build a cutting edge system that is second to none and will elevate our quality of life and improve the experience of traveling in and around Broward County for residents and visitors.



Appointing Authority



Mr. Randall Vitale – CHAIR
(selected designee of the Broward Workshop)



Dr. Colin Polsky
FAU Center for Environmental Studies
(as designated in enacting ordinance)



Mr. Dan Lindblade
(selected designee of the Broward County Council of Chambers)



Ms. Bertha Henry
County Administrator
(serving in her capacity as County Administrator)



Mr. Arnold Nazur
(selected designee of Hispanic Unity)



Mr. Sidney Calloway
(selected designee of the Urban League of Broward County)



The Honorable Jack Seiler
(selected designee of the League of Cities)

About Mobility Advancement Program (MAP)

MAP's 5 Goals

- 1 Create Connectivity
- 2 Improve Transit Service
- 3 Relieve Congestion
- 4 Enhance Multimodal Options
- 5 Ensure Economic Development and Benefits

MAP's 3 Foundational Elements

- 1 Transparency
- 2 Accountability
- 3 Resiliency



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Executive Summary

Florida Statute 212.055(1)(d) authorizes Charter Counties to levy a transportation surtax for certain eligible purposes after the electorate of the Charter County votes to impose the sales surtax. Not all counties are eligible to place transportation surtaxes on their ballots; only Charter Counties and regional transportation systems are. Municipalities and federally-established metropolitan planning organizations are ineligible and may only receive surtax funds for eligible transportation purposes through an interlocal agreement with a Charter County.

The ballot language voted on by Broward residents said the following: “Shall countywide transportation improvements to reduce traffic congestion, improve roads and bridges, enhance traffic signal synchronization, develop safe sidewalks and bicycle pathways, expand and operate bus and special needs transportation, implement rail along approved corridors, and implement emerging transportation technologies, be funded by levying a thirty year, one percent sales surtax, paid by residents and visitors, with the proceeds held in a newly-created trust fund and all expenditures overseen by an independent oversight board?”¹ The surtax’s stated purpose was a way to enhance and improve existing mobility and transportation services — from roads, bridges, traffic signals and school zones to community shuttles, paratransit and fixed route transit services. New projects are also a significant element of the plan, with nearly 700 county and municipal projects approved since April 2019 (including the Five-Year Plan covering FYs2021-2025). A full transit systemwide study is underway, looking at existing service, while also evaluating premium transit investments like express bus service and rail.

A key component of independence is separation of oversight from the elected officials who adopt the County’s budget. The program’s expenditures are being overseen by an Independent Oversight Board (Oversight Board) as promised to voters. The County’s surtax ordinance (Article V, Section 31½ - 75) established an Appointing Authority with representatives from seven community entities, to select the members of the Oversight Board. After an open call for qualified volunteers in eight professional categories, a publicly noticed (“sunshined”) meeting occurred to evaluate and select oversight board members. Several

¹ <https://webapps6.broward.org/newsrelease/View.aspx?intMessageId=11048>



meetings of the Appointing Authority were necessary to fill all nine positions (a candidate withdrew from consideration, and two vacancies occurred during this reporting period).

Surtax funding supports numerous roadway, safety, and resiliency-related projects in the County's Public Works Department, but presently staff managing/delivering surtax funded projects are funded with gas taxes. While we recognize that gas taxes will continue to decline and positions may be funded by the surtax in the future, the County has pledged to continue using gas taxes to maintain existing roadway facilities and those new surtax-funded road and safety projects for as long as gas tax revenue is available.

Broward County Transit Department receives surtax funding to supplement its capital and operating budget, annually. Within the original financial plan, the County maintained an investment of general funds in the amount of \$27M for fixed route transit. Operations and maintenance expenses are specifically identified as eligible in the statute (212.055, F.S.) and were approximately 40% of the total expected costs associated with the 30-year plan.

The Mobility Advancement Program Administration (MAP Admin) was created as the entity tasked with operationalizing the Oversight Board's responsibilities (per ordinance and its own established by-laws). Initially a staff of three, MAP Admin has grown to seven individuals who provide support services and/or lead on cross-functional collaborations with other aspects of the program: finance, communications, program and performance analytics, project management, and municipal surtax project liaisons. In this reporting period, surtax dollars also fund a three-person planning and innovations team, as well as dedicated auditor, attorney, paralegal and two local preference goal specialists.



Background

In the 1950s, Broward County had a population of 84,000 people and only seven municipalities. Since then, the County has experienced tremendous growth, reaching today's population of over 1,900,000 people with thirty-one municipalities². This rapid expansion (Broward County is “built-out” and constrained by the Atlantic Ocean to the east and Everglades National Park to the west) has created an increasing need for transportation infrastructure to move people and goods across its 1,323 square miles. From its seagrass to sawgrass — a robust, multimodal transportation system is vital to making Broward an attractive place to live, work and play.

Gas tax, a gradually declining source of revenues, along with increased competition for federal and state grant resources, created the need for local economies to access new revenue sources. Florida Statute 212.055(1)(d) allows charter counties in Florida to implement sales surtaxes specifically for eligible transportation purposes³.

In 2016, the Broward County surtax campaign included a half cent for municipal infrastructure and a half cent for countywide transportation initiatives: both had to pass, or both would fail. The countywide transportation portion passed, but the municipal infrastructure half failed, so while the transportation portion of the measure was successful, it was unable to be implemented. Because there was clear public support for a transportation sales surtax and a significant foundation of a plan had been developed and vetted, the Broward County Commission directed staff to pursue the Charter County sales surtax for transportation.

The 2016–2020 Commission Strategic Plan was updated in early 2017 to reflect the unanimous support of the Board of County Commissioners for placing a full one percent sales surtax for transportation on the November 2018 ballot.

² <https://www2.census.gov/library/publications/decennial/1950/pc-02/pc-2-09.pdf>


³ http://www.leg.state.fl.us/statutes/index.cfm?mode=View%20Statutes&SubMenu=1&App_mode=Display_StatutSearch_Strng=212.055&URL=0200-0299/0212/Sections/0212.055.html



2016–2020 Broward County Commission Strategic Plan Value

Cooperatively delivering an efficient and accessible regional intermodal transportation network

Goals

1. Actively seek through an effective marketing plan, a full penny for transportation surtax in 2018 to support a world class intermodal transportation system including: a robust and reliable transit level of service, rail, intersection reconfiguration, adaptive signalization, and congestion relief  **Achieved**
2. Seek local, state, federal funding and public support for transportation projects that connect to existing transportation corridors, balancing ridership with community redevelopment demands
3. Provide a safe, sustainable integrated and efficient transportation system to enhance Broward County’s economy and livability
4. Support the development, design, and construction of sustainable, multi-modal transportation facilities throughout the County to meet the demands of residents, travelers, and businesses

Broward County voters approved a 30-year, one percent sales surtax for transportation in November 2018. The surtax took effect on January 1, 2019 and the first distribution of surtax revenues was received by Broward County from the Department of Revenue in March 2019.

The State of Florida retains 3% of all sales surtax revenues collected on an annual basis. FY2019, which covers the period of October 1, 2018 through September 30, 2019, (i.e. only 9 full months of surtax revenue receipts) generated \$282,631,200. FY2020, a year like no other in recent memory because of the COVID-19 impacts, saw a \$62M decline over surtax revenue projections — from \$361M to \$299M. With the economic uncertainty of COVID 19 remaining, full impacts on revenue projections are still unknown.



Building the Project-Based 30-Year Plan

Using the 2016 transportation surtax effort as a foundation, a financial plan focusing on congestion management, multimodal mobility, transit system enhancements, resiliency, safety, and innovations in transportation, was designed. Multiple iterations were reviewed by transportation and financial experts, internal and external to the County, and overlaid with other regional transportation plans to ensure consistency and optimal coordination. One of the results from these efforts was the establishment of annual funding being included in the financial plan for innovation in transportation technologies, to invest in research, testing, piloting, and deployment. The 30-year plan targets some of our community's biggest mobility and economic challenges, and it is committed to protecting the health, safety, and welfare of Broward County residents and visitors.

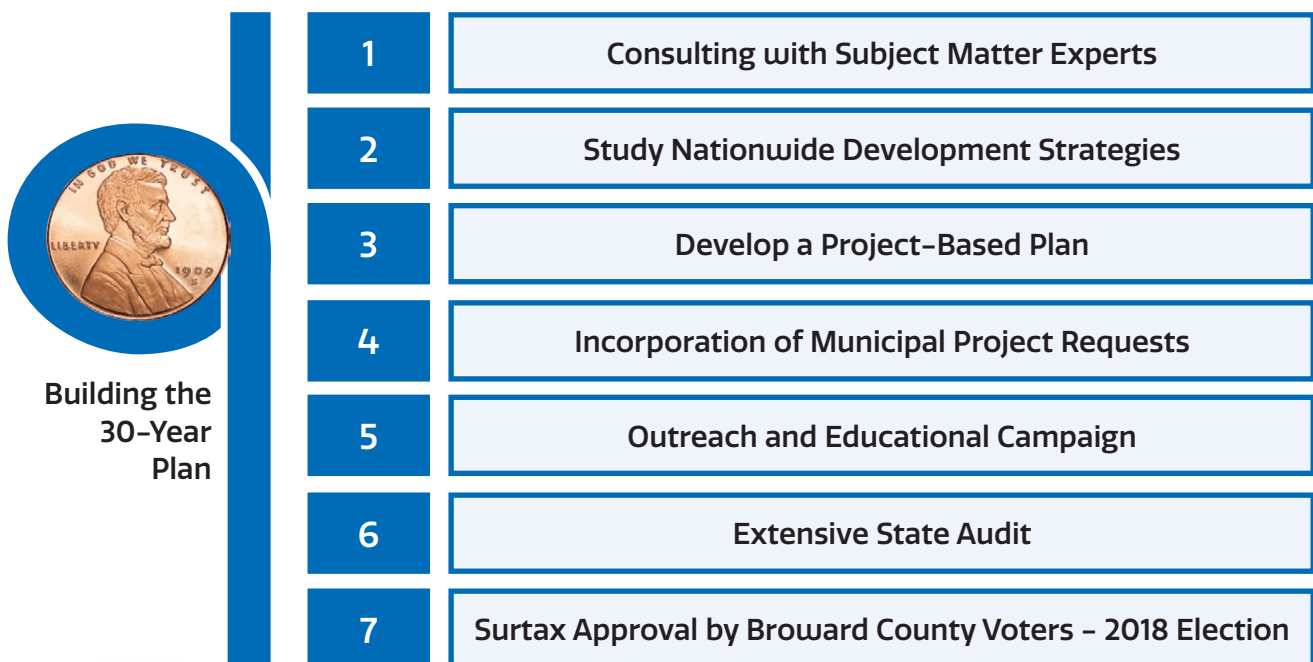


Figure 1. Building the 30-Year Plan.

The project-based plan was developed in collaboration with subject matter experts based on national and international best practices and direct input from local municipalities. In early 2018, the County invited all municipalities to submit a comprehensive list of requested transportation-related projects, with no cost limit, for inclusion in the initial Surtax 30-year Financial Plan.

The request coincided with the Broward Metropolitan Planning Organization’s Call for Projects as part of their development of a Commitment 2045 Metropolitan Transportation Plan. Cities were asked to update/review project lists and County staff met with many municipalities to discuss project coordination. Municipal-requested projects totaled approximately \$2.8 billion across the 30 years, not including the municipal Community Shuttle capital and operating costs, which were full-funded in the financial plan⁴. Certain amounts were set aside annually to fund municipal capital and rehabilitation and maintenance projects; however, municipal projects were not assigned specific years to be completed.

Per Agenda Item 74 of the June 5, 2018 County Commission Meeting, Commissioners passed a Resolution scheduling a Referendum Election to be held at the General Election on November 6, 2018 to levy a one percent Charter County and Regional Transportation System Sales Surtax commencing January 1, 2019 for a period of 30 years.

Extensive outreach occurred throughout 2018 to receive input on projects and inform the public about the proposed Plan (see also section entitled “The Educational Campaign”).

The State of Florida’s Office of Program Performance and Accountability (OPPAGA) initiated an extensive program audit of the County’s existing transportation programs, financial controls and operations, and proposed Surtax Plan (July–September 2018) and found no deficiencies. As required by State law, the audit was published to the County’s website⁵, along with the Program’s financial plan summary and detailed year-by-year breakdown⁶.

The County Commission determined that after successful passage of the referendum on November 6, 2018, municipal projects would be prioritized by the Broward Metropolitan Planning Organization (MPO) and funded annually, based on that prioritization with available surtax revenues, further defined in a global Interlocal Agreement among the County, MPO and municipalities, entered into in September 2018, prior to the vote.

⁴ <https://www.broward.org/PennyForTransportation/Documents/53632-TotalEstimatedSurtaxBudget2019-48-5-29-18.pdf>

⁵ <https://www.broward.org/PennyForTransportation/Documents/BrowardPerformanceAudit.pdf>

⁶ <https://www.broward.org/PennyForTransportation/Documents/53631-TotalEstimatedSurtaxBudget2019-48-5-29-18.pdf>



30-YEAR TRANSPORTATION SURTAX PROGRAM GOALS

Create Connectivity

- Vehicle-to-Infrastructure connectivity
- Reduce information "silos"
- Robust public engagement
- Multi-agency coordination
- Wayfinding improvements
- Open, transparent communication
- Reduce gaps in facilities (pedestrian, bicycling, and roadways)
- More options to connect to Public Transit
- Fiber Optic Network for mobility innovations



Improve Transit Service

- Fully-fund existing capital and operating costs of Municipal Community Shuttles
- Fund justified expansion and new Community Shuttle service
- Fully-fund improved levels of Paratransit
- Sustainable, low/no emission services
- Improved amenities on fixed routes
- Enhance safety, reliability, and accessibility
- Premium transit investments



Traffic System Management

- Intersection Improvements
- Traffic light synchronization
- Roadway widening
- Increase traffic flow and reduce bottlenecks
- Traffic calming; safety elements
- Evaluate utilization of multimodal facilities



Enhance Multimodal Options

- Improve safety of multimodal travel options
- Expand facilities for walking, bicycling, transit, and micromobility⁷
- Innovative technologies for pedestrian-scale safety analyses



Economic Development and Benefits

- An overall program goal of 30% for local business participation benefits certified small businesses registered in Broward County⁸. This ensures surtax dollars benefit local communities, businesses, and employment. Keeping local dollars working in our local economy!
- A goal of \$2.5B of leveraged funds from state and federal sources expands the resources available to invest in transportation initiatives, using a local dedicated source of revenue
- Capacity building and technical assistance to assure small businesses are certified and can compete for surtax funding
- Direct, indirect, and induced job creation in many sectors, including high-wage industries, anticipating 30,000 new jobs over 30 years
- Promote employability and equity with apprenticeships and other programs directed at areas with high unemployment and under employment
- Connect affordable housing to public transit to improve mobility access and affordability



Table 1. 30-Year Transportation Surtax Program Goals

⁷ Micromobility refers to a range of small, lightweight devices operating at speeds typically below 15mph <https://www.itdp.org/multimedia/defining-micromobility/>

⁸ The Broward County Board of County Commissioners developed the County Business Enterprise (CBE) program to increase participation of small businesses who are prime contractors and/or subcontractors on County projects.



"A Penny For Transportation"

Under the leadership of then-Mayor Beam Furr, the County embarked on an educational and grassroots campaign entitled "A Penny For Transportation".



Advocacy

Florida law prohibits the use of tax dollars on advocacy related to referenda, so running parallel to the fully County-funded educational efforts, an advocacy campaign worked to complement educational efforts.



Educational Campaign

From June 2018 through November 6, 2018, Broward County funded and executed an extensive countywide educational campaign including the creation of a detailed marketing plan that incorporated a dedicated website; the creation of collateral (flyers, brochures, posters, videos, banners, yard signs, displays, newsletters, and more); digital, radio and print advertising; social media; a heavily-utilized Speakers Bureau⁹; media relations; extensive outreach activities, and; the use of trusted voices throughout our community.



Promotional Material

Hard copies of promotional materials were available in English, Spanish, Creole, and Portuguese. At no cost to municipalities or the Broward Metropolitan Planning Organization, the County also provided educational materials and a "tool-kit" that included artwork for flyers, posters, graphics, banners, videos, logos, and a general PowerPoint presentation. Municipality-specific educational materials "Projects in Your City" and presentations were also developed and became a popular feature of the Penny For Transportation website.

Table 2. Promotional Campaign Leading to the Election.

A key to the campaign was "The Penny" lapel pin donated by the Broward League of Cities (BLOC) from the 2016 educational campaign.

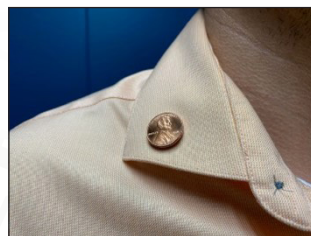


Figure 2. A penny lapel pin pictured on a shirt; the educational campaign's "logo".

⁹ Educational Campaign Speakers Bureau consisted of 35 County employees who volunteered mornings, nights, and weekends



Regulatory Framework for Broward County Transportation Surtax

Broward County Ordinance	Transportation System Surtax Interlocal Agreement	Interlocal Agreement for Surtax Services
<p>Ordinance 2018-29, effective June 2018:</p> <ul style="list-style-type: none"> • Levied the surtax subject to subsequent voter approval • Established a transportation surtax trust fund • Established Oversight Board for transparency and objectivity • Established a 7-member Appointing Authority • Provided application process for surtax proceeds tasking MPO with review and ranking of all municipal projects <p>Amended Ordinance 2020-08, effective February 2020:</p> <ul style="list-style-type: none"> • Separated municipal capital and R&M review and ranking process consistent with First Amendment to Global ILA: <ul style="list-style-type: none"> - MPO was tasked with review of municipal capital projects only - County was tasked with review and ranking of R&M projects 	<p>“Global ILA” between Broward County, Municipalities, and the MPO, effective September 2018:</p> <ul style="list-style-type: none"> - Project eligibility requirements - MPO review & ranking process for municipal projects based on ability to enhance connectivity & alleviate traffic congestion - Allowable use of surtax proceeds <p>First Amendment, effective June 2019:</p> <ul style="list-style-type: none"> • Amended ILA to ensure R&M projects be reviewed under separate criteria <ul style="list-style-type: none"> - Separated 506 municipal roadway and safety municipal capital projects to the MPO for review, including current and new applications - Separated 203 municipal R&M projects in the original surtax financial plan and subjected them to a different evaluation, ranking and funding process 	<ul style="list-style-type: none"> • Agreement between Broward County and the MPO effective May 2019: <ul style="list-style-type: none"> - Describes processes related to MPO review, rank, and prioritization of municipal projects - Includes scope of work, contract length, payment, reporting, staffing, and audit terms

Table 3. Regulatory Framework for Broward County Transportation Surtax



Oversight Board Activities: 2019–2020¹⁰

A key component of independence is separation of oversight from the elected officials who adopt the County’s budget. The program’s expenditures are being overseen by an Independent Oversight Board (Oversight Board) as promised to voters. The County’s surtax ordinance (Article V, Section 31 ½ -75) established an Appointing Authority with representatives from seven community entities, to select the members of the Oversight Board. After an open call for qualified volunteers in eight professional categories, a publicly noticed (“sunshined”) meeting occurred to evaluate and select oversight board members. Several meetings of the Appointing Authority were necessary to fill all nine positions (a candidate withdrew from consideration, and two vacancies occurred during this reporting period).

- February 14, 2019** Inaugural meeting and orientation of members
- February–March** Established Oversight Board Policies and Procedures
- April 25, 2019** Adoption of the Oversight Board Policies and Procedures, Mobility Advancement Plan overview and budget presentations, and determination of eligibility and approval of FY2019 expenditures.
- May 23, 2019** May 23, 2019 Discussion of the financial audit engagement; Oversight Board Rules and Procedures; presentation for Sawgrass Expressway/Pat Salerno interchange; role of Oversight Board in Project Oversight; budget process for FY20 proposed County projects; Community Shuttles and Non-Community Shuttle municipal proposed projects.
- June 27, 2019** Budget Workshop/Retreat to discuss FY20 proposed projects in the areas of roadways/traffic management/safety projects and transit, including municipal community shuttles. Also, proposed expenditures in administration, technology and innovation, marketing and communications, small business outreach.
- July 25, 2019** Discussion of revised final audit engagement, determination of eligibility of County FY20 budget requests by capital, operations and maintenance, planning/studies, and support services¹¹.
- September 26, 2019** Review eligibility of new County projects adopted in FY20 County budget; discuss proposed amendments for the Transportation Surtax Ordinance; approach to project cost changes (treatment

¹⁰ All Oversight Board meetings allow for public participation. During Covid-19, municipalities could attend in-person or participate virtually to discuss proposed surtax projects. All Oversight Board meetings are live-streamed, recorded, transcribed and materials are archived online. To view agendas, supplemental documentation, and minutes of meetings, please visit <https://www.broward.org/PennyForTransportation/Pages/OversightBoard.aspx>. To watch Oversight Board meetings: <https://www.broward.org/PennyForTransportation/Pages/default.aspx>.

¹¹ Broward County’s FY2020 Capital Budget Book starting on pages 5-9 thru 5-14 demonstrates in detail what was evaluated eligible by the Oversight Board and adopted by the County Commission. Visit <https://www.broward.org/Budget/Pages/Default.aspx>, FY2020 Adopted Capital Budget



of project contingency, change orders, etc.); surtax and gas tax revenue forecast; communications outreach strategies; and external financial audit plan.

- October 24, 2019** Discussion of Transportation Surtax Ordinance, responses to Request-For-Interest solicitation for performance audit firms, and small business participation.
- December 19, 2019** Special meeting to discuss proposed Transportation Surtax Ordinance Amendments.
- January 30, 2020** Discussion of Surtax Ordinance Amendments and the content for the Annual Report. The Oversight Board received updates on financial audit of surtax fund for fiscal year ending September 30, 2019; MPO Audit Process; proposed municipal capital evaluation, weighting and prioritization process; updates from Innovations and Mobility Planning team on planned engagements.
- April 2, 2020** Meeting was postponed due to COVID-19.
- May 22, 2020** Meeting to review Municipal Capital and Rehabilitation and Maintenance (R&M), and supplemental Public Works requests for FY2020. Meeting was disrupted by severe power outage and rescheduled.
- May 28, 2020** Meeting was rescheduled to June 4, 2020.
- June 4, 2020** Reschedule of May 28th meeting and remainder of May 22nd meeting (see above for details).
- August 13-14, 2020** FY2021 detailed budget workshop, project eligibility review and Five-Year Plan (FYs2021-2025) presentation. Included revenue projections adjusted by COVID-19 economic impacts.
- September 24, 2020** Review Inaugural report, presentation of the Public Outreach and Educational Plan, results of the 2019 Financial Audit, 2020 Audit Plan, and Discussion of Inaugural Report and Mobility Advancement Program Administrator/Oversight Board Coordinator's Annual Performance Appraisal.

For additional details, to view materials, read verbatim minutes, or watch videos, visit PennyForTransportation.com/Pages/Meetings.aspx



Program Activities and Accomplishments: 2019–2020



Figure 3. New Transit vehicles funded by the Transportation Surtax, displaying surtax branding

Broward County Transit (BCT)

Surtax investments include the acquisition of new vehicles and increased service for fixed route bus, TOPS Paratransit, municipal community shuttles, and studies for transit routes and infrastructure to promote connectivity, facilitate traffic management, and enhance transit services.

As part of the impacts of COVID-19, BCT maintained service during the pandemic, suspending fare collections to ensure essential workers and first respondents had access to transportation. As an additional effect of COVID-19, some initiatives planned for 2020 were postponed, including:

- Delayed construction of 88 new bus shelters for late 2020
- Postponed construction of 62 new shelters until 2021
- Microtransit pilot program deferred until 2021
- Fixed route service increase is under review, and 131 planned positions deferred
- Service revision and Comprehensive Operational Analysis deferred

Fixed-Route Bus

With the passage of the transportation surtax, Broward County Transit (BCT) immediately began fixed-route bus service enhancements in 2019, including:

- Restoration of service that was eliminated during the recession (Routes 8 – Taft Street and 88 - Pine Island)

	2019	2020
Capital	<ul style="list-style-type: none"> • Equip fleet with on-board Wi-Fi equipment, mobile ticketing, and pilot program for free downloads from Broward Libraries • Purchase of 65 new fixed-route buses • 128 new TOPS paratransit propane-fueled vehicles 	<ul style="list-style-type: none"> • Delivery of 65 new fixed-route buses ordered in 2019 • 88 bus shelters scheduled for completion by end of 2020 • 37 new bus stop pads installed for future Rock Island route • 49 new TOPS! Paratransit vehicles • Purchase of 30 new Community Shuttle buses for existing service, and 3 buses for service expansion, delivery in early 2021
Operating	<ul style="list-style-type: none"> • 10% service increase including frequency and service hours on 8 routes • Service restoration in 2 routes. • Job creation: 108 positions • Increased the per-trip subsidy for Paratransit Rider’s Choice Program from \$15 to \$18 	<ul style="list-style-type: none"> • 18 municipalities with Interlocal Agreements to fully fund Community Shuttle routes
Planning	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • Transit Systems Plan to study Rail and Bus Rapid Transit corridors. • General Planning Consultant “as needed” services

Table 4. Broward County Transit Activities 2019 -2020

- Increase in bus frequency and expansion of service hours on local routes to meet the needs of customers and requests from the business community (Routes 4, 12, 16, 19, 31, 55, 62, 101)
- Purchase of 65 new fixed-route buses to support these services
- On-board Wi-Fi equipment, mobile ticketing, and a pilot program for free download of music and books from Broward Libraries
- New shelters and local bus infrastructure improvements

Expansion of Service Hours

- 121,000 annual revenue hours of new service were added system-wide in 2019
- New service was deployed during July 2019 (54,000 new service hours) and September 2019 (67,000 new service hours)
- In January 2020, additional new service was deployed (1,300 new service hours), but the scheduled 10% increase in service during May and September 2020 has been put on hold due the COVID-19 pandemic



TOPS! Paratransit Service

The Broward County Commission increased the per trip subsidy for BCT's Paratransit Rider's Choice Program from \$15 to \$18. The Rider's Choice Program is a pilot program, through January 31, 2021, that allows existing paratransit riders to choose same-day, direct-to-destination taxi service, in lieu of TOPS paratransit service.

Pre-pandemic demand for TOPS! Paratransit Service had been increasing annually for several years, often by double-digit growth. For example, TOPS! Paratransit Service experienced a 13.4% growth in service in 2019. By 2030, Broward's 60+ population will increase 48 percent; nearly half will be in the 75+ age group. The highest rate of growth will be in the 80-84 age group which is expected to grow by more than 73% by 2030. In response to these ridership trends and future projections, 128 new TOPS Paratransit propane-fueled vehicles were purchased in 2019, and 49 new TOPS Paratransit vehicles were purchased in 2020. These 49 new 2020 vehicles are also programmed for propane conversion in 2021.

Of the 177 Paratransit vehicles purchased with surtax funds, 98 replaced existing vehicles that had exceeded their useful life, and 85 vehicles were purchased to expand the fleet to meet increasing demand. The 85 surtax funded expansion vehicles, along with 13 federally funded vehicles, have increased the Paratransit fleet from 252 vehicles in 2018, to 350 vehicles in 2020.

New Service – Two new Community Shuttle routes will begin in 2021

In addition to the existing program, BCT reached out to all 31 Broward County municipalities in 2019 with an invitation to apply for new or expanded Community Shuttle service. BCT received applications from North Lauderdale, Oakland Park and Plantation. After staff review, one of these proposals met the established criteria and was approved for funding. In 2021, new East and West routes in North Lauderdale will be implemented, including the purchase of three new buses, with the use of funds from the transportation surtax.

Service Expansion

Requests for new or expanded service in 2019 were received from several existing Community Shuttle partners including Coconut Creek, Deerfield Beach, Fort Lauderdale, and Hallandale Beach. Deerfield Beach's service application for a route



called “Express 1” was approved for funding. Coconut Creek’s and Hallandale Beach’s service applications are pending further staff review. Fort Lauderdale withdrew its application and will be seeking instead to apply in future years. In 2020, requests for expanded service from existing Community Shuttle partners included Lauderdale lakes and Deerfield Beach. These requests are pending further review.

Vehicle Purchase and Upgrades

In 2020, a total of 30 new buses were purchased for the existing Community Shuttle program. In addition, 3 new buses were purchased for the new expanded East and West routes in North Lauderdale. These 33 new buses will be delivered in early 2021, and they are also scheduled for propane conversion in 2021.

2020 Studies by Broward County Transit Include:

In 2020, BCT began an extensive study and planning phase that includes the analysis, planning, environmental review, preliminary engineering design, and the development of recommendations regarding the phasing and implementation of premium high-capacity transit countywide. The objective is to obtain a final Transit Systems Plan (TSYS) report in twelve (12) to fifteen months. The TSYS will evaluate and determine the feasibility of adopting Rail, Bus Rapid Transit (BRT) and other modes of transportation into the current transit system. In addition, a service revisioning and Comprehensive Operational Analysis (COA) for existing fixed-route bus service has been postponed due the COVID-19 pandemic. Current studies and planning activities include the following:

Transit Systems Plan (TSYS) - \$10.6M

- Conduct a system-wide transit study that will make recommendations and identify the potential 26-mile rail network corridors to be developed, including commuter service
- Conduct an analysis that identifies suitable transit capital and operational investments on major corridors in Broward County and provide recommendations for implementing corridor-based Bus Rapid Transit (BRT) or fixed guideway BRT on corridors identified in a system-wide transit study
- Include a comprehensive public participation program, environmental analysis, corridor feasibility and alternatives analysis, market research, strategic planning, financial planning, implementation planning and safety and security
- Provides funding to achieve 30% design completion for one Rail project and one BRT project



General Planning Consultant Services (GPC) - \$2M annually for up to 5 years

- The intent of the GPC program is to provide BCT with the expertise and flexibility necessary to carry out planning and study needs on a timely, and “as-needed” basis in the following areas: Capital Project Planning and Development; Transportation Planning and Analysis; Environmental Planning; Economic Development Planning; Public Involvement and Outreach; Grants Compliance, Monitoring, and Development; and Organizational Assessment and Review
- Some of the potential products expected include but are not limited to: data collection and passenger surveys; service planning (all modes), analysis and evaluations; intelligent transportation systems planning and engineering (i.e., transit signal priority, autonomous vehicles); field/condition surveys; conceptual designs; funding and financial systems; environmental analysis (per state and federal law); strategic planning/business process development/organizational efficiency; facilities (existing and new; safety and security planning; and rail (service and capital plans)

Service Revisioning and Comprehensive Operational Analysis (Postponed due to the COVID-19 pandemic) - \$2M

- Detailed review of existing operations and transit services to enhance efficiency and effectiveness of the system and provide recommendations for BCT’s future system
- Provide practical strategies to enhance service quality for existing and potential customers to increase ridership and productivity; update service and productivity standards; update route and stop-by-stop data; and provide recommendations for financial and operational improvements
- Design transit services not only for BCT’s current services but also new modes such as Bus Rapid Transit (BRT) and Light Rail Transit (LRT) systems, electric bus technology, autonomous technology, and the feasibility of incorporating Mobility on Demand as a service options for customers



Figure 4. New Transit vehicles funded by the Transportation Surtax, displaying the surtax branding “Brought to You by the Penny for Transportation” on back top right.

Public Works



Figure 5. Fiber Optics



Figure 6. School Safety Zone Improvements

	2019	2020
Capital	<p>9 Construction projects:</p> <ul style="list-style-type: none"> ● Fiber Optic Network <ul style="list-style-type: none"> - Pine Island Road from Broward Blvd to Oakland Park Blvd - Sunrise Blvd/NW 136 Ave vicinity ● Mast Arms <ul style="list-style-type: none"> - Broward Blvd at East 15 Ave - Stirling Rd at Palm Ave - Wiles Rd at Coral Springs Drive ● School Zone Improvements <ul style="list-style-type: none"> - Bayview Elementary - Charles Drew Elementary - Maplewood Elementary - Morrow Elementary 	<ul style="list-style-type: none"> ● 41 projects in 12 categories: <ul style="list-style-type: none"> - Adaptive Signal Control - Bike lanes - Drainage - Fiber Optics Network - Intersection - Lighting - Mast Arm - Bridge - Road Capacity Expansion - New Sidewalks - Video Detection Maintenance - School Zone
Planning	<ul style="list-style-type: none"> ● Adaptive Signal Technology Evaluation Study to: <ul style="list-style-type: none"> - Evaluate effectiveness of Adaptive Traffic Control Systems (ATCS) for Broward County roadways, and compatibility with existing infrastructure. - Recommend optimal ATCS for the road segments identified - Develop design standards for ATCS for implementation in Broward County ● Assist in developing an evaluation approach for Rehabilitation and Maintenance projects 	<ul style="list-style-type: none"> ● 3 Corridor Delivery Studies to: <ul style="list-style-type: none"> - Evaluate the feasibility and advantages of implementing certain projects together to improve efficiency and minimize impacts to the public - Identify and recommend projects along or adjacent to Pine Island Road, Andrews Avenue, and Atlantic Boulevard appropriate for corridor delivery approach ● Engineering review of construction phase of municipal projects

Table 5. Broward County Public Works Achievements 2019–2020



Broward County Public Works – Surtax-Funded Capital Projects

During 2019 and 2020, Broward County Public Works began executing over 52 projects in 12 categories, totaling over \$36M.

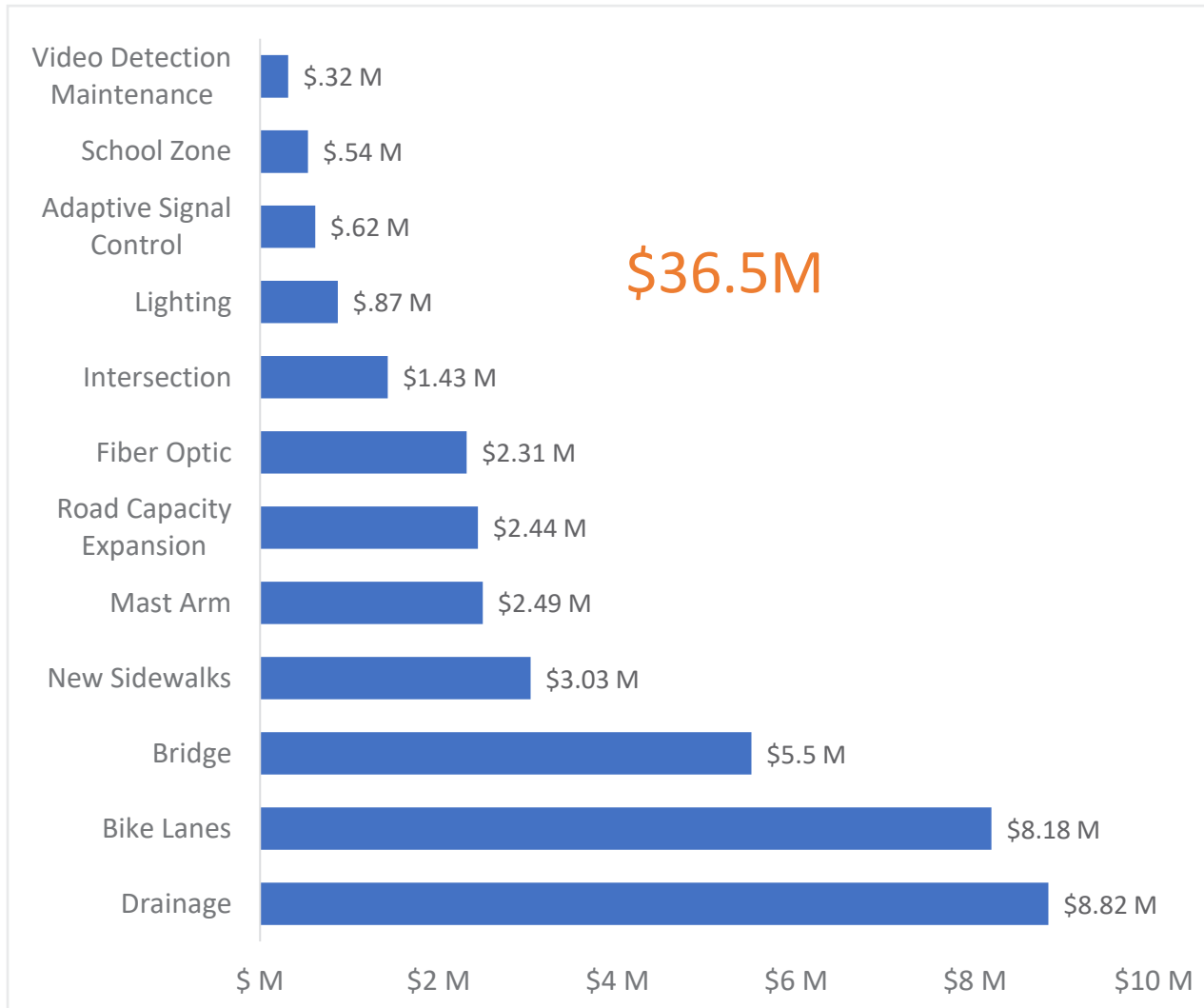


Figure 7. Public Works Capital Projects 2019 -2020



Figure 8. School Safety Zone Improvements



Figure 9. Signalization



Figure 10. Signalization



The Mobility Advancement Program

The Mobility Advancement Program (MAP), funded by the transportation surtax, is the name used to describe all elements of the 30-year project-based plan including transportation, public works, municipal projects, innovation investments, planning, operations, maintenance, and administrative support services used to operationalize the Program.

Mobility Advancement Program Administration Implementation Nov. 2018–Sept. 30, 2020



<p>Accountability</p> 	<ul style="list-style-type: none"> • Report to internal and external stakeholders about surtax processes • Internal financial controls • Program performance and financial analysis • Progress and performance reporting • Integrate data and reporting with project costing system • Promote project efficiency and effectiveness • Secure financial and program audits (as requested by Oversight Board)
<p>Transparency</p> 	<ul style="list-style-type: none"> • Open meetings and public engagement website, social media, presentations, videos, and broadcasts • Community outreach, public engagement, educational activity, GIS database, and public Project Dashboard (under development) • Detailed budgetary and programmatic information on website • Inform the public and correct misinformation
<p>Administrative Support</p> 	<ul style="list-style-type: none"> • Appointing Authority: Planning, agenda, and presentation • Oversight Board: Planning, agenda, presentations and briefings for meetings, workshops, and retreats • Manage MPO Surtax Services agreement • Prepare briefings, updates and recommendations to County Commission and County Administration (Executive Core Surtax team) • Prepare surtax budget for Oversight Board action • Convey Oversight Board recommendations to the County Commission
<p>Governance</p> 	<ul style="list-style-type: none"> • Create policies and procedures for managerial processes • External Stakeholders communication: Florida Department of Transportation, District 4, Metropolitan Planning Organization, Municipalities, State, Federal agencies, businesses, and residents • Coordinate Core Surtax Executive Group
<p>Legal Counsel</p> 	<ul style="list-style-type: none"> • Review eligibility for surtax-funded proposed projects/expenses • Provide legal support to Oversight Board for project eligibility determinations • Conduct contract negotiations with municipalities when entering a surtax-funded interlocal agreement • General legal services, including guidance regarding Policies and Procedures, regulations, and ethics training to Oversight Board

Table 6. Mobility Advancement Program Administration - Implementation Activities



MAP Administration in Action

The Mobility Advancement Program Administration (MAP Admin) continues to operationalize the Oversight Board’s responsibilities and to provide planning and support services to effectuate the 30-year program. In February 2019, the Oversight Board selected a Board Coordinator and legal representative who became the initial staff of MAP Admin. Over the next 18 months, six positions were added to MAP Admin focusing on finance, program performance and analytics, procurement strategies, program and project management, and public education. These staff were tasked with supporting the Oversight Board’s responsibilities, facilitating collaboration with program stakeholders, managing the MPO municipal prioritization agreement, and creating the framework to manage municipal surtax project funding agreements. Additionally, three surtax-funded positions were added to the Planning Division (Engineer, GIS analyst, and Senior Planner) all of whom will eventually co-locate with MAP Admin and become a single team. As the program continues to evolve, so does MAP Admin.

Public Outreach and Education

MAP Admin is charged with consistently and transparently presenting surtax program-related information to the public. MAP Admin staff presented and participated in meetings, conferences, and events to promote and answer questions about the transportation surtax to the public, municipalities, chambers, professional associations, local, state, and federal elected officials, interested vendors, etc.¹²

The dedicated [PennyForTransportation.com](https://www.pennyfortransportation.com) website is frequently updated to serve as an educational and outreach tool for residents, businesses, and stakeholders. The most visited [PennyForTransportation.com](https://www.pennyfortransportation.com) webpages are: Oversight Board Meetings (an archive of each meeting including minutes, broadcast video and presentations); and Projects in Your City (a city-by-city breakdown of municipal requested projects being updated to reflect Cycle 1 and Five-Year Plan). The Projects in Your City page is being replaced in late 2020 with a public dashboard offering interactive, up-to-date map tools with narrative and visual project details. The Oversight Board tab is the most popular tab in 2020, with many choosing to watch live Oversight Board Meetings from the page.

A Public Education and Outreach Plan, to coincide with the roll-out of the first Five-Year Plan will use segue branding and marketing, and a robust, diversified

¹² The number of presentations to various groups and interested stakeholders exceeded 150 during this reporting period for Map Admin and Innovations Team



campaign strategy, to ensure residents and stakeholders have input and meaningful information about the program. Recognizing the general public's safety concerns regarding the COVID-19 pandemic, MAP Admin is making every effort to grow the program's online presence through its Public Information Officer.

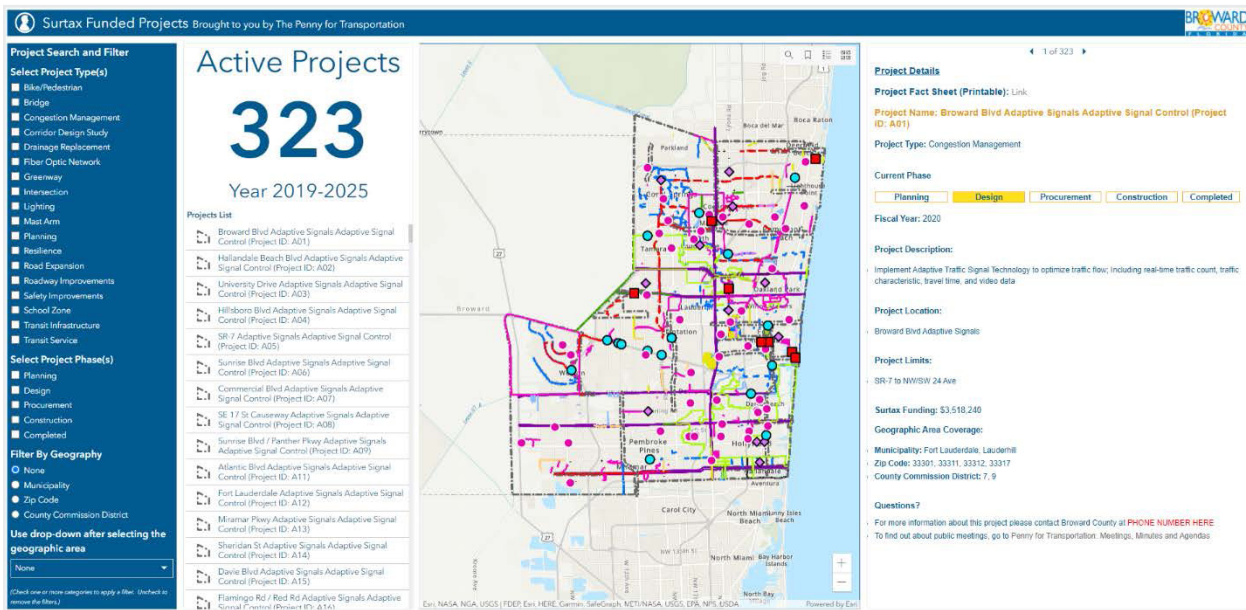


Figure 11. Preview of public facing interactive dashboard, currently under development

By 2021, meetings and events will be accessible on Facebook live and Instagram TV. To keep the public engaged, MAP Admin will also conduct interactive online events. The Twitter account @BrowardMobility has been established.



Figure 12. Mobility Advancement Program – We are on Twitter @BrowardMobility.

Metropolitan Planning Organization

The Broward Metropolitan Planning Organization (MPO) has federal- and state-mandated purposes and acts as the County’s long-range transportation planning entity. It also has a role in determining how certain federal transportation money is distributed within our community.

Prioritization "Surtax Services" Agreement

For the creation of the Transportation Surtax Plan approved by voters, municipalities submitted any transportation-related projects they wanted over the 30-year program horizon, which were then programmed into the financial plan without a specific date for project delivery. The MPO was identified by the County Commission as the entity responsible for prioritizing municipal projects. Broward County and the MPO entered a 5-year “Surtax Services” Prioritization Services Agreement in April 2019, in an amount not-to-exceed \$3,891,009. The agreement required the MPO to use a modified Metropolitan Transportation Plan (MTP) or Complete Streets and Localized Initiatives Program (CSLIP) methodology to prioritize projects contained in the original program. A modified CSLIP process was used¹³.

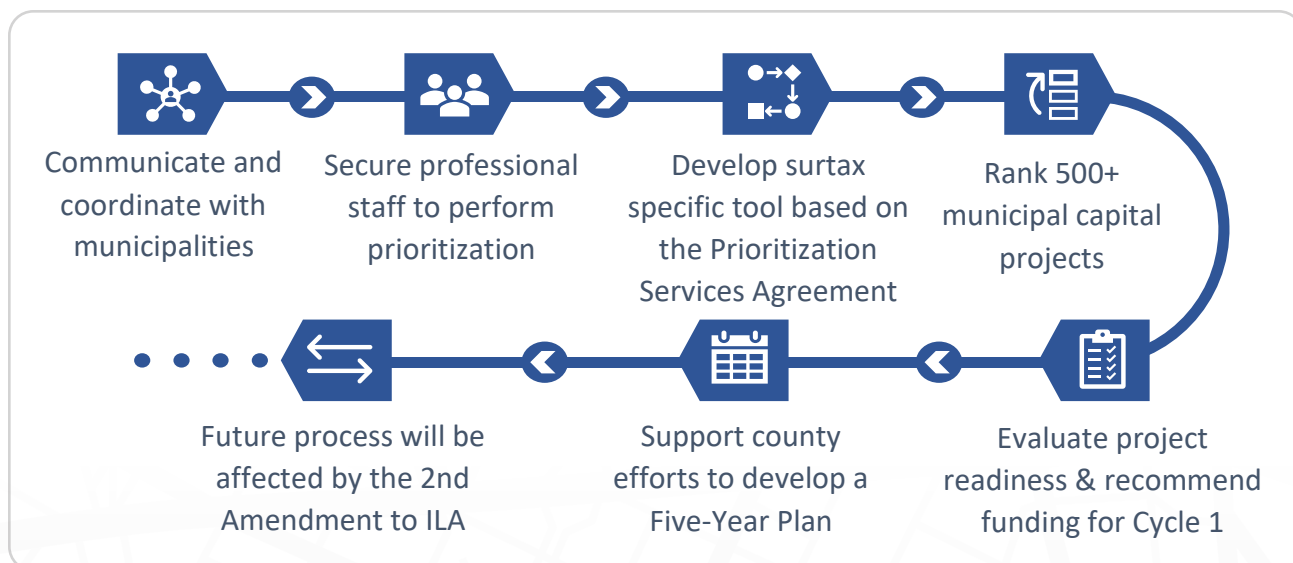


Figure 13. Broward Metropolitan Planning Organization Responsibilities under the Prioritization Services Agreement with Broward County.

The agreement tasked the MPO surtax-funded staff to review, rank and recommend over 500 capital municipal-requested transportation projects included in the 2018 plan based on their ability to relieve congestion and improve

¹³ <https://broward.legistar.com/LegislationDetail.aspx?ID=4633447&GUID=9FBB9BC6-7B3C-4937-952B-FA89401A894B>



connectivity. The surtax-funded staff spent the last half of 2019 evaluating projects submitted by municipalities and developed an online submittal tool to facilitate the collection of detailed project information.

Metropolitan Planning Organization Activities: 2019–2020








Aug 28, 2019		<p>Municipal Surtax Workshop:</p> <ul style="list-style-type: none"> - Online submitting tool demo. Tool was available from Aug 29 through Sep 17, 2019 - 79 attendees
October 2019		<p>Meeting with municipalities:</p> <ul style="list-style-type: none"> - Discuss project details (scope, locations, etc.) - Map project location into Geographic Information System
Oct 23, 2019		<p>Municipal Surtax Workshop:</p> <ul style="list-style-type: none"> - Ranking criteria and evaluation approach, including resiliency and equity. 58 attendees
Dec 5, 2019		<p>Municipal Surtax Workshop:</p> <ul style="list-style-type: none"> - Scoring methodology and project readiness approach - Maps were presented to municipalities for revision - 67 attendees
Feb 2020		<ul style="list-style-type: none"> - Municipal Surtax Workshop about Capital Projects priorities - 69 attendees - Discuss municipality their concerns about Cycle 1 priorities - Transmittal of municipal capital project priorities
April 2020		<ul style="list-style-type: none"> - Five-Year Plan coordination with surtax staff. - Compile eligibility information requested by County staff, from 27 municipalities
May 2020		<ul style="list-style-type: none"> - Meeting with municipalities to prepare for the Oversight Board eligibility review. - Presentation of municipal capital projects to the Oversight Board
June 2020		<ul style="list-style-type: none"> - Meeting with surtax staff on Five-Year Plan scenarios - Develop Five-Year Plan scenarios - Initial approach on new and “swap-out” projects
July 2020		<ul style="list-style-type: none"> - Presented 5 Five-Year Plan scenarios to the County. Meeting included staff from FDOT - Transmittal of Five-Year Plan Recommendation Scenarios

Table 7. Metropolitan Planning Organization Activities 2019-2020

Municipal Projects



Figure 14. City of Tamarac Bus



Figure 15. City of Coconut Creek Bus

The 30-year project-based plan included municipal requests totaling \$2.8 billion¹⁴ for capital and rehabilitation and maintenance projects plus another \$540M for the Community Shuttle program. The Interlocal Agreement approved by the Board of County Commissioners August 21, 2018 guarantees a minimum of 10% of annual surtax revenues to fund municipal projects and the Community Shuttle program. Between the time of the surtax’s passage and the effective date of the County and MPO Surtax Services Agreement, municipalities were permitted to swap out projects¹⁵, so long there was no financial impact to the plan. Under existing agreement terms, new¹⁶ municipal projects may be submitted for consideration beginning in 2021.

Surtax revenues collected from 2019 and 2020 were allocated to fund the first round of municipal projects in FY2020, referred to as Cycle 1. For Cycle 1, municipal capital projects were reviewed, ranked, and prioritized by the Broward MPO, based on a variety of factors, including their ability to *alleviate traffic congestion and enhance connectivity, as well as project readiness*.¹⁷

Municipal Rehabilitation and Maintenance (R&M) projects were separated from the MPO’s evaluation and ranking process through the First Amendment to the Global ILA. The County and Municipalities worked collaboratively on an evaluation process for R&M projects. The County hosted two well-attended workshops and then provided the proposed criteria to municipalities and their legal counsel for input before finalizing the approach. All the documentation of the scoring criteria with definitions and scales was submitted and shared with municipalities and

¹⁴ Projects included 700+ municipal-requested roadway related projects and full funding for Community Shuttles.

¹⁵ “Swap outs” were of similar project types and scopes, often resulting from a municipality completing a project contained in the surtax plan using another funding source, or a lack of continued political support for a project.

¹⁶ I.e., not one of the 709 municipal projects submitted as part of the original 2018 plan

¹⁷ http://www.browardmpo.org/images/WORKSHOP_Surtax_Criteria_20191023_with_polling_rev.pdf



made available on the [PennyForTransportation.com](https://www.broward.org/PennyForTransportation.com) website¹⁸. The R&M online project application and evaluation portal was initially intended to be open from April 1st through April 30th, but because of COVID-19, and at the request of several municipalities, the County extended the submittal deadline for sixteen additional days until May 16, 2020. Upon deployment of the online application and evaluation portal, a virtual training session with real time demonstration, and questions and answers, was made available on April 10, 2020¹⁹. After significant feedback from municipalities, a Frequently Asked Questions document was also created and made available through the Penny For Transportation website. Sixty-two project applications, requesting almost \$83M, were submitted and evaluated based on a number of factors, including need (condition of facilities) and funding distribution equity.

Cycle 1 – FY2020 Approved Projects

On May 22 and June 4, 2020, surtax-funded staff at the MPO presented a ranked list of recommended capital projects to the Oversight Board for eligibility review. The original list contained 110 municipal projects, including 33 projects considered construction-ready and 77 projects in either planning or design phases. Ultimately, 97 municipal capital projects were deemed eligible and recommended by the Oversight Board to the County Commission, 63 of those projects were in a Planning or Design phase; the next phases of those projects became the foundation of the first Five-Year Plan (FYs2021-2025) which was presented to the Oversight Board on August 14, 2020. Ten capital projects retain their ranking, but have yet to be presented to the Oversight Board at the sponsoring municipalities' requests.

The Oversight Board also reviewed and deemed 62 R&M projects eligible, on June 4, 2020. County Commission approved 40 R&M (construction only) projects to be included in Cycle 1, for a total not-to-exceed amount of \$55.5M.

¹⁸ <https://www.broward.org/PennyForTransportation/Pages/RehabilitationMaintenanceProjects.aspx>
¹⁹ <https://vimeo.com/408853559/57c4cf1c9f>



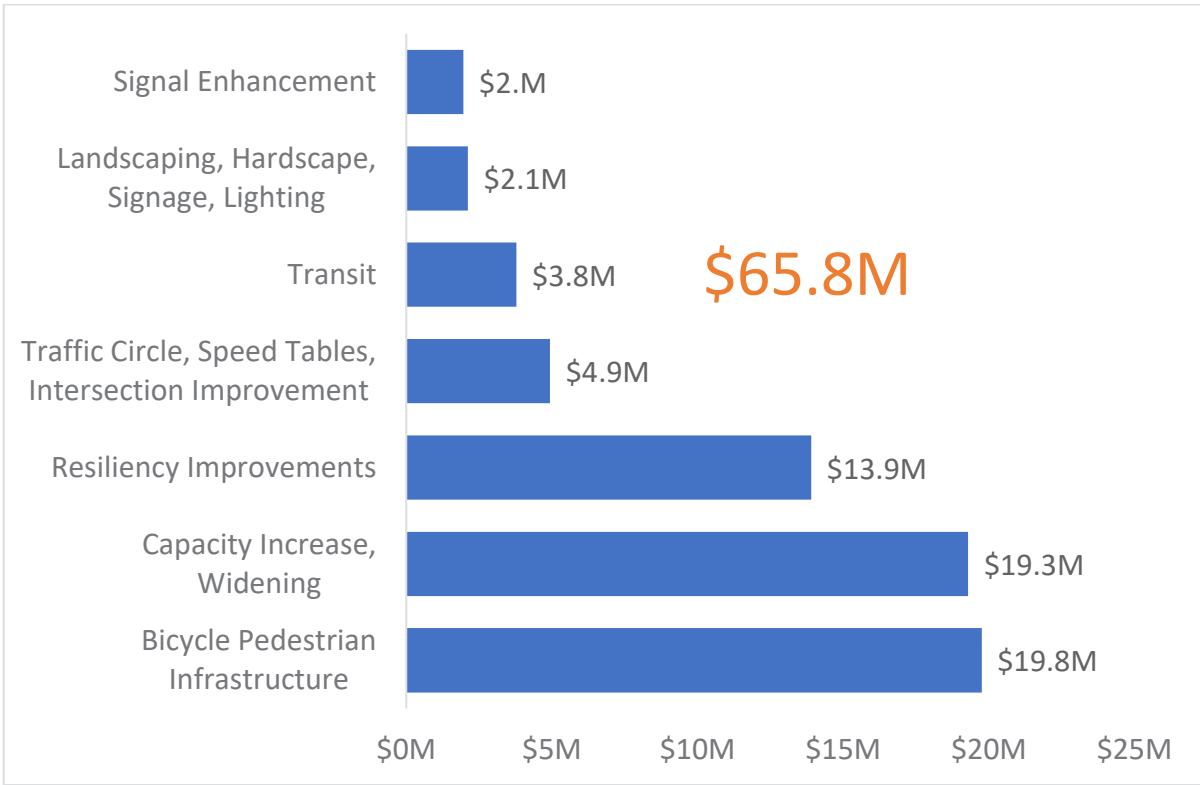


Figure 16. Municipal Capital Projects FY2020, Cycle 1

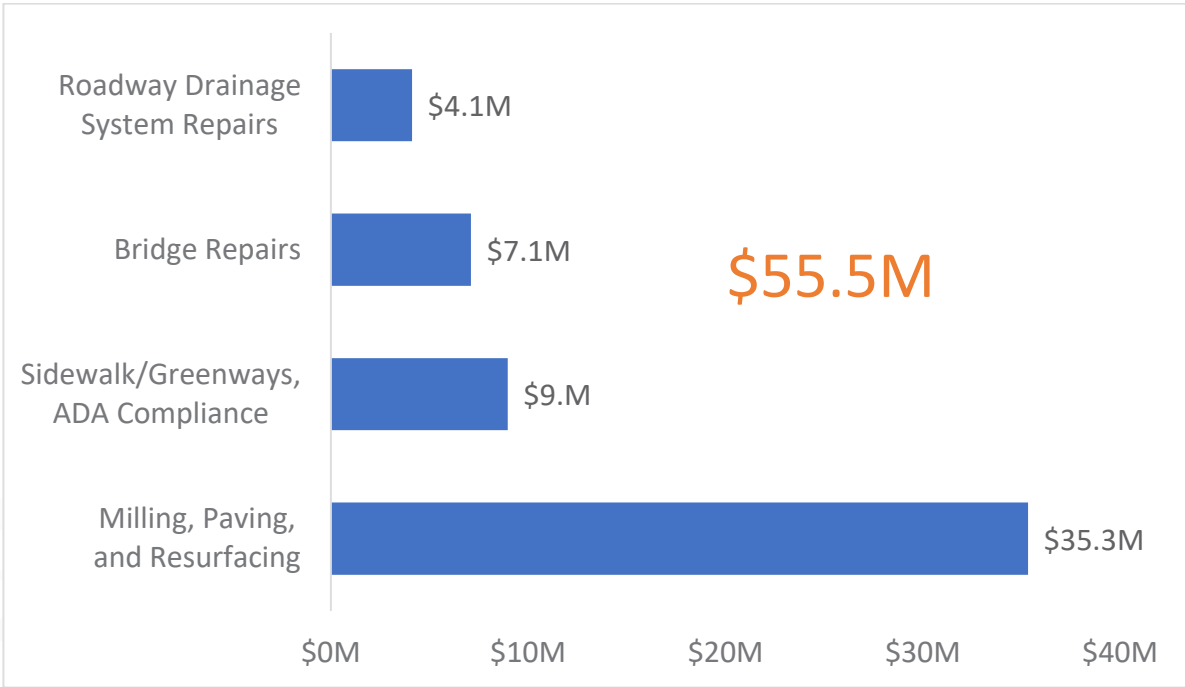


Figure 17. Municipal Rehabilitation and Maintenance Projects FY2020, Cycle 1.



Municipal Project Funding Agreements

Project-specific agreements developed in collaboration with the municipalities will be the mechanism by which the County provides funding for municipal Capital (Planning, Design and Construction phases) and R&M (Construction) projects.

Surtax funding will be distributed to awarded municipalities once project-specific agreements for municipal capital and R&M projects have been fully executed. Municipalities will work closely with MAP Admin staff in contract negotiations to ensure full collaboration and engagement throughout the development of each agreement. Each agreement will delineate eligible activities and expenses consistent with Florida Statute 212.055 (1)(d)(1)-(4)²⁰ and the Global Interlocal Agreement.

Municipal Community Shuttles

Municipal Community Shuttles provide a key link in BCT’s regional transportation network, allowing wheelchair-accessible mini-bus circulation into city neighborhoods and destinations more difficult to serve with larger buses. Broward County Transit provides technical staff support and assistance including training, service planning, scheduling, printing of bus schedules, and the purchase of shuttle stop signs. Existing Community Shuttle programs in 18 municipalities became eligible for full funding (total capital and operating/maintenance costs) in October 2019 through the transportation surtax.

Existing Community Shuttles		
Coconut Creek	Hallandale Beach	Margate
Coral Springs	Hillsboro Beach	Miramar
Dania Beach	Lauderdale-By-The-Sea	Pembroke Pines
Davie	Lauderdale Lakes	Pompano Beach
Deerfield Beach	Lauderhill	Tamarac
Fort Lauderdale	Lighthouse Point	West Park

Table 8. Existing Community Shuttles ²¹

Municipalities must maintain 7.1 riders per hour to qualify for surtax full funding. Over the 30-year plan, it is estimated that over \$540M will go towards funding of existing Community Shuttle service. New or expanded service will be approved only after evaluation and funded from surtax city project funding.

²⁰ http://www.leg.state.fl.us/STATUTES/index.cfm?App_mode=Display_Statute&URL=0200-0299/0212/Sections/0212.055.html

²¹ Shuttle Facts: <https://www.broward.org/BCT/Documents/Services/CommunityShuttleFacts.pdf>



Local Preference and Small Business Participation in the Program

The importance of the wellbeing of residents and the local economy is evidenced in the inclusion of economic development and benefits as a goal of the surtax program. The County Commission meeting established a local preference program goal of 30% on all eligible surtax projects to increase participation of small businesses who are prime contractors and/or subcontractors in county projects²². It is anticipated that \$56M or more will be available annually for Broward County certified small businesses with an estimated \$1.6B in competitive procurement opportunities over 30 years. The County uses a race- and gender-neutral County Business Enterprise (CBE) program. CBE eligibility requirements are:

- The firm must be independently owned
- The firm must have a continuing operating presence in Broward County for at least one year prior to applying
- The vendor must have a Broward Business Tax Receipt and be located in and doing business in Broward County
- Each owner must not have a personal net worth exceeding \$1,320,000
- The firm shall, when combined with any and all affiliates, have less than \$5 million in average annual gross receipts calculated over the previous three (3) calendar years, except firms in construction, which must have less than \$9 million in average annual gross receipts (calculated over the previous three years) or commodity suppliers which must have no more than 25 permanent full-time employees but are not subject to gross receipts limitations
- Completion of a site visit by Office of Economic and Small Business Development staff to the applicant firm's business location.



Figure 18. 30% for 30 Years for Broward County Certified Businesses.

²² September 25, 2018 County Commission Meeting, Agenda Item 69



Broward County’s Office of Economic and Small Business Development (OESBD)’s primary function is supporting the business community and promoting county-wide economic development. Broward County depends on the success of small businesses, which represent over 89% of its total businesses according to the 2018 US Census Business Patterns. To assure revenues generated from the transportation surtax stay in local communities and benefit local businesses, the Broward County Board of County Commissioners (Board) established a 30% small business participation goal for certified County Business Enterprise (CBE) firms for all eligible projects funded by the surtax for a 30-year period.

OESBD continues to engage with and educate our business community to highlight the opportunities generated from the surtax, which is projected to generate an average revenue of over \$300 million a year, every year, for the remainder of the 30 years! This program attracts new businesses and grows capacity of existing firms. OESBD reviews economic models, employment projections, economic growth, and other benefits of surtax investments. To date, OESBD has hosted and participating in the following initiatives:

- “Get Certified” campaign to encourage firms to do business with Broward County government
- 30% for 30 Years branding campaign to showcase opportunities available for eligible surtax-funded projects
- Virtual Surtax Information Events scheduled for the remainder of the 2020
- Radio and print advertisements to encourage the participation of local firms on County and municipal projects
- Designated staff to provide technical assistance, monitor projects and ensure compliance with the 30% for 30 Years program requirements
- Staff will conduct extensive community outreach with small businesses, municipalities, and partners in Broward County highlighting new opportunities and projects
- Local and Regional advertising to target specific industries and new businesses, and to grow capacity of existing firms to participate on eligible projects



Office of Economic and Small Business Development Activities 2019–2020

May - December 2019	January - August 2020
<ul style="list-style-type: none"> • Community outreach • 7 Business information sessions <ul style="list-style-type: none"> - Presentations - Advertising - E-blast and social media • Capital projects FY2020 – Contracting opportunities workshop, with 169 attendees and 970 views in internet platforms • Presentations in 25 community: <ul style="list-style-type: none"> - Business and Bagels events - Broward County Business Conference & Expo - NSU entrepreneur bootcamp - Conference of minority transportation officials 	<ul style="list-style-type: none"> • Over \$250 Million in surtax-funded project estimates reviewed for CBE Goals <ul style="list-style-type: none"> - 26 County Projects - 24 Municipal Projects - The average goal assigned to Municipal Projects is 34% • Partnership invitations to 31 Municipalities • Small Business Program Training to 25 Municipalities • 11 Surtax Events, including Meet & Greets/Information Sessions and Virtual Workshops • Over 47 presentations (In-Person and Virtual) • \$150 M in surtax funds approved in FY2020 is projected to create 1,488 direct jobs and have a direct economic impact of \$174.5 M <ul style="list-style-type: none"> - 395 indirect jobs and an indirect economic impact of more than \$61 million - \$53 million potential contracting opportunities for Broward County’s certified small businesses²³

Table 9. Office of Economic and Small Business Development Activities 2019–2020

Mobility Planning & Innovation

Based on discussions with other jurisdictions around the country during our 30-year plan development, funding was prioritized to allow the County to invest in testing, demonstrating, piloting, and deploying state-of-the-art transportation technologies. Resources to perform advanced data analytics using anonymized location-based data will allow us to make better decisions for improved transportation planning. After successful passage of the referendum, the County established the position of Chief Innovation Officer and established both a surtax-funded (mobility focused) and general funded (broadly looking at innovations to improve public services), Innovation and Mobility Planning Office.

Mobility Planning & Innovation Activities

- Met with nearly 100 technology vendors regarding surtax projects Trainings (2) for CBEs regarding how to participate in innovation surtax projects
- TTS roll-out real-time traffic signal data to certain makes of vehicles (August 2020)

²³ IMPLAN Model projections analysis of 244 projects approved by the Board on June 16, 2020, Agenda Item 72.



- Research and advise on Innovation District implementation.
- Use of artificial intelligence to detect near collisions for safety enhancement prioritization and to determine effectiveness
- Testing AR and VR to help visualize our transportation planning and design concepts
- Mobility Modeling (characterizes movement with respect to location, velocity, and direction over a period)
- Fine tuning complex, multi-layered, GIS Dashboard created for Oversight Board and working on public version (planned for FY2021)
- Technical, Innovation, and Planning Support to Oversight Board 3 staff hired to handle GIS, Greenways Master Plan and Mobility Modeling

Innovation Initiatives:

- A program that will allow capable vehicles to get real-time traffic signal information
- A partnership with WAZE, a real-time traffic and navigation app that will allow Broward County transportation planners and engineers access to anonymized crowdsource data to help us better understand changing traffic patterns
- A multiyear partnership to leverage vast transportation and innovation expertise in institutions of higher education to lay the framework for an Innovation District(s). The Innovation District is envisioned to service a sandbox to test technologies and identify emerging Intelligent Transportation Solutions
- State-of-the-art technology in artificial intelligence (AI) enabling Broward County to detect, count, and analyze patterns based on vehicle types and transportation mode (e.g. walk, bike, bus) in real-time, with no personally identifiable information collected or stored
- Use of augmented reality (AR) and virtual reality (VR) to enhance public understanding of the county's vision for transportation in context of existing streets
- Installation of the South East Regional Planning Model (SERPM) to analyze travel demand model and impacts of proposed surtax investments. SERPM provides information that can be used to evaluate transportation improvement alternatives and make planning decisions for maximizing investment returns in areas such as Regional and Corridor Planning, Transit Planning, Land Use Planning, etc.
- Examining future transportation use and deployment of 5G communication networks
- Creation of a dynamic web-map and dashboard for the Transportation Surtax Oversight Board to identify surtax funded projects. A publicly accessible web-map is currently in development



- Comprehensive update of the 2002 Broward County Greenways Master Plan that will identify and prioritize corridor delivery for safe, reliable, and comfortable pathways for bicyclists, pedestrians, and other non-motorized transportation
- Upcoming launch of Public Dashboard, accessible on the PennyForTransportation.com website will enable residents and business owners to quickly identify surtax-funded transportation improvements in their neighborhood

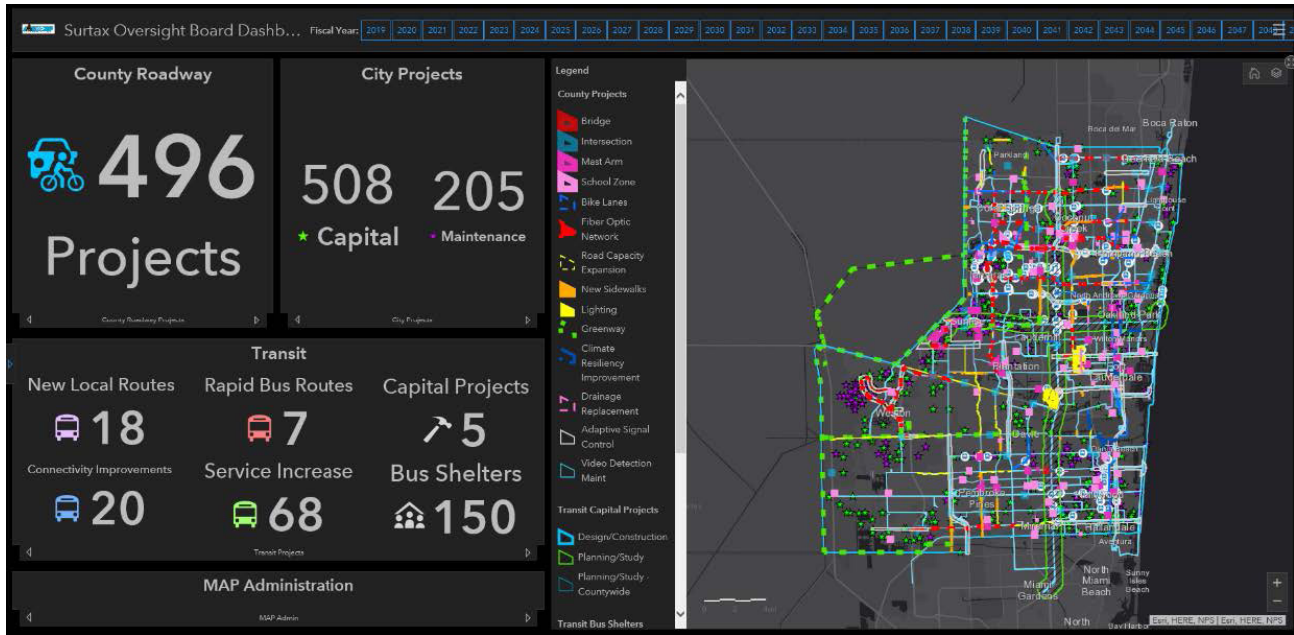


Figure 19. Multi-layered, GIS Dashboard created for the Transportation Surtax Oversight Board in 2019

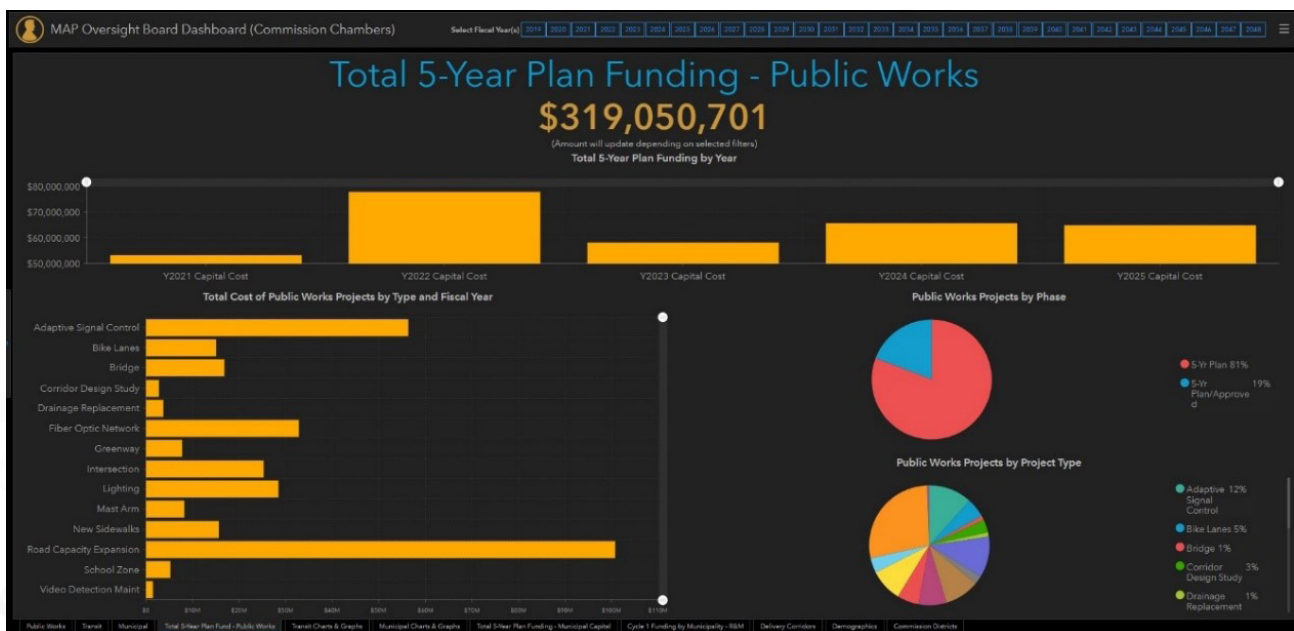


Figure 20. Multi-layered, GIS Dashboard created for the Transportation Surtax Oversight Board in 2020



Financial Overview

Surtax eligible expense categories include capital, planning, operations and maintenance, and support services.

- Capital includes new vehicles, bus shelters, new facilities, roadway/safety construction, fiber optics, adaptive signal control, intersection improvements, mast arm upgrades, road capacity expansion, school safety zone improvements, complete streets, bike lanes, sidewalks, street lighting, video detection maintenance, etc.
- Planning includes mobility-related studies, research, analyses, and surveys
- Operations and Maintenance include staffing dedicated to new surtax services and program implementation, service level improvements and operating expenses
- Support Services includes, but is not limited to: legal oversight; audits; Oversight Board and Appointing Authority support; MPO coordination and contract administration; municipal technical assistance and municipal contract management; small business outreach and capacity building; intergovernmental affairs coordination; innovations in transportation mobility and planning; data visualization; GIS and 3D modeling; community outreach; media relations; communications; branding; social media; website; focus groups; financial management, modeling and budget preparation; reporting; tracking, etc.

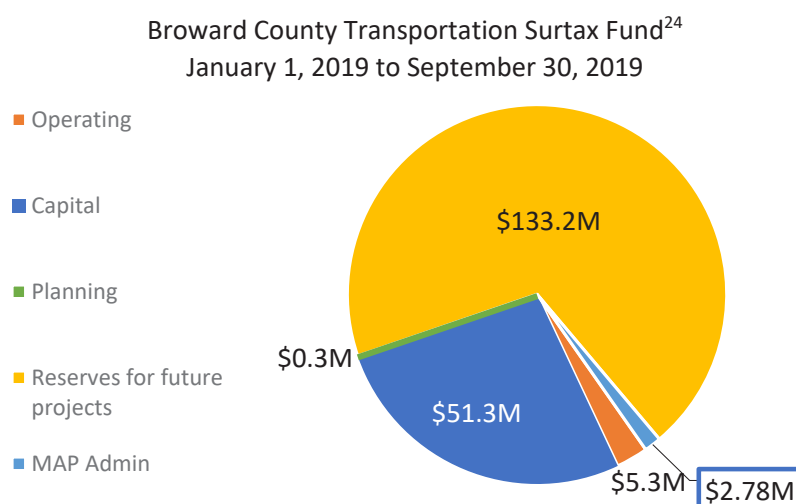


Figure 21. Transportation Surtax Fund 2019

²⁴ Includes reserves for future projects. MAP Admin capital includes one-time expenses to create public engagement space for the Oversight Board and co-location of surtax staff in Government Center West.



Broward County Transportation Surtax Fund ^{25,26}
 October 1, 2019 to September 30, 2020

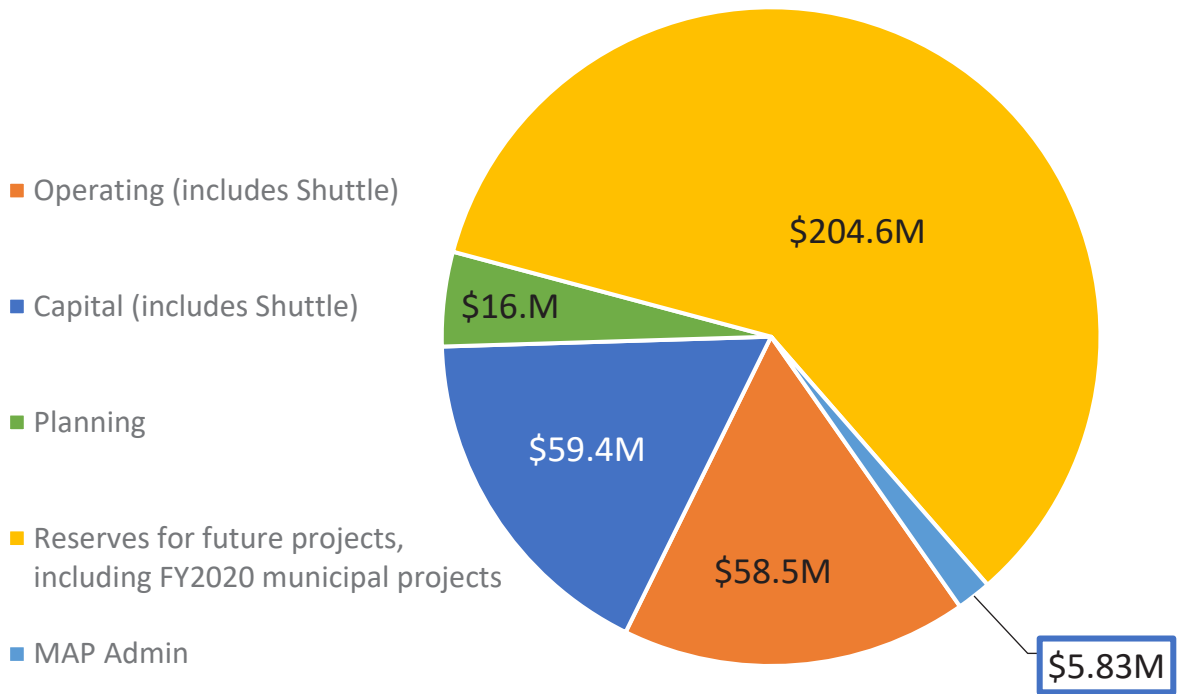


Figure 22. Transportation Surtax Fund 2020

MAP Administration (1.69% from total)	
Capital (one-time)	\$1,979,000
Operating	\$3,855,240
Total	\$5,834,240

MAP Admin capital includes one-time expenses for public engagement space in Government Center West (GCW).

²⁵ Includes reserves for future projects, including \$126.9M for Municipal Capital and Rehabilitation and Maintenance projects, and \$4.2M for contingency.

²⁶ In FY2020; a budget of approximately \$1.9M is appropriated for colocation of certain surtax staff that support the Oversight Board, and Oversight Board meeting and flexible office space, requested by Oversight Board members. https://www.broward.org/Budget/Documents/FY20/FY20%20Adopted%20Budget/FY20%20Capital.htm#page_173



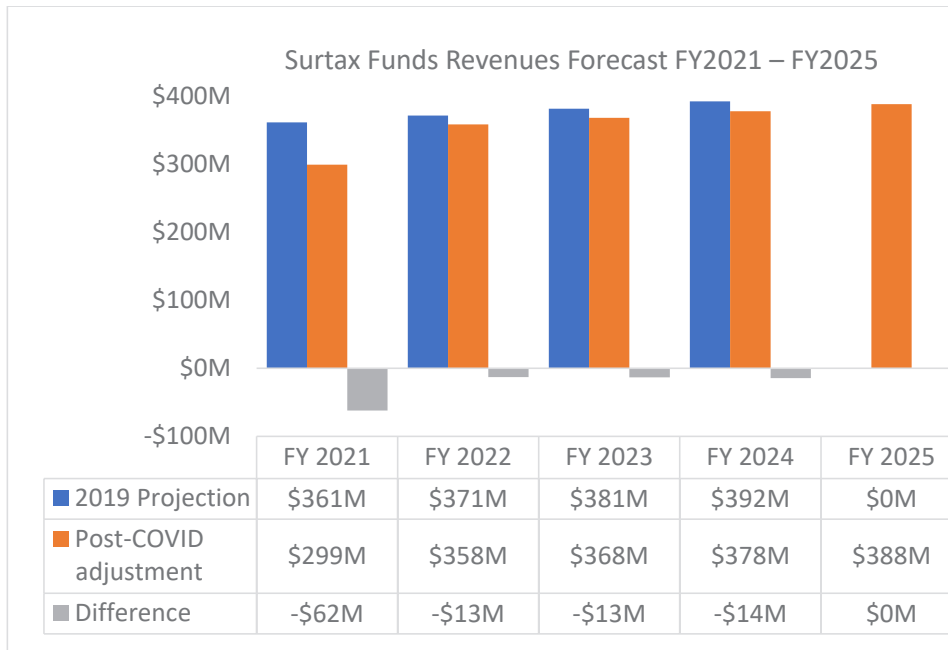


Figure 23. Surtax Fund Revenues Forecast 2021–2025.

Due to the COVID-19 pandemic, FY2020 saw over a \$62M decline over surtax revenue projections—from \$361M to \$299M. Long-term impacts to initial revenue projections remain unknown at this time.

Leveraged Funds

The Transportation Surtax Program has a long-term goal of leveraging \$2.5B in local, state, and federal funds over the 30 years. To date, Public Works surtax projects have utilized \$255,000 from other sources to design and advance projects to a “construction-ready” stage. The surtax program also allocated funds to municipal projects already in planning and/or design phases (funded by other revenue sources, all of which will be captured and documented as part of the municipal contract management process). The most significant example of federal competitive grant leverage for this reporting period has been Broward County Transit’s award of a \$17.3M federal capital grant for the construction of the Copans Road Maintenance Facility, which constitutes a 40% “match” to the \$43.7M requested in surtax funding from 2020 to 2023²⁷.

²⁷ <https://www.broward.org/PennyForTransportation/Documents/5YP%20Oversight%20Board%20Workshop%208.13.20DRAFT%208-13-2020FINAL%20Reduced%20Size.pdf>

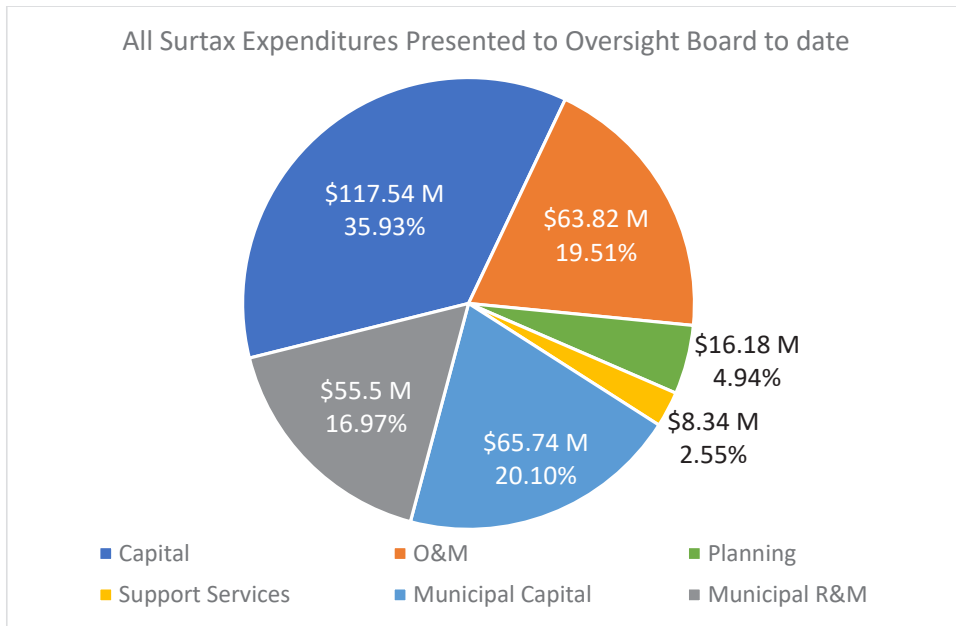


Figure 24. Surtax expenditures presented to the Oversight Board to date.

Audit Update

At the request of the Oversight Board, an independent audit of the Transportation Surtax Fund of Broward County (the Surtax Fund) was performed by accounting firm RSM US LLP, for fiscal year 2019. This was the first audit of the Surtax Fund and covered the nine-month period from January 1, 2019 (the inception date of the Surtax Fund) to September 30, 2019 (the 2019 fiscal year-end). The Surtax Fund represents a major, special revenue fund of Broward County. The Independent Auditor’s Report²⁸ was dated March 26, 2020 and an unmodified (“clean”) opinion was issued, indicating there were no findings or management comments with respect to the Surtax Fund financials. An independent audit of the County’s Transportation Surtax Fund fund-level financial statements, for fiscal year ended September 30, 2020, will be performed by RSM US, LLP. The primary objective of the audit is to express an opinion of the fair presentation of the fund financial statements of the County’s Transportation Sales Surtax Fund in accordance with accounting principles generally accepted in the United State of America. At the conclusion of the audit, RSM will deliver to the County:

- The independent auditor’s report on the Surtax Fund’s basic financial statements

²⁸ https://www.broward.org/PennyForTransportation/Documents/Broward-County-Florida-Transportation-Surtax-Fund_19-FS_FINAL.pdf
https://www.broward.org/PennyForTransportation/Documents/BrowardCountyPostAUC_260_Surtax_19_SAS%20Report_Final.pdf



- A separate management representation letter related to the Surtax Fund
- A report to the Board of County Commissioners (BOCC) and to the Independent Transportation Surtax Oversight Board

During FY2021, which covers October 1, 2020 through September 30, 2021, the Office of the County Auditor has an audit plan which includes a risk-based assessment process related to the Surtax Fund. The Office of the County Auditor has advised their work plan for fiscal 2021 will include reviews of the Broward MPO surtax funded contract, as well as the Municipal Community Shuttle Program and Broward County Transit Purchasing.

Financial Management Systems

A newly implemented project costing module in the County's PeopleSoft financial management system will provide additional accessibility and transparency with respect to Surtax Fund related activities. The project costing system will allow users to track and report on the Surtax Capital Program across all surtax-funded agencies and offer the ability to process, manage and report on all surtax fund financial and project information, centrally. Mobility Advancement Program Administration will be able to report on behalf of the Oversight Board, on all activities in the fund, including leveraged funds. Construction projects funded with the surtax will utilize a more standardized project and financial reporting approach, improving integration and reporting. Additionally, the use of Funds Distribution (FD) in the project costing module will allow for splitting project funding on the back end, minimizing errors. There will also be a Project WorkCenter in the project costing module that provides centralized access to surtax staff and the administrator to facilitate tracking, monitoring, and reporting of all surtax-related financial data.



Five-Year Plan: FY2021–2025

A collaborative Five-Year plan containing County and municipal capital projects, as well as support and planning services expected, was presented to, and approved by the Oversight Board on August 14, 2020, based on the FY2021 Broward County Recommended Capital Budget.²⁹

Projects included in the Five-Year Plan will be funded starting with Cycle 2, FY2021, through Cycle 6, FY2025. Should additional funding be available in any given year of the Five-Year Plan, projects may be added.

Transit

BCT's Five-Year Plan includes the continuation of transit improvements including service increase, new vehicles and amenities in fixed routes and paratransit, continuing implementation of Light Rail Transit (LRT) and Bus Rapid Transit (BRT) projects, and traffic infrastructure county-wide and for regional development.

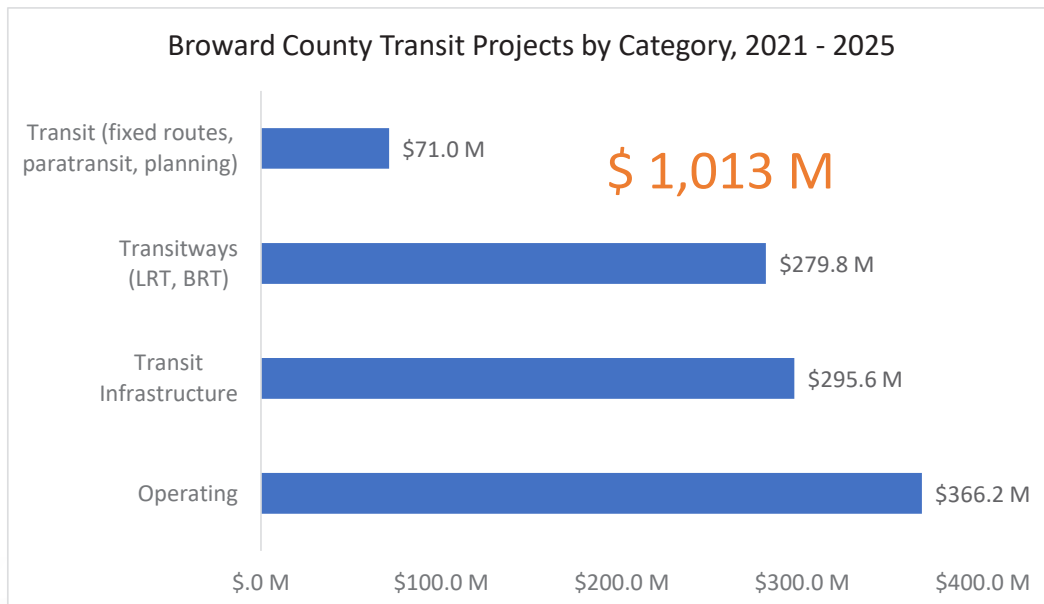


Figure 25. Broward County Transit projects, 2021-2025

²⁹ <https://www.broward.org/Budget/Documents/FY21/FY21RecCapitalBudget.html>



Public Works

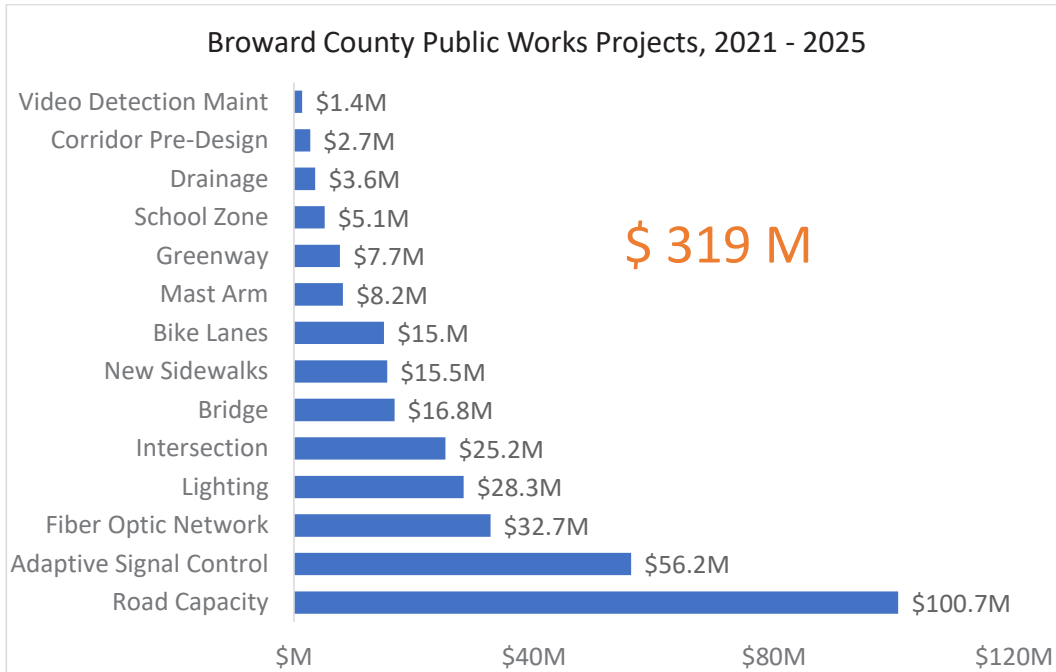


Figure 26. Broward County Public Works projects, 2021-2025.

Municipal Capital Projects

The Municipal Five-Year Plan includes recommended funding for subsequent phases of capital projects approved by the County Commission in Cycle 1 (2020) for planning and design phases. This Five-Year Plan acts as the basis for annual surtax funding appropriations and offers recipients of surtax funds a level of certainty in long-range programming and planning for transportation projects and surtax revenues. It includes funding for 32 projects, 30 of which will be fully funded. The criteria for inclusion in the Five-Year Plan was the project’s ranking and the expected availability of funds. (For more details, view Appendix on page 48: Municipal Five-Year Plan).

Notably, this list includes some multi-year “big ticket” projects such as Pembroke Road and Miramar Parkway Expansion, which is expected to cost between \$49M to \$93M. This project is currently in its design phase. For larger dollar-value projects, the annual cap on funding was set at \$11M, since it is highly unlikely that a construction project can spend down more than that amount in any given year.



Should additional revenues be available in any given year of the Five-Year Plan, projects may be added to, and may, at the request of the applicable municipality, be deleted from, the Five-Year Plan on an annual basis. Consideration will be given to those municipalities not approved for funding in Cycle 1 or the Five-Year Plan to ensure projects are evenly dispersed throughout the County. Similarly, funding for eligible R&M projects could be considered once community shuttle and capital projects have been fully funded in any given cycle.

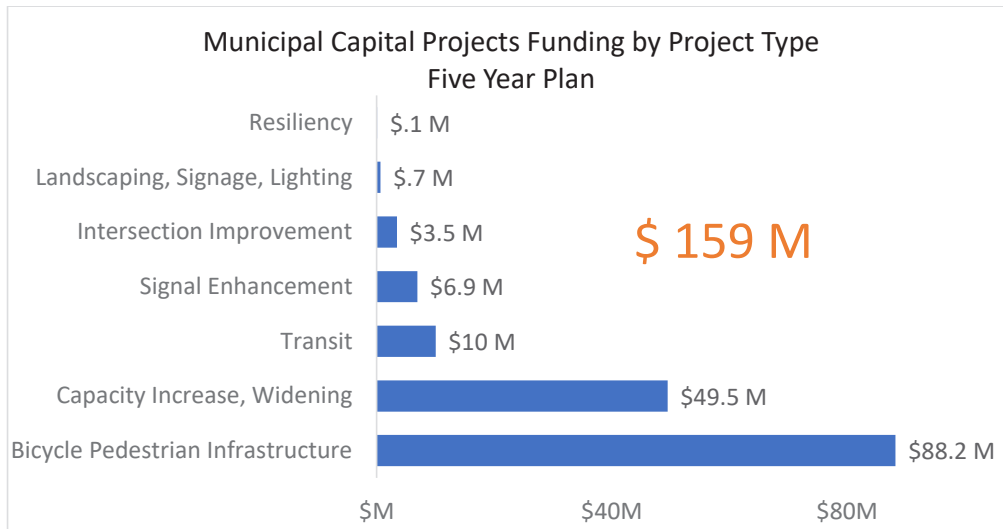


Figure 27. Municipal Projects, 2021-2025

Office of Economic and Small Business Development

2021 Regional (South Florida)	2022 Statewide	2023 – 2025 Out of State
<ul style="list-style-type: none"> Advertising: radio, digital, social media, print ads, industry publications Outreach: events, conferences, partnerships Staffing: Small Business Specialist and PT19 (Data Collection) 	<ul style="list-style-type: none"> Advertising: radio, digital, social media, print ads, industry publications Outreach: events, conferences, partnerships, meet and greet Staffing: Small Business Specialist (Compliance) 	<ul style="list-style-type: none"> States with industries not in Broward County or Florida States with transit contracts in Broward Advertising: radio, digital, social media, print ads, industry publications Outreach: conferences, partnerships, meet and greet Staffing: Economic Development Specialist & Small Business Specialist

Table 10. Office of Economic and Small Business Development Planned Activities 2021-2025



Appendix

SURTAX MUNICIPAL CAPITAL PROJECTS FIVE YEAR PLAN FY 2021 - FY 2025											
Rank	Municipality	Project ID	Cost Estimate	PHASE	(1) FY 2020	(2) FY 2021	(3) FY 2022	(4) FY 2023	(5) FY 2024	(6) FY 2025	> FY 2025
34-37	Miramar	Multiple	\$ 49,416,667- \$93,000,000	Design	\$ 5,930,000						
34-37	Miramar	Multiple	\$ 49,416,667- \$93,000,000	ROW	\$ 3,500,000						
34-37	Miramar	Multiple	\$ 49,416,667- \$93,000,000	Construction				\$ 10,000,000			
34-37	Miramar	Multiple	\$ 49,416,667- \$93,000,000	Construction					\$ 10,000,000	\$ 10,000,000	\$9,986,667- \$53,570,000
38 & 88	Fort Lauderdale	FORT-108 / 113	\$ 6,500,000	Planning	\$ 195,000						
38 & 88	Fort Lauderdale	FORT-108 / 113	\$ 6,500,000	Design		\$ 780,000					
38 & 88	Fort Lauderdale	FORT-108 / 113	\$ 6,500,000	Construction				\$ 2,762,500	\$ 2,762,500		
39	Oakland Park	OAKL-023	\$ 7,875,000	Design	\$ 945,000						
39	Oakland Park	OAKL-023	\$ 7,875,000	Construction		\$ 6,930,000					
40	Coral Springs	CORA-097	\$ 20,000,000	Planning	\$ 600,000						
40	Coral Springs	CORA-097	\$ 20,000,000	Design		\$ 250,000					
40	Coral Springs	CORA-097	\$ 20,000,000	Construction				\$ 9,450,000			
40	Coral Springs	CORA-097	\$ 20,000,000	Design					\$ 250,000		
40	Coral Springs	CORA-097	\$ 20,000,000	Construction						\$ 9,450,000	
41	Coconut Creek	COCO-024	\$ 3,600,000	Design	\$ 432,000						
41	Coconut Creek	COCO-024	\$ 3,600,000	Construction		\$ 3,168,000					
42	Pompano Beach	POMP-002	\$ 24,860,000	Design	\$ 2,983,200						
42	Pompano Beach	POMP-002	\$ 24,860,000	Construction				\$ 10,938,400	\$ 10,938,400		
43	Hollywood	HOLL-036	\$ 1,000,000	Design	\$ 120,000						
43	Hollywood	HOLL-036	\$ 1,000,000	Construction		\$ 880,000					
44	Davie	DAVI-016	\$ 3,000,000	Design	\$ 360,000						
44	Davie	DAVI-016	\$ 3,000,000	Construction		\$ 2,640,000					



Rank	Municipality	Project ID	Cost Estimate	PHASE	(1) FY 2020	(2) FY 2021	(3) FY 2022	(4) FY 2023	(5) FY 2024	(6) FY 2025	> FY 2025
45	Miramar	MIRA-021	\$ 3,000,000	Planning	\$ 90,000						
45	Miramar	MIRA-021	\$ 3,000,000	Design			\$ 360,000				
45	Miramar	MIRA-021	\$ 3,000,000	Construction				\$ 2,550,000			
46	Pembroke Pines	PPIN-039	\$ 4,431,250	Planning	\$ 132,938						
46	Pembroke Pines	PPIN-039	\$ 4,431,250	Design			\$ 531,750				
46	Pembroke Pines	PPIN-039	\$ 4,431,250	Construction				\$ 3,766,563			
47	West Park	WPRK-002	\$ 750,000	Design	\$ 90,000						
47	West Park	WPRK-002	\$ 750,000	Construction		\$ 660,000					
48	Lauderdale Lakes	LLAK-006	\$ 850,000	Planning	\$ 25,500						
48	Lauderdale Lakes	LLAK-006	\$ 850,000	Design			\$ 102,000				
48	Lauderdale Lakes	LLAK-006	\$ 850,000	Construction				\$ 722,500			
49	Wilton Manors	WILT-009	\$ 6,000,000	Planning	\$ 180,000						
49	Wilton Manors	WILT-009	\$ 6,000,000	Design			\$ 720,000				
49	Wilton Manors	WILT-009	\$ 6,000,000	Construction				\$ 5,100,000			
50	Sunrise	SUNR-055	\$ 4,500,000	Design	\$ 540,000						
50	Sunrise	SUNR-055	\$ 4,500,000	Construction					\$ 3,960,000		
51	Pembroke Park	PPRK-010	\$ 250,000	Design	\$ 30,000						
51	Pembroke Park	PPRK-010	\$ 250,000	Construction		\$ 220,000					
52	Lauderdale-by-the-Sea	LSEA-005	\$ 2,000,000	Design	\$ 240,000						
52	Lauderdale-by-the-Sea	LSEA-005	\$ 2,000,000	Construction		\$ 1,760,000					
53	Weston	WEST-303	\$ 4,900,000	Design	\$ 588,000						
53	Weston	WEST-303	\$ 4,900,000	Construction			\$ 4,312,000				
54	Deerfield Beach	DEER-007	\$ 4,000,000	Design	\$ 480,000						
54	Deerfield Beach	DEER-007	\$ 4,000,000	Construction			\$ 3,520,000				



Rank	Municipality	Project ID	Cost Estimate	PHASE	(1) FY 2020	(2) FY 2021	(3) FY 2022	(4) FY 2023	(5) FY 2024	(6) FY 2025	> FY 2025
66	Hollywood	HOLL-038	\$ 5,000,000	Planning	\$ 150,000						
66	Hollywood	HOLL-038	\$ 5,000,000	Design					\$ 600,000		
66	Hollywood	HOLL-038	\$ 5,000,000	Construction						\$ 4,250,000	
67	Miramar	MIRA-020	\$ 1,200,000	Design	\$ 144,000						
67	Miramar	MIRA-020	\$ 1,200,000	Construction					\$ 1,056,000		
68	Lauderdale Lakes	LLAK-016	\$ 500,000	Planning	\$ 15,000						
68	Lauderdale Lakes	LLAK-016	\$ 500,000	Design					\$ 60,000		
68	Lauderdale Lakes	LLAK-016	\$ 500,000	Construction						\$ 425,000	
69	Sunrise	SUNR-075	\$ 3,250,000	Design	\$ 390,000						
69	Sunrise	SUNR-075	\$ 3,250,000	Construction						\$ 2,860,000	
71	Davie	DAV-I-012	\$ 2,000,000	Design	\$ 240,000						
71	Davie	DAV-I-012	\$ 2,000,000	Construction					\$ 1,760,000		
Totals					\$ 24,259,487	\$ 19,758,000	\$ 15,137,346	\$ 55,941,083	\$ 31,636,900	\$ 36,435,000	

Revenues for Municipal Projects	\$ 26,310,130	\$ 32,082,900	\$ 32,938,000	\$ 33,815,860	\$ 34,717,070	\$ 159,863,960
Previous balance	\$ 6,552,130	\$ 23,497,684	\$ 494,602	\$ 2,673,562	\$ 37,390,632	
Total funds available	\$ 26,310,130	\$ 38,635,030	\$ 56,435,684	\$ 34,310,462	\$ 37,390,632	
Balance (Revenues + balance - Year total):	\$ 6,552,130	\$ 23,497,684	\$ 494,602	\$ 2,673,562	\$ 955,632	



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Independent Transportation Surtax Oversight Board meetings are broadcast live and can be found on:

 [PennyForTransportation.com](https://www.pennyfortransportation.com)

 @BrowardMobility

 Email inquiries should be sent to:
PennyForTransportation@broward.org

