



CITT MUNICIPAL GUIDELINES

ELIGIBLE EXPENDITURES:

1. *Transit Project Definition: What is defined as a “transit project”?*

A transit project is defined as bus service, rail service and related amenities: bus pull-out bays, bus shelters, bus benches, and bus stops. All expenses associated with the operation and maintenance of a transit project are eligible. Additionally, consultant services for transit planning as well as other related transit administrative expenses are also eligible.

2. *Transit Service Definition: What is defined as a “transit (bus/circulator and/or On-Demand) service”?*

A municipal circulator may be a fixed route. This term is applied to a transit service that is regularly scheduled and operates over a set route.

The County Code was amended to allow for on-demand transportation in certain circumstances. The use of surtax proceeds for on-demand service must be authorized by an Interlocal Agreement (ILA) with Miami-Dade County which has been approved by the Board of County Commissioners. The ILA shall require, among other things, the City, operator, vehicles and chauffeurs comply with applicable safety, mechanical and vehicular standards required by the County and any applicable state or federal requirements and shall detail the implementation plan and fare structure for the on-demand service.

In addition, the use of surtax proceeds for on-demand transportation service shall be limited to providing transportation service where the trip is no longer than five (5) miles in distance. Each city that uses surtax proceeds for on-demand transportation service shall provide an annual report to Miami-Dade County describing the city’s implementation of the on-demand transportation service in accordance with County Code.

3. *Sidewalks: Where and when can the installation or repair of sidewalks be regarded as an eligible project?*

The installation, repair or maintenance of sidewalks is an eligible expenditure that may be funded by the transportation portion of Charter County Transportation System Surtax Fund proceeds under the following conditions:

- Sidewalks constructed as part of a larger road project.
- Stand-alone sidewalk projects that are part of a network of sidewalks which provide for urban mobility (Effective 11/15/2013).

The installation, repair or maintenance of sidewalks is an eligible expenditure that may be funded by the 20% transit portion of Charter County Transportation System Surtax Fund proceeds under the following conditions:

- Sidewalks that are part of a bus stop/bus shelter sidewalk improvement project;
- Sidewalks that provide ADA accessibility to bus shelters and bus stops.

All sidewalk projects must meet ADA guidelines and other applicable standards. Sidewalks and pathways used primarily for recreational purposes in areas such as parks are generally not eligible.

4. ***Personnel and Force Account: Does the cost of city personnel associated with transportation improvements, count toward baseline expenses (e.g., charging a portion of the Public Works Director's time spent on PTP transportation projects)? Can funds from the transit surtax be used to pay for the costs of city staff hired to perform street maintenance duties such as repairing potholes, etc.?***

Yes. Personnel and force account expenditures are eligible. Any allocation of expenses must be reasonable and as a percentage of time spent on PTP projects. Direct expenses for personnel and force account must be documented.

5. ***Landscaping and Irrigation: Are landscaping and irrigation allowed under PTP funding guidelines?***

Landscaping and irrigation are not acceptable uses of surtax funds, unless these are part of a roadway improvement project. Specifically, if in the process of constructing or maintaining a road or bridge, trees must be removed, then surtax funds may be utilized to restore or replant. Landscaping as a "Stand Alone Project," not related to a road improvement Project (e.g., for beautification), is not eligible for surtax funding.

6. ***Vanpools: Are vanpools an eligible expenditure?***

No. In general, vanpools are not an eligible use of surtax funds since they are not part of a bus or rapid transit system. However, this matter may be discussed on a case-by-case basis.

7. ***Street Furniture: Is street furniture (benches, trash cans, tree grates) eligible?*** Benches and shelters at bus stops are an acceptable transit purpose under the state statute and county ordinance. However, street furniture which is not located at bus stops, for example, along parks or public facilities, is not an acceptable use of surtax funds.

8. ***Bike Paths: Are bike paths and/or greenways eligible expenditures?***

The installation, repair or maintenance of bike paths are an eligible expenditure that may be funded by the transportation portion of Charter County Transportation System Surtax Fund proceeds under the following conditions:

- Bike paths constructed as part of a larger road project;
- Stand-alone bike path projects that provide for urban mobility (Effective 11/15/2013);

All projects must meet ADA guidelines and other applicable standards. Bike paths used primarily for recreational purposes in areas such as parks are generally not eligible.

9. ***Schools and School Buses: Are bus shelters for school bus pickup/drop-off points eligible? Are bus bays for school buses eligible? Can school buses be purchased to transport children?***

No. Florida Statute 316.003 has clear, separate, and distinct definitions for a bus and school bus. Therefore, when Florida Statutes and the county ordinance make reference to a bus or bus system, it does not include school buses or school bus amenities. As such, the purchase of

school buses, school bus benches, school bus pullout bays, etc., are not legally acceptable uses of surtax funds.

Municipal circulators can and are encouraged to provide routes that stop at schools. Shelters at those bus stops used for the municipal circulator are eligible.

10. ***Are the painting and/or maintenance of traffic light mast arms, benches, and light poles eligible expenses?*** The maintenance of benches, assuming they are located at transit bus stops, is an acceptable use of surtax funds and would constitute a transit purpose. The maintenance of traffic light mast arms is an acceptable transportation project. Light poles, assuming they are placed to light a road or transit facility, are an acceptable transit or transportation purpose, as applicable.

11. ***Street Signage: What type of signage is eligible for funding?***

Miami-Dade County Department of Transportation and Public Works Department is responsible for maintaining traffic and street signs. A number of municipalities have entered into an interlocal agreement with the County for the municipality to assume responsibility for street signs. In these cases the cost of street sign purchase, installation and maintenance is an eligible transportation expense. Entrance feature signs (e.g. "Welcome to...") are not eligible.

Signage for the municipal circulator is eligible for transit or transportation funding.

12. ***Equipment: Are street sweepers, backhoes, crew cabs, asphalt spreaders, bulldozer excavators, asphalt milling machines, grader, wheel loaders, low floor planers, dump trucks, and street pressure washer's eligible expenditures?***

Yes. The procurement of maintenance equipment, if used for the repair and/or maintenance of roads, is an acceptable transportation use of surtax funds.

13. ***Traffic Cameras: Can traffic cameras be procured with surtax proceeds to monitor traffic conditions and resolve issues when they occur to ensure vehicular mobility?***

Traffic cameras used for the operation of the transportation system are eligible. Traffic cameras used for enforcement activities (e.g., red light cameras) are not eligible.

14. ***Electric Vehicle Charging Stations: Can EV Charging Stations be considered an eligible use of Surtax funds?***

Yes, but only if it is directly servicing an existing transit system or on-demand system (e.g., a Park & Ride, multi-modal transit center, or any similar location where people park their vehicles to then use a fixed-route or on-demand transit service). It is not eligible simply to provide for general public use at any given parking lot. For more ambiguous settings, such as a City Hall parking lot that also serves as a trolley pick-up location, careful discretion is advised. Only a fair and reasonable estimation of the percentage of parking lot patrons using transit service can be claimed as an eligible expense. Municipalities are encouraged to submit plans for this type of use to the CITT and County Attorneys for clarification prior to committing surtax funds to the project.

15. ***Can Surtax funds be used to pay for trolley wraps to show support for different causes (e.g., breast cancer awareness)?***

No, this is not considered an eligible use of surtax funds.

16. *Is the purchase of stormwater and CCTV (closed-circuit television) trucks an eligible use of surtax funds?*

It depends. It's eligible as a transportation expense to the extent it is used only for roadways. If vehicles are not always used for work on roadways, then the percentage of its eligible use would need to be quantified, documented, and paid with PTP funds accordingly. The ability to distinguish and prove the time spent on eligible versus ineligible tasks is important.

17. *Are parking studies an eligible use of surtax funds?*

Yes, as a transportation expense. In some cases, it may even be eligible under Transit if it is part of determining the possibility of installing a Park 'n Ride.

18. *Could event expenses that promote rapid transit services be considered eligible expenses?*

Yes, this could be eligible as part of the five percent of surtax funds allowable for administrative expenses (categorized as a marketing expense under administrative expenses). Of course, proper documentation should be requested for your records.

19. *Could PTP funds be used to pay for police overtime to manage traffic flow and congestion within a municipality?*

In general, this is not likely to be an eligible expense. This matter may be discussed on a case-by-case basis.

20. *Can Surtax funds be used to pay for commercial level on-demand services such as Uber or Lyft?*

Yes, this can be an eligible Transit expense, but within certain guidelines. Rides cannot exceed five miles and cannot discriminate to serve only one portion of the population. For example, when a ride is hailed by someone needing a wheelchair accessible vehicle (WAV), they must always (and not only *sometimes*) be made available.

Furthermore, if a type of service is *available* to all, but subsidized for a select population, such as the elderly, that is allowable. Please note that an interlocal agreement with the County is required for any municipal on-demand transportation services, including partnerships with ride-share companies.

21. *Are PTP dollars an eligible expense for the installation and maintenance of a security surveillance system?*

The installation and maintenance of a security surveillance system is an eligible use of transit surtax funds to the extent or in proportion to the designated spots the garage has for transit riders. For example, if there are 1,000 parking spaces, and 750 spaces are meant for a park n' ride purpose, then the City could theoretically pay up to 75% of the installation and maintenance expense with transit surtax funds. Please note transportation surtax funds are not eligible here, as PTP funds are not meant for parking purposes, unless for special circumstances, such as a park n' ride which is a transit-eligible expense.

Surveillance cameras installed in a bus or trolley for fixed route services are an eligible transit expense.

22. *Are traffic calming devices an eligible use of surtax funds?*

Traffic calming devices in the classic sense such as speed bumps, speed cushions, and traffic circles are an eligible use of transportation surtax funds; devices such as speed radars and cameras are not.

23. *PTP funds may be used for maintenance of traffic training/certification for employees that repair potholes, sidewalks, drains, etc.*

Any training of personnel for purposes of doing work that is eligible to be paid for with surtax funds can itself be paid for with surtax funds up to 5% of total distributions per fiscal year. This falls under the allowable 5% administrative expenses.

GENERAL INFORMATION:

24. *Maintenance of Effort: What level of maintenance of effort is required by municipalities?*

County Ordinance 02-116 (i), states that municipalities are to “continue to provide the same level of general fund support for transportation that is in their FY 2001-02 Budget in subsequent Fiscal Years.”

25. *Bonding of Surtax Revenues: Can a Municipality use its People’s Transportation Plan dollars as the revenue source for a municipal bond?*

Yes. The municipality must provide documentation regarding the bonding of surtax revenues. The projects that will be funded must be clearly identified in the Municipal Transportation Plan.

26. *Rollover: What are the guidelines regarding the rollover of surtax funds?*

As per CITT Resolution No. 09-055, municipalities may rollover Charter County Transportation System Surtax funds for both Transit and Transportation projects. Project utilizing rollover funding must be included in the municipality’s 5-year Transportation Plan to be provided on November 1st, each year. Surtax funds may be rolled over for a maximum of five (5) years unless specifically approved by the Transportation Trust for a longer period.

27. *Annual expenditure of the 20% Transit Portion: When a municipality spends more than the 20% allowed for transit projects in earlier years, is it obligated to meet the 20% requirement in later years?*

Yes. County Ordinance No. 02-116 requires that municipalities allocate at least 20% of its distribution annually on transit projects. The 20% is a minimum level of expenditure, not a maximum. The ordinance further explains that the municipality must expend or encumber by the end of the (fiscal) year its receipt of surtax funds.

28. *Redistribution (Recapture) of Unspent Transit Funds: What are the guidelines for the redistribution (recapture) of transit funds?*

Any municipality that cannot apply the 20% portion of surtax proceeds it receives may contract with the county for the county to apply such proceeds on a county project that enhances traffic mobility within the city and immediately adjacent areas. After the rollover period if the city cannot expend such proceeds in accordance with the established criteria, proceeds shall be recaptured and redistributed to the other cities for transit purposes.

29. *Residency: Can a municipality limit access to non-city residents to transit services funded with the municipal surtax share?*

No. Municipalities may not exclude access to those individuals who are not residents of that municipality. Moreover, residency within a particular municipality of Miami–Dade County cannot form the basis of a differential treatment in terms of services and/or pricing schemes for any projects funded in whole or in part with Charter County Transportation Surtax Funds.

30. *Advertising: Is advertising allowed?*

The Surtax ordinance does not prohibit the placement of advertisements on PTP vehicles and facilities (i.e. bus shelters and benches). Any revenues generated from advertising on vehicles, benches, bus shelters, or transit facilities, in whole or in part, or maintained in whole or in part, by surtax funds, must go back into the PTP fund for use on PTP transit projects. Outside contractors may be used to manage an advertising program with reasonable fees paid out of gross advertising proceeds.

31. *CRA: Are projects undertaken by the CRA of a municipality allowable surtax expenditures and can funds expended by a CRA of a City be used to calculate the City's Maintenance of Effort (MOE)?*

Projects undertaken by the CRA of a City, as an agent of the City, are allowable surtax expenditures provided they meet other eligibility criteria. In terms of calculating the Maintenance of Effort (MOE) requirement for the City, funds expended by the CRA that are from the municipal general fund contribution to the CRA for surtax eligible projects, are eligible for calculating the required maintenance of effort. Only the city general fund portion of the CRA expenditure, not the County portion or other funding sources such as grants or special assessments, may be used for MOE purposes.

32. *Interest Earnings: What are the guidelines for interest earned on PTP funds?*

All interest earned on PTP funds must be credited back to the PTP for expenditure on eligible PTP projects. Where interest earnings are pooled with other sources the PTP fund must receive an appropriate allocation of interest earnings.

33. *Annual Transportation Plan: Can a municipality modify its transportation plan after it has been submitted to the CITT?*

Yes. Although an amendment/change to the plan may be presented anytime during the fiscal year, annual updates of the five-year transportation plan are required, whether changes occur or not, by November 1st of each year.

34. ***Annual Transit Reporting Requirements.*** The County Code was amended in 2018 to require that any new Interlocal Agreement (ILA) or any amendment to an existing ILA (1) must include a provision requiring that the municipality provide to the County the municipality's real time circulator service route information in a format approved by the County's Department of Transportation and Public Works, or its successor department which is compatible with, and may be integrated into the County's smartphone transit tracker application and third party applications, and (2) must include a provision requiring municipalities to provide to the county on a quarterly basis municipal daily transit ridership data for both circulator and on-demand transportation service including a description of any area within the municipal boundaries not being serviced by the municipal transit services. Said data shall be due to the County within 15 days from the end of the corresponding quarter. Within 30 days of receipt of the information from a municipality, the County Mayor or County Mayor's designee shall place a report showing the municipal transit service ridership information for the corresponding quarter.