Tampa Bay Regional Planning Council

Council Minutes

August 13, 2012
10:00 a.m.

REPRESENTATIVES PRESENT
Chair, Commissioner Larry Bustle, Manatee County
Vice Chair, Mayor Bob Minning, City of Treasure Island
Secretary/Treasurer, Mr. Andy Núñez, Pinellas County Gubernatorial Appointee
Mayor David Archie, City of Tarpon Springs
Vice Mayor Ron Barnette, City of Dunedin
Commissioner Neil Brickfield, Pinellas County
Commissioner Woody Brown, City of Largo
Commissioner Lorraine Huhn, City of St. Pete Beach
Mr. Robert Kersteen, Pinellas County Gubernatorial Appointee
Mr. Harry Kinnan, Manatee County Gubernatorial Appointee
Councilwoman Mary Mulhern, City of Tampa
Commissioner Gail Neidinger, City of S. Pasadena
Council Member Wengay Newton, City of St. Petersburg
Councilman Patrick Roff, City of Bradenton
Mr. Tim Schock, Hillsborough County Gubernatorial Appointee
Ms. Barbara Sheen Todd, Pinellas County Gubernatorial Appointee
Ms. Kim Vance, Hillsborough County Gubernatorial Appointee
Mr. Charles Waller, Pasco County Gubernatorial Appointee
Mr. Waddah Farah, Alt., Ex-Officio, Florida Department of Transportation
Ms. Michelle Miller, Ex-Officio, Enterprise Florida
Mr. Todd Pressman, Ex-Officio, Southwest Florida Water Management District

REPRESENTATIVES ABSENT
Commissioner Nina Bandoni, City of Safety Harbor
Mayor Shirley Groover Bryant, City of Palmetto
Commissioner Scott Black, City of Dade City
Commissioner Victor Crist, Hillsborough County
Past Chair, Commissioner Bill Dodson, City of Plant City
Vice Mayor Sam Henderson, City of Gulfport
Council Member Doreen Hock DiPolito, City of Clearwater
Council Member Alison Fernandez, City of Temple Terrace
Ms. Angeleah Kinsler, Hillsborough County Gubernatorial Appointee
Councilman Bob Langford, City of New Port Richey
Commissioner Jack Mariano, Pasco County
Councilor Bob Matthews, City of Seminole
Council Member Janice Miller, City of Oldsmar
Councilman Ed Taylor, City of Pinellas Park
Mr. Gary Wishnatzki, Hillsborough County Gubernatorial Appointee
Ms. Pamela Vazquez, Ex-Officio, Department of Environmental Protection

OTHERS PRESENT
Eric Johnson, Legislative Aide to Commissioner Crist
Jason Mickel, Sr. Planner, SWFWMD
Elba Lopez, FDOT, District 7
Mike Williamson, Principal, Cambridge Systematics
Dan Aldridge

STAFF PRESENT
Mr. Manny Pumariega, Executive Director
Mr. Donald Conn, Legal Counsel
Ms. Suzanne Cooper, Principal Planner
Ms. Lori Denman, Recording Secretary
Mr. John Jacobsen, Accounting Manager
Ms. Betti Johnson, Principal Planner
Ms. Jessica Lunsford, Senior Planner
Mr. John Meyer, Principal Planner
Mr. Patrick O'Neil, Senior Planner
Mr. Brady Smith, Senior Planner
Mr. Avera Wynne, Planning Director

Call to Order – Chair Bustle
The August 13, 2012 regular meeting of the Tampa Bay Regional Planning Council (TBRPC) was called to order at 10:06 a.m.

The Invocation was given by Councilman Wengay Newton, followed by the pledge of allegiance.

Roll Call -- Recording Secretary
A quorum was present.

Voting Conflict Report -- Recording Secretary - None

Announcements: - Chair Bustle

- Councilor Matthews was thanked for providing this morning's refreshments.

- Chair Bustle thanked the City of Oldsmar for being the first to pass a resolution in support of RPC state funding. The City of Tarpon Springs and Manatee County also passed resolutions of support. The resolutions were sent to the Governor. Copies of the resolutions were distributed in Council folders. Chair Bustle asked that if any other municipality passes a resolution in support of RPC funding to please forward a copy to Manny Pumariega.

1. **Approval of Minutes** – Secretary/Treasurer, Mr. Andy Núñez
   The minutes from the June 4, 2012 regular meeting were approved. (Todd/Kersteen)

2. **Budget Committee** – Secretary/Treasurer, Mr. Andy Núñez
   A. The Financial Report for the period ending 5/31/12 was approved. (Kersteen/Brown)
   B. The Financial Report for the period ending 6/30/12 was approved. (Kinnan/Archie)

3. **Consent Agenda** – Chair Bustle
   A. Budget and Contractual - None

B. Intergovernmental Coordination & Review (IC&R) Program

1. IC&R Reviews by Jurisdiction - June & July 2012
2. IC&R Database - June & July 2012

Action Recommended: None. Information Only.
Staff contact: John Meyer, ext. 29

3. IC&R #050-12 - Hillsborough County MPO 2012/13 - 2016/17 Transportation Improvement Program
4. IC&R #051-12 - Pasco County MPO 2011/12 - 2015/16 Transportation Improvement Program
5. IC&R #052-12 - Draft Environmental Impact Statement on Phosphate Mining in the Central Florida Phosphate District, FSC SAI #FL201205296249C
6. IC&R #053-13 - Overpass Road PD&E Study: Old Pasco Road to U.S. 301, FSC SAI #FL201206296287C, Pasco County
7. IC&R #060-12 - Pasco County MPO 2012/13 - 2013/14 Unified Planning Work Program

C. DRI Development Order Reports (DOR) - None

D. DRI Development Order Amendment Reports (DOAR)

Due to statutory and contractual requirements, the following Reports have been transmitted to the State Land Planning Agency and all relevant review agencies in accordance with Rule 29H-1.003(3), F.A.C.:

1. DRI #145 - Southbend, Hillsborough County
2. DRI #157 - Trinity Communities, Pasco County

Recommended Action: None. Information Only.
Staff Contact: John Meyer, ext. 29

E. Notice of Proposed Change Reports (NOPC)

Due to statutory and contractual requirements, the following Report has been transmitted to the State Land Planning Agency and all relevant review agencies in accordance with Rule 29H-1.003(3), F.A.C.:

DRI #202 - Unnamed Exclusive Golf & Country Club, Manatee County

Recommended Action: None. Information Only.
Staff contact: John Meyer, ext. 29

F. Annual Report Summaries (ARS) / Biennial Report Summaries (BRS)

1. DRI #95 - Wingate Creek Mine, RY 2011-12 ARS, Manatee Country
2. DRI # 97 - St. Petersburg Intown Areawide, RY 2011-12 ARS, City of St. Petersburg
3. DRI #102 - Creekwood, RY 2010-11 ARS, Manatee County
4. DRI #114 - Tampa Oaks, RY 2011-12 ARS, City of Temple Terrace
5. DRI #141 - Westshore Areawide, RY 2011-12 ARS, City of Tampa
6. DRI #170 - Westfield Citrus Park Mall, RY 2011-12 ARS, Hillsborough County
7. DRI #190 - University Commons, RY 2011-12 ARS, Manatee County
8. DRI #195 - Gateway Areawide, RY 2011-12 ARS, City of St. Petersburg
9. DRI #226 - Busch Gardens Substantial Deviation, RY 2011-12 ARS, City of Tampa
10. DRI #246 - Suncoast Crossings, RY 2011-12 ARS, Pasco County

Recommended Action: Approve staff reports
Staff contact: John Meyer, ext. 29

G. DRI Status Report
Action Recommended: None. Information Only.
Staff contact: John Meyer, ext. 29

H. Local Government Comprehensive Plan Amendments (LGCP)
Due to statutory and contractual requirements, the following reports have been transmitted to the State Land Planning Agency and the appropriate local government in accordance with Rule 29H-1.003(3), F.A.C.
For adopted amendments that do not require Council comments, no report is attached.

1. DEO # 12-1ESR, City of St. Pete Beach (proposed)
2. DEO # 12-1ESR, Hillsborough County (adopted
3. DEO # 12-1ESR, City of Safety Harbor (adopted)
4. DEO # 12-3ESR, Pasco County (adopted)
5. DEO # 12-2ESR, City of Plant City (proposed)
6. DEO # 12-5ESR, Pasco County (proposed)
7. DEO # 12-2ESR, City of Tarpon Springs (adopted)
8. DEO # 12-2ESR, Hillsborough County (proposed)
9. DEO # 12-1ESR, City of Temple Terrace (proposed)
10. DEO # 11-1ESR, Pasco County (proposed)

Action Recommended: None. Information Only.
Staff contact: Jessica Lunsford, ext. 38

I. Local Government Comprehensive Plan Amendments (LGCP)
The following report(s) are presented for Council action: - None

Motion to approve the Consent Agenda. (Kersteen/Mulhern)

4. Item(s) Removed from Consent Agenda and Addendum Item(s) - None

5. Review Item(s) or Any Other Item(s) for Discussion

6. Florida Trade and Logistics Study
Michael Williamson, Cambridge Systematics presented findings of the initial Florida Trade and Logistics Study that was commissioned by Florida Chamber Foundation and the Florida Department of Transportation. Florida has long been an important consumer market and a gateway for trade between the United States and Latin American/Caribbean nations. Over the next decade, several trends will position Florida for a larger, more commanding role as a trade hub. Mr. Williamson will introduce concepts that will be explored during the next phase of the study that will begin this fall.

How important is international trade to the State of Florida? What are some of our key opportunities for expanding our role in international trade? How will we achieve our goals? What is next? The Study was completed by the Florida Chamber Foundation in December 2010. It was a unique partnership with a series of public and private partners that were brought together to achieve these four objectives. One was to understand what is moving today as far as international trade is concerned, how much do we expect that to increase over the next 20-30 years, and based on that, what type of opportunities exist for Florida to take its next step in improving and investing in its transportation and economic development infrastructure to help grow international trade. And, ultimately come up with strategies on how we go about doing that.

It is important for folks to understand just how important trade is today. Over 1 million jobs in Florida today are dependent on international business. Over 55,000 of our businesses are due to export products or services. The majority of those are small or medium sized businesses. We have a

huge amount of tourism, 85.9 million total visitors in 2011 with an economic impact of over $60 billion dollars and direct employment of 1,013,000 Floridians. Last year Florida had 8 million overseas and 3.1 million Canadian visitors.

Florida ranked 7th in exporting agricultural commodities with a value of more than $1 billion. The state ended 2011 at record levels with $64.8 billion in Florida-origin exports. Annual growth was 17% higher than 2010, adding nearly $9.4 billion in new export sales. The state grew somewhat faster than the U.S. overall (17%) and maintains its ranking as the fourth largest U.S. export state. Foreign companies employ 245,000 Floridians.

Why focus on trade? Trade is expected to grow faster than the U.S. economy as a whole. The combined value of U.S. imports and exports is equivalent to 24 percent of the U.S. real gross domestic product. As the economy as a whole grows, by 2035 we anticipate that international trade is going to be more than half of our economy. If we are not in a position to have that infrastructure in place to support the growth of international trade in the State of Florida, then we will be behind the eight ball compared to the rest of the country.

Changing global trading patterns favor Florida. One of our major trade routes is moving back and forth between the east coast and Europe; from eastern Asia to the west coast is a major route. What we anticipate happening with the completion of the Panama Canal is the ability of trade coming from eastern Asia and how much of that trade can we capture in Florida as major shipping lines make a decision between Gulf Coast ports and Atlantic/eastern ports. The other thing that we expect to be a major impact is as manufacturing centers in Asia ship south, the Suez Canal becomes a more viable route for Asian trade in coming to the U.S., which means ports on the east coast need to be prepared to handle that trade. One of our largest trading partners from the state's perspective is the Caribbean and Central and South America. We expect the north/south flows to continue to be the majority of our trade with markets like Brazil and Columbia.

When you look at the makeup of our workforce today there is over ½ million jobs in the state, as of 2009, that represent jobs in the trade and logistics industries. This represents 7.0 percent of all jobs in Florida, down slightly from 7.2 percent in 1999. The average wage in these industries was $54,714, about 29 percent higher than the average for all jobs in the state. Each job in Florida's trade and logistics cluster supports about two other jobs in the state's economy. When you see how we compare to some of our competitors in Georgia, they have almost 9 percent of their workforce in trade and logistics. We are pretty much average with the U.S. - just a little below the 7.2 percent. If we are going to make significant investments in our infrastructure we need to have the workforce in place to handle that.

We already have a lot of investments in the state. In fact, Florida is already a global hub. We have a large number of trade zones, our transportation infrastructure includes 19 commercial airports and one of the largest air cargo airports in the world (Miami International), 14 deepwater seaports that can handle a lot of cargo both in aggregate as well as containers, we are a cruise capital of the world with multiple ports and the list goes on and on. One of the questions of this study was to figure out what else needs to be done.

Looking at Florida's strengths today, we have a large consumer market, almost 19 million residents and 81 million visitors per year consume products and services that we need to have in place. We are a strategic location from an international perspective when it comes to north/south and east/west trade routes. Florida is in a dominant position for north/south trade. Florida accounts for more than 25 percent of the value of all U.S. trade with the Caribbean, and more than 35 percent with Central and South America. Florida has extensive transportation infrastructure, all modes - commercial airports, deepwater seaports, 1,500 miles of navigable waterways, 2,800 miles of rail lines, 12,000 miles of

state highways, etc.

Weaknesses are inbound trade flows are 80 percent larger than outbound today, due to a combination of a large consumer market and small manufacturing base. Nearly half of all trucks, rail cars, ships, planes return empty which adds to the cost of doing business. A lot of folks see a poor location for domestic distribution because we are far from other U.S. markets, but factoring in the global trade lanes puts us at the center of the hemisphere. We also have limited penetration with Asia and Europe as far as who our ports are receiving products from today. Overall the transportation system faces capacity constraints in all modes.

The first phase of the Study came up with three key opportunities:

1. Capture larger share of Asian imports to Florida through Florida seaports and airports. We did an analysis of international trade data and what we found out is that there is a large percentage of our imports, particularly from Asia, are not coming in through our ports. They are coming in to L.A. Longbeach and then coming across the country on rail or trucks or they are coming in to a port like Savannah and being trucked into our state. All of the value added for those containers is being done outside of the state. We want to do a better job of capturing that market.

2. Expand Florida origin exports. That lines up well with President Obama's goals as well as Governor Scott, and the Florida Chamber. All three of these entities have endorsed doubling our exports over a five year period.

3. Expand Florida's role as a global trade hub serving other states and nations. If we can capture some of our own trade and grow our own industrial base to help support those flows, then the bigger picture is, how do we really help Florida become a global trading hub, not just for the U.S. but for the world?

Nearly 75 percent of the containerized cargo exports originating in the state (based on Piers data) move through Florida seaports. 55-60 percent of all of our imports are either being handled by west coast ports, Savannah, north New York/Northern New Jersey or other ports outside of our state. That is one of the key things that we want to do a better job handling moving forward, which represents 1.3 million containers. Port Everglades and Miami are the dominant seaports, followed by Jacksonville in terms of handling exported containerized cargo originating in Florida. More than 85 percent of the exports from Florida seaports are destined for the Caribbean, Central and South America. Florida seaports handle about 55 percent of the imported containerized cargo consumed in Florida, a substantially smaller share than the Florida exported containerized cargo handled by Florida seaports.

One of the key trends in recent years has been the growth in Florida origin exports, goods produced at Florida factories, farms and mines, and sold worldwide. The value of Florida origin exports nearly doubled in constant dollars, from $29 billion in 2003 to $54 billion in 2008, and back on a growth track increasing to more than 64 million in 2011. The Florida Chamber, Enterprise Florida, and other partners have called for the state to double the value of Florida origin exports during the next five years.

We have made significant investments in our transportation infrastructure over the last few years, with more on the way. At the Port of Tampa the cross-town-connector is under construction, the Gateway Rail project which will provide one of the only on-dock rail operations in the state, major re-investments are taking place at the petroleum terminal infrastructure. At Port Miami, they will have 50 feet of water with their deep dredge, they are bringing rail service back with a rail tunnel being

built. Port Everglades has similar investments underway and plans, as well as the Port of Jacksonville.

The report identifies direct trade opportunities which could create up to 32,000 jobs in transportation, warehousing and related logistics activities such as moving freight at airports, seaports, rail and trucking, storing freight, and serving those industries such as customs brokers. Even more important we can add to our economy because we are moving more trade. If we double exports of Florida goods, and double the amount of discretionary cargo destined for other states, we are looking at up to 111,000 jobs in sectors like advanced manufacturing, final assembly, supply chain management and related services. The economic impacts on a state level are significant: $21.5 billion in business sales, $7.9 billion in personal income, and $723 million in state and local tax revenues.

There are seven (7) key critical actions:

- Support the leadership of the Governor as Florida's economic development officer and trade ambassador to market Florida as a trade and logistics hub and to attract business investment to the state. This study came out before Governor Scott took office and he certainly has looked up to the challenge.
- Expedite plans to create at least one seaport with 50 feet of channel depth for the large vessels that will be coming through the Panama Canal. As mentioned, the dredging is underway at Port Miami. We aren't saying we only need one port with 50 feet of channel, by 2014 we would like to have at least one in place which is going to happen.
- Identify global trade and logistics as a statewide targeted industry and a focus area for Enterprise Florida, Workforce Florida, the Florida Department of Transportation, and other state agencies. For those of you who monitor legislative actions, in 2011, transportation and logistics was added to your targeted industry list. It is now eligible for the various economic incentives that the state has to offer.
- Continue efforts to double the value of Florida origin exports over the next five years, focusing on maintaining and expanding our role as a global cargo route.
- Miami is one of the leading air cargo hubs in the world and we also need to look for the potential of additional cargo hubs throughout the state. There are several airports looking for the opportunity to grow and expand their cargo operations.
- Developing an integrated statewide network of trade gateways, logistics centers, and freight corridors through Florida's Strategic Intermodal System. We have CSX in Winter Haven, and there are other proposals throughout the state with folks trying to find that inland location where all this growth in international trade can go there for manufacturing, warehouse distribution, repackaging, etc. That's a key part in moving forward.
- Provide sufficient and reliable funding for future state investments in Florida's trade, transportation, and economic development systems.

Based on the Six Pillars that the Florida Chamber monitors, you can see whether it is Talent Supply & Education or Innovation & Economic Development, etc. Some career academies have been put in place under Talent Supply and there are a lot of regional studies underway, both by MPOs around the state as well as private developers looking to develop the intermodal district centers. The 2060 Florida Transportation Plan has also identified the need for a robust intermodal transportation system.

The new Department of Economic Opportunity has a five year plan that will be adopted soon and will help define what the state will be doing from an economic development standpoint. The Florida Department of Transportation is working hard on its future corridors program to look at what additional connectivity and corridors it can have in place, whether its redevelopment or new corridors. The DOT has also reorganized, they now have an office of Trade & Logistics & Passenger Operations

in Tallahassee and they are currently working to develop their first Trade Mobility and Trade Plan. A lot of you may be invited to attend their listening sessions they are scheduling around the state over the next month or two. Strategic Funding initiatives has been a lot of effort out of the legislative actions of 2012 to create new funding pots for investments within the transportation system. As mentioned, the Intermodal Logistic Centers, they actually designated a program to provide $5 million a year to help those folks who are trying to develop those facilities actually get that work underway.

Lastly, if you look at what we are trying to do for the second phase of the Study, we are looking to build off the first phase to identify some of the specific opportunities: to identify specific opportunities for Florida to become a global hub for trade, logistics, and export oriented manufacturing; develop an implementation plan including specific policy changes and investments needed to accomplish this vision; and, continue to build consensus among public and private partners in support of this vision and its implementation.

Trade & Logistics Phase II Scope, Stage 1 Initial Findings:

1. Establish Study Review Committee
2. Examine Florida's global trade opportunities
3. Identify potential policy and investment changes needed to pursue the key market opportunities
4. Develop a brief prospectus describing each global trade opportunity and the suggested strategies for pursuing that opportunity
5. Prepare a summary of initial findings and preliminary strategies for presentation at the Future of Florida Forum October 8-9, 2012. This will involve developing a Study Review Committee and looking at what our key opportunities are. Identifying policy and investment changes that may need to be put in place. And, developing some brief perspective materials on each of those opportunities to help further engage our stakeholders at the Future of Florida Forum.

Following that, there are several things that we will need to do over the next 6-9 months:

6. Conduct supply chain analyses to see how Florida compares to competitor locations.
7. Identify potential changes to incentive, tax, regulatory, workforce, and other business support services.
8. Identify infrastructure needs and potential impacts.
9. Develop a regional framework for location of future trade, transportation, and economic development investments.
10. Convene a workshop with the Study Review Committee to review the findings of tasks 6 through 9 and discuss recommendations for the final report.
11. Develop a final report and implementation plan.
12. Support study rollout.

<u>Questions & Comments:</u>

Councilman Newton:	Is this an alternative to Florida being a tourist state?
Mr. Williamson:	Obviously Florida's economy right now is being driven by agriculture and tourism. The goal is not to replace tourism or agriculture but to better balance our overall economy by bringing in and dealing with international trades more effectively.
Ms. Vance:	How do the port authorities participate in your studies? Are they members? Do you talk to them?
Mr. Williamson:	Yes. In the first stage we went out and conducted a large number of stakeholder interviews and we interviewed the individual seaports, both their planning staff and their executive directors. We briefed the Florida Ports Council and some of them actually sat on the advisory committee during the first phase and I would expect some to be involved in the second phase. They

have been engaged and supportive of the overall process.

Ms. Todd: I am assuming Cambridge is up near Boston, your offices?

Mr. Williamson: Cambridge Systematics is headquartered in Cambridge, Massachusetts. I am based in Fort Lauderdale. We also have offices in Tallahassee.

Ms. Todd: I'm curious, did the Foundation fund this initiative, or did the state, or who?

Mr. Williamson: The first phase was funded by a combination of the Florida Chamber Foundation and the Florida Department of Transportation. The Florida Chamber Foundation typically goes out and raises funds so they had several of the developers throughout the state and various folks who contributed money.

Councilman Roff: Prior to the recession there was discussion of a creation of a new freight airport to the east of here that would be centrally located and serve I-4. Is that on the table? Is there still talk of that?

Mr. Williamson: I'm not familiar with that specific proposal but I would say at this point there is nothing that is off the table. There are a couple of airports around the state that continue to look for opportunities to expand. The challenge most of these facilities have is frequency of flights and types and places that the flights go to. Usually the hurdle is if they can serve a niche such as FedEx or UPS.

Chair Bustle: When your study first came out, several of us in Manatee County were concerned that there was literally no mention of Port Manatee in your study and in your summary today, the same thing. Port Manatee is the closest deep water U.S. port to the Panama Canal. It is not land locked like most of the other ports are. It has thousands of acres of land available and all of the zoning and other incentives are in place ready for investment. We have a new 1600 foot container berth. On Friday, Governor Scott is coming to Port Manatee along with people from FDOT and others to participate in a groundbreaking ceremony for this 1600 foot container terminal. Why isn't there an interest in Port Manatee?

Mr. Williamson: The FDOT is participating in Phase II of the Study and one of the key activities that is already underway is that we have been going around and meeting with Florida District Offices, Seaport coordinators, as well as the seaports themselves to help get input from them on some of the questions I raised today which is, what's next? How do we refine our strategy moving forward? We've been on site at Port Manatee about a month ago and met with Carlos (Buqueras) and his staff, and had a tour. We are very familiar with the plans they have in place and the berth they have in place. I would say that is being included, in large part for revenue there are 14 ports and a 15th port under study right now. I could share our understanding of the strategic projects each of these ports has done, and I would be more than happy to do that. We do have all of the information and it is being factored in. The four ports that I talked about are the four ports that represent, today, the largest percentage of cargo whether its containers or tonnage. That doesn't mean that we are excluding the other ten ports from discussions. In fact, one of the key things that needs to come out of Phase II is a statewide strategies that are fed by regional initiatives. Each region is critical to Florida achieving what we are trying to accomplish.

Chair Bustle: I volunteer Carlos as a member of your new committee.

Mr. Williamson: If he is willing to serve on that I will make sure he knows to contact Dale

Brill, the Deputy Director of the Florida Chamber Foundation.

Vice Mayor Barnette: My assumption was that geographically speaking, if you are trying to enhance the Asian connection, its closer to the Tampa Bay area than Miami. On the other issue that you argued, you are trying to enhance domestic distribution - the Tampa Bay area is closer for Florida and the continent distribution than Miami. On both scores, it looks like we are being ignored on the west coast and we shouldn't be.

Mr. Williamson: We are by no means ignoring the Tampa Bay Region. There have been significant investments by Port Manatee as well as the Tampa Port Authority and CSX is currently making some serious investments and that will change the way they domestically serve the state of Florida. It's putting all the pieces together. I think the reason folks hear a lot about Port Miami is because it's the only port in the state that is going to be ready when the Panama Canal opens to actually receive those larger vessels. Manatee doesn't have the depth for the big vessels.

Vice Mayor Barnette: Isn't Miami favored insofar as it was a bigger east European distribution site? The Asian part would seem to be a different argument.

Mr. Williamson: It is, if you build it they will come. A lot of ports on the Gulf and the east coast of the U.S. that are all making significant investments to try and get ready for that first port of call. Port Manatee and Tampa have not pursued deepening their channel to 50 feet. Right now you have the deepest water in the state at 40 feet and the other ports are less than that today. Miami is the only one who has actually gone and got Congressional approval for the 50 feet. It is a very fine line. It's a short term priority because they are the only ones who could get Florida on the market. If you look at our report we were very clear to say its not the only one. There are a lot of other investments that need to be done.

Ms. Todd: I heard you say Congressional approval. What do we have to do politically to get the attention for the Tampa Bay area that needs to happen to get whatever the decision-makers need to have occur?

Mr. Williamson: Both Manatee and Tampa have been very active in their communities in negotiations with the Florida DOT and with the Governor's office. You see him coming down to be a part of the opening at Port Manatee. They have done their job reaching out to their representatives. The Congressional approval that I was talking about, it was specific to deepening. If you want to deepen your channel you have to have the U.S. Army Corps of Engineers do a study that takes a long time. Once that study is done, if they come up with approval, then Congress has to put that project in the Water Resources Development Act bill. That is the Congressional authority. If you deepen your waterways without that then you have to maintain it. If you get Congressional authority, then the Army Corps will pay for it and maintain it.

Mayor Minning: Along with that same concept, assuming that Tampa Bay because of the bridge and the channel depth does not participate with the larger container ships, are you still forecasting doubling of exports in the Tampa Bay region?

Mr. Williamson: Sure. One thing to point out is, how deep do you really need to be to handle the larger vessels? You need 50 feet if you want to handle 8,000-9,000 container vessel that's fully loaded. The Tampa Port Authority is working with some of the other Gulf ports. If you can get on the rotation where you are the last port that they stop at, after the vessel has been unloaded a lot and

it is riding higher in the water, you can still bring in the larger vessels in this area. There are still a lot of opportunities. Folks don't expect to immediately ship using vessels that large, in fact, the other vessels that some of the ports here can already handle, a 6,000 TEU vessel instead of a 2,000-3,000 TEU vessel would go into rotation in the Panama Canal because they don't fit today, but they would still be able to come into Florida ports. There is still a great role for Manatee and Tampa to play in our growth and in growing our international trade. It's a matter of which vessels can serve which ports. That needs to still play out based on the steamship lines themselves and the shippers that are driving a lot of those decisions.

Commissioner Brickfield: Is the Skyway Bridge a problem?

Chair Bustle: I understand it's a problem for cruise ships but not for commercial shipping.

Mr. Williamson: It is a problem for cruise ships. I'm not exactly sure of the height of a 10,000 or 12,000 container shipping vessel which they are not anticipating coming to the east coast anyway. It would be more of the 8,000 or 9,000 TEU vessels and I believe they would fit. At some point the bridge will be a problem for container vessels based but not right now.

Commissioner Brickfield: When you say not right now, do you mean ten years out? Ten years for a bridge is today.

Mr. Williamson: I would have to get back to you on actual dimensions of the largest container vessels that they are building today. I would say over the next 5-10 years you should be fine.

Councilman Newton: Did any of the four ports that you mentioned fund this study?

Mr. Williamson: I don't believe any of them contributed to the first Phase. The Florida Ports Council, which represents all of the seaports, provided in-kind services. They had access to some of the international data (the Piers database, import/export records services data) so they were able to allow us access and provide data from that. That was an in-kind contribution. None of the individual seaports, to my knowledge, contributed.

Ms. Todd: Is there anything that we, as a Regional Planning Council, because we represent different counties in Tampa Bay, but we are all supportive of the Port of Tampa and Port Manatee, is there anything that we as a Council can do to encourage greater attention to the ports in the Tampa Bay area?

Councilman Newton: The Governor is coming to Port Manatee and we could do nothing better than to be there, from your region.

Mr. Williamson: I don't think there is a right or wrong answer here. Your ongoing interactions with the MPOs and your District One and District Seven offices that are all engaged in the transportation planning decisions. As an agency and a Council, being involved in promoting and encouraging them to include freight international trade ports as a part of their ongoing process. In a more short-term immediate role I would say there are two ways to help. One is to make sure that this Council is represented in the second phase of the Trade & Logistics Study, either as a part of the advisory committee or part of the outreach activities. The other is, FDOT is in the process of developing its Trade & Logistics Plan and they are going around the state holding listening sessions. I believe there is going to be one in the greater Tampa Bay area in early September. I would encourage you to participate and provide your thoughts on what the priorities ought to be.

Mr. Pumariega: We were able to schedule someone from Tallahassee for the September meeting to talk about freight, mobility and trade.

Ms. Todd:	But I think it is important, what he said, if we could get our Chairman or the Executive Director or someone to designate a couple of people who are really close to the ports and ask that they be included on this advisory committee. Listening sessions come and go. I think it would be important to us to have a voice that was constantly reminding them of the Port of Manatee and the Port of Tampa.
Mr. Williamson:	The other thing that they are doing, they're doing listening sessions with everybody, then they will have scenario planning sessions, and they are also going to have what I think they are calling their CEO Roundtable where they are trying to bring in CEOs from businesses. If you folks have some CEOs you would like to be considered I would encourage you to reach out to FDOT sooner than later.
Chair Bustle:	To whom should we send a letter? The letter could have some names and suggestions.
Mr. Williamson:	Richard Biter, Assistant Secretary for Intermodal Systems and Juan Flores, State Freight & Logistics Administrator are the two people at FDOT to contact.
Chair Bustle:	If we could get a motion to have the Chair send the letter. (Todd/ Brickfield) How could we get a copy of the 2010 Study?
Mr. Williamson:	I can send the link. It's on the Florida Chamber website.
Councilwoman Mulhern:	I'm curious about the intermodal ground transportation. Do you have any idea of how much of the movement once the exports arrive at the port is by train and how much by road?
Mr. Williamson:	Some ports don't have on-port or on-dock rail so they may have a yard ten miles away so the last phase would be by truck. It varies by port.
Councilwoman Mulhern:	What if you compare Miami and Tampa?
Mr. Williamson:	Miami does not have rail access today, it is in disrepair but they are putting it back in place. 75% of the cargo that comes in to Port of Miami stays within 500 miles. By bringing in cargo ships they are hoping to ship their market reach further away. For Tampa, from a container standpoint, it is a very localized market. A lot of that market is still being served by other ports. From a bulk standpoint Tampa serves most of the products in the central Florida market whereas Port of Everglades serves 14 counties in the south. The ports, in general, in Florida are serving regional markets. Some of the investments that are being put in place are so that they can be more than regional ports.
Councilwoman Mulhern:	Is that trend in a broader larger scale?
Mr. Williamson:	In order for a major seaport, like an international global hub seaport to be attractive they need to be able to market they have direct interstate access and direct access to rail. Manatee has rail access and Tampa is almost done with a major gateway project. Jacksonville has a rail project and Miami has a rail project and Everglades has a rail project. In order to be competitive for anything that isn't a regional market, that will service further to the north, they want to move by rail.

Presentations provided at Council meetings can be found at:
www.tbrpc.org/council_members/council_presentations.shtml

7. Council Member Comments

Councilman Roff:	The City of Bradenton will be passing a resolution for support of

Regional Planning Council funding on August 15.

Chair Bustle: I think that's very important to keep this organization healthy and going. If each jurisdiction could pass a resolution that would be very helpful.

Councilwoman Mulhern: The City of Tampa will also pass a resolution in the near future.

8. Program Reports

A. Agency on Bay Management (ABM) – Chair, Mr. Robert Kersteen

The U.S. Department of Interior Bureau of Ocean Energy Management recently completed its Final Environmental Impact Statement for the Gulf of Mexico proposed 2012/17 Oil and Gas Lease Sales. Council staff had reviewed the draft EIS, which for the first time included 83 proposed lease blocks in the extreme western part of the Eastern Planning Area. The inclusion within the Eastern Planning Area is consistent with adopted Council policy since all of the proposed blocks were more than 100 miles from the Gulf of Mexico Florida coastline. The final EIS did not include any proposed lease blocks within the Eastern Planning Area so it is anticipated that no proposals drilling closer than 100 miles from our coastline will be submitted before at least the year 2017.

Ms. Cooper showed a slide depicting the planning areas in the Gulf of Mexico. The Eastern Planning Area covers 300 miles off the Florida coastline. All of the lease blocks are now located in the Central Planning Area and Western Planning Area. Most of the interest is in deeper water. Also, she relayed that both of the exploratory oil wells that have been drilled off Cuba have come up dry. There is one more lease to be drilled on the western end of Cuba before the rig leaves for South America and isn't on the planning horizon to come back.

B. Clearinghouse Review Committee (CRC) - No Report

C. Local Emergency Planning Committee (LEPC) – No Report

D. Emergency Management - No Report

E. Legislative Committee – Vice Chair Minning

Since our meeting in June the FRCA Leadership met with recently appointed DEO Secretary Hunting Deutch. We provided information about the RPCs and provided him with a copy of the FRCA Annual Report. Overall the meeting was very positive.

FRCA is also in the process of scheduling a meeting with the Governor's office that will hopefully take place in the next 3-4 weeks.

The FRCA Policy Board will be meeting on August 24th in Fort Lauderdale. A report will be provided at the September Council meeting.

F. Regional Planning Advisory Committee (RPAC) - No Report

G. Economic Development

Staff provided a report on the status of the Comprehensive Economic Development Strategy (CEDS) 2012 Update. The CEDS update is being guided by a 22 member CEDS Steering Committee, which is comprised of a majority of private sector individuals focused on improving economic development across the region. The

Steering Committee has met and will continue to meet over the next two months to produce the 2012 CEDS for the Council to approve at the October 8, 2012 meeting.

The CEDS Update occurs once every 5 years and this update cycle will stress regional and statewide coordination. Over the past year, the Florida Regional Planning Councils worked with the Department of Economic Opportunity and the Florida Chamber as they conducted 12 regional meetings throughout the state. The information from these workshops and the six pillars will be incorporated within the 2012 CEDS.

Chair Bustle:	You mentioned that this is a funded economic development district. Is it affected by our lack of funding by the State of Florida?
Mr. Pumariega:	Matching funds come from other sources.
Mr. O'Neil:	We receive funding from other sources that we are able to match. It is a federal source, not state.
Chair Bustle:	Are there any tasks that we have that are from the State of Florida that they ask us to do, and yet the funding has gone away?
Mr. Pumariega:	We have been involved with the Department of Economic Opportunity. They are doing a five year strategic plan and the RPCs in Florida felt that was going to be a valuable exercise helping with the workshops. Also, three or four of the RPC Directors, including myself, were part of the caucus group statewide with the Florida Chamber Foundation and have been meeting over the last 5 months to finalize the Six Pillars. Our involvement and our efforts will result in a return on our investment as we are going to be able to utilize the data in our CEDS update.

H. Regional Domestic Security Task Force (RDSTF) - No Report

9. Other Council Reports - None

10. Executive/Budget Committee Report – Chair Bustle - No Report

11. Chair's Report

We will be welcoming a new member government to the Council in the near future. The City of Zephyrhills has voted to become a member. There is a process for joining so we anticipate that they will become a part of the Council in October.

Don Conn said the process involves the member that wishes to join pass a resolution requesting membership to the Council. Then that resolution comes before the Council and Council will then act on that resolution and permit membership at that time. We are waiting for the resolution to come from the city at this time.

It seems to me that when we were talking about Port of Manatee vis a ve the Panama Canal the thinking at Port Manatee has been that we aren't going to aspire to what they call the post Panama ships, which are the ones that need 50 feet of water and long-wide berths. What we are hoping is that all of those big ships that come through the Panama Canal are going to have to download to smaller ships in order to get to Gulf ports. That's where we are focusing our attention. Port Manatee is ready to have a least a modest container load, we

have the cranes. The groundbreaking on Friday, August 17, is actually going to be about a 15 acre container yard that will go with that 1,600 foot pier. Any of you who would like to attend the groundbreaking it starts at 2:00 p.m.

Commissioner Brickfield: I know we have some obstacles and today we addressed them but are there any plans to become a 50 foot depth port? I don't even know when the Skyway Bridge is due for a replacement, but if the shipping world is moving in this direction we either have to adapt or accept that we aren't going to be a big player. When Ms. Cooper showed the map of the drilling you could see all of the ports on the Gulf side. There are some big ports in Texas, Mobile Alabama, and Tampa Bay. Everything else is small.

Chair Bustle: Tampa Bay - the federal channel that comes from the Gulf of Mexico, you take a right turn and come into Port Manatee and you keep on going to Port Tampa. It's about 40-43 feet and everybody that I have heard talk about it says that it's a monumental task to talk about deepening that to 50 feet. The permitting is huge, it's a federal channel, and people who have fished there know there is a lot of rock so that would make it that much more difficult. From Port Manatee's standpoint, that's why we have not included a 50 foot channel as part of our thinking. Miami, as you recall, got a $70 million grant from the State of Florida to jump in quick and deepen their channel to 50 feet. They will be ready and that will be the only port in Florida that I'm aware of that will have 50 feet. I've not heard of any limitation on container ships. But if you want to bring the Oasis of the Sea into Port Tampa, you can't get it under the bridge. That's the ship that holds 5,000-6,000 passengers.

12. Executive Director's Report

Juan Flores will be the presenter at the September Council meeting and will be the person that we will be sending the letter to, to participate in the Trade and Logistics Planning Advisory Committee.

Next Meeting: **September 10, 2012** at 10:00 a.m.

Adjournment: 11:25 a.m.

Larry Bustle

Larry Bustle, Chair

Lori Denman

Lori Denman, Recording Secretary