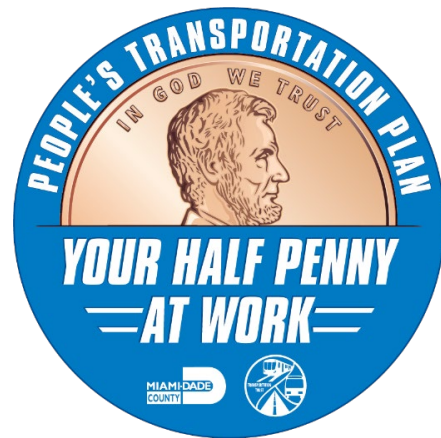


PTP Five-Year Plan Update

Five-Year Implementation Plan of the People's Transportation Plan (PTP)

Tenth Annual Update
Covering Fiscal Years 2022 to 2026



**Citizens' Independent Transportation Trust
and Miami-Dade County**



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Chairman's Message

As the Chairman of the Citizens' Independent Transportation Trust (Transportation Trust), I'm reminded that Miami-Dade County is a great place to live, work and play. Public Transportation plays a vital role in both the economic and physical health of our residents and offers great benefits to the community.

The Transportation Trust is dedicated to its core responsibilities to provide oversight of the People's Transportation Plan (PTP) and develop proactive plans that meet the challenges of improving public transportation in our community. My fellow Trust Members and I remain committed in safeguarding the public's money and we work diligently to maintain their confidence ensuring that the half-penny transportation Surtax funds are spent as intended.

Over the years, PTP funded projects have helped enhance public transportation with new Metrorail, Metromover, and Metrobus vehicles, rail and bus transit system enhancements, Special Transportation Services (STS)/Paratransit services, municipal trolley systems and On-demand services. Half-Penny Surtax improved mobility, and safety for pedestrians and motorists of Miami-Dade County with advanced traffic management system, roads, bridges, neighborhoods, streetlights, and school zone flashing signals improvements. We are proud of the accomplishments made with the half-penny Surtax thus far and look forward to taking Miami-Dade County to another level with innovative and cost-effective solutions to implement the Strategic Miami Area Rapid Transit (SMART) Plan.

Miami-Dade County desires to provide a public transportation system that keeps pace with the needs of this growing population and their transportation needs. I serve on the Transportation Trust because I believe in the potential of this community and the residents of Miami-Dade County deserve a first-class transportation system that is accessible to all.

Oscar J. Braynon, Chairman





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Selected Terms and Abbreviations

ADA – Americans with Disabilities Act of 1990 - A civil rights law passed by Congress in 1990

AFCS – Automated Fare Collection System

ARRA – American Recovery and Reinvestment Act (commonly known as federal stimulus funds)

ATMS – Advanced Traffic Management System

AVL – Automatic Vehicle Location

BCC – Board of County Commissioners

BERT – Bus Express Rapid Transit

BRT – Bus Rapid Transit – combines the quality of rail transit and the flexibility of buses. It can operate on exclusive Transitways, HOV lanes, Expressways, or ordinary streets

CAD – Computer Aided Dispatch

CAO – County Attorney’s Office

Capital Expense – The expenses related to the purchase of equipment

CCTV – Closed Circuit Television

CEI – Construction Engineering and Inspection

CERF – Capital Expansion Reserve Fund

CIG – Capital Investment Grant

CITT – Citizens’ Independent Transportation Trust

CMAQ – Congestion Mitigation and Air Quality

CNG – Compressed Natural Gas

DBE – Disadvantaged Business Enterprise – Designation for a business owned and operated by one or more socially and economically disadvantaged individuals. Includes African Americans, Hispanic Americans, Native Americans, Asian Pacific Americans, or Asian Indian Americans

DCP – Design Criteria Package

DLPM – Durable Liquid Pavement Marking

DTPW – Department of Transportation and Public Works

EA – Environmental Assessment

EIS – Environmental Impact Statement

ESS – Energy Storage System

FDOT – Florida Department of Transportation

Formula Funding – Funds distributed or apportioned to qualifying recipients based on formula described in law

FRA - Federal Railroad Administration

FTA - Federal Transit Administration - Division of the United States Department of Transportation

FTE – Florida’s Turnpike Enterprise

FY – Fiscal Year

GGMTF – Golden Glades Multimodal Transportation Facility

GPS – Global Positioning System

HB385 - House Bill 385

HEFT – Homestead Extension of Florida’s Turnpike

HOV - High Occupancy Vehicle

ILA - Interlocal Agreement

IMG – IMG Rebel, Financial Consultant for CITT

IRP - Infrastructure Renewal Program

ISD – Internal Services Division

JPA – Joint Participation Agreement

Golden Passport - Fare card which allows senior citizens 65 years and older or a social security beneficiary who are permanent Miami-Dade residents to ride transit fare-free

LOGT - Local Option Gas Tax

LPA – Locally Preferred Alternative

LRT – Light Rail Transit (lighter passenger capacity per hour and more closely spaced stops than heavy rail)

LRTP – Long-Range Transportation Plan

MDC– Miami-Dade County

MDT– Miami-Dade Transit

MDX– Miami-Dade Expressway Authority

MIC– Miami Intermodal Center

MOA – Memorandum of Agreement

MOE – Maintenance of Effort

MPO – Metropolitan Planning Organization

NEPA – National Environmental Policy Act

NTD –National Transit Database

NTP – Notice to Proceed

OCITT – Office of the Citizens’ Independent Transportation Trust

Operating Expense or O&M – Recurring operating and maintenance costs (salaries, fuel, etc.)

PD&E – Project Development & Environment, a study to determine social, economic and environmental effects of a proposed transportation project

PTC – Positive Train Control

PTP – People’s Transportation Plan

PWD – Miami-Dade Public Works Department, now a part of DTPW

Rapid Transit – Rail or bus transit service operating separately from all modes of transportation on an exclusive or semi-exclusive right-of-way

Reversible Lanes – A highway or street lane that the directions of traffic flow can be changed to use the maximum roadway capacity during peak periods

RIF – Road Impact Fee

ROD – Record of Decision

ROW – Right-of-Way

SB50 - Senate Bill 50

Section 5309 Discretionary Grants – grants for bus and bus-related equipment and facilities; awarded by FTA

SFRC – South Florida Rail Corridor

SFRTA – South Florida Regional Transportation Authority; operates Tri-Rail; before 2003 was known as Tri-County Commuter Rail Authority

SMART Plan – Strategic Miami Area Rapid Transit Plan

SPO – Small Purchase Order(s)

STS – Special Transportation Services

SR – State Road

TAP – Transportation Alternatives Program

TCC – Traffic Control Center

TIGER – Transportation Investment Generating Economic Recovery

TIP – Transportation Improvement Program

TOD – Transit Oriented Development

TOS – Transit Operations System

TPO – Transportation Planning Organization

TSP – Transit Signal Priority, typically a key part of BRT and Enhanced Bus Service

TVM – Ticket Vending Machine

UPWP – Unified Planning Work Program

UTCS – Uniform Traffic Control System

USCG – United States Coast Guard

WASD – Water and Sewer Department

YOE – Year of Expenditure

Introduction

Background

On November 5th, 2002, the citizens of Miami-Dade County (MDC or the County) approved one half of one percent Charter County Transit System Sales Surtax to implement the People’s Transportation Plan (PTP). As part of the ballot question, the voters also approved formation of the Citizen’s Independent Transportation Trust (the CITT or Trust) to oversee the proceeds of the Surtax and the implementation of the PTP.

The PTP included a broad range of projects and are categorized into Bus Service Improvements, Countywide Rapid Transit Improvements, Major Highway and Road Improvements, Neighborhood Improvements, and Municipal Improvements.

The Citizens’ Independent Transportation Trust (Transportation Trust) is the 15-member body created to oversee the People’s Transportation Plan funded with the half-penny sales Surtax.

Multiple amendments were approved to the PTP between June 2003 and March 2009 to include transit capital improvement projects, changes to roadway projects, bus service improvements, neighborhood Improvements, and Paratransit/Special Transportation Services (STS) implementation. In July 2005, the PTP was amended to restore general fund support to Miami-Dade Transit (MDT), also referred to as Maintenance of Effort (MOE), to the pre-Surtax level of \$123.171 million and annually increase the MOE by 3.5%. Included in the amendment was compliance with the terms of the line of credit obligation letter which outlined the loan approved by the CITT for up to \$150 million in Surtax

funds to support MDT services in existence as of November 5, 2002.

Later in March 2009, the Board of County Commissioners (BCC) amended the PTP (via Resolution R-222-09) to create Capital Expansion Reserve Fund (CERF) and unify the funding structure allowing for greater flexibility in the use of Surtax funds for operations and maintenance of the unified transit system. CERF was established to reserve at least 10% of the Surtax revenue’s excluding debt service, for capital expansion of the transit system. Prior to this resolution, MDT’s operational expenses were reimbursed by the Surtax fund utilizing an allocation model. The model was based on the ratio of expanded bus mileage to the pre-existing mileage at the time the PTP was adopted. After the unification of the County’s transit system, all MDT operational expenses are eligible for Surtax funds reimbursement.

In 2019, the State Legislature passed a bill (HB385) amending F.S. s.212.055 revising the authorized uses of proceeds from charter County and regional transportation system Surtaxes. The bill placed additional restrictions on the use of transportation Surtax funds and the relevant provisions become effective on October 1, 2022.

Additionally, in April 2021, the Florida Senate Bill 50 (SB50) was approved revising the definition of the term “retail sale” to include a remote sale. SB50 became effective July 1, 2021 and is expected to have a positive impact on Surtax collections in the coming fiscal years. Based on the percentage of State taxes received by Miami-Dade County (MDC), the Surtax is estimated to increase approximately \$13.85 million in FY 2022 and going forward it will represent a 3 to 5% increase in expected Surtax collections.

Surtax Collections

Surtax collections over the years from FY 2003 through FY 2022 are shown in the **Table 1** and **Figure 1** below. Due to the unprecedented COVID-19 pandemic, there was a significant drop in the Surtax collections for FY 2020. The total annual Surtax collections during the FY 2020 were 11% less compared to FY 2019. The actual Surtax collections for the FY 2020 were approximately \$26 million less than the Office of Management and Budget (OMB) original projections (made in FY 2019). The economic and travel trends have been improving in FY 2021 throughout the Nation and the County. The proposed Surtax collections for FY 2021 and FY 2022 were estimated to be approximately \$298 million (19% higher than the FY 2020 actuals) and \$293 million (2% less than the FY 2021 projection) respectively.

	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010
Annual Surtax	\$105,273,940	\$161,307,471	\$169,932,719	\$189,517,618	\$191,330,659	\$186,500,770	\$172,706,283	\$176,666,761
Cumulative Surtax	\$105,273,940	\$266,581,411	\$436,514,130	\$626,031,748	\$817,362,407	\$1,003,863,177	\$1,176,569,460	\$1,353,236,221
	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	FY 2018
Annual Surtax	\$189,296,991	\$202,478,062	\$216,132,587	\$228,016,549	\$242,080,187	\$251,691,635	\$255,911,451	\$274,979,613
Cumulative Surtax	\$1,542,533,212	\$1,745,011,274	\$1,961,143,861	\$2,189,160,410	\$2,431,240,597	\$2,682,932,232	\$2,938,843,683	\$3,213,823,296
	FY 2019	FY 2020	*FY 2021	*FY 2022				
Annual Surtax	\$282,819,920	\$250,666,807	\$298,622,000	\$293,251,000				
Cumulative Surtax	\$3,496,643,216	\$3,747,310,023	\$4,045,932,023	\$4,339,183,023				

Table 1 – Surtax Collections FY 2003 through FY 2022

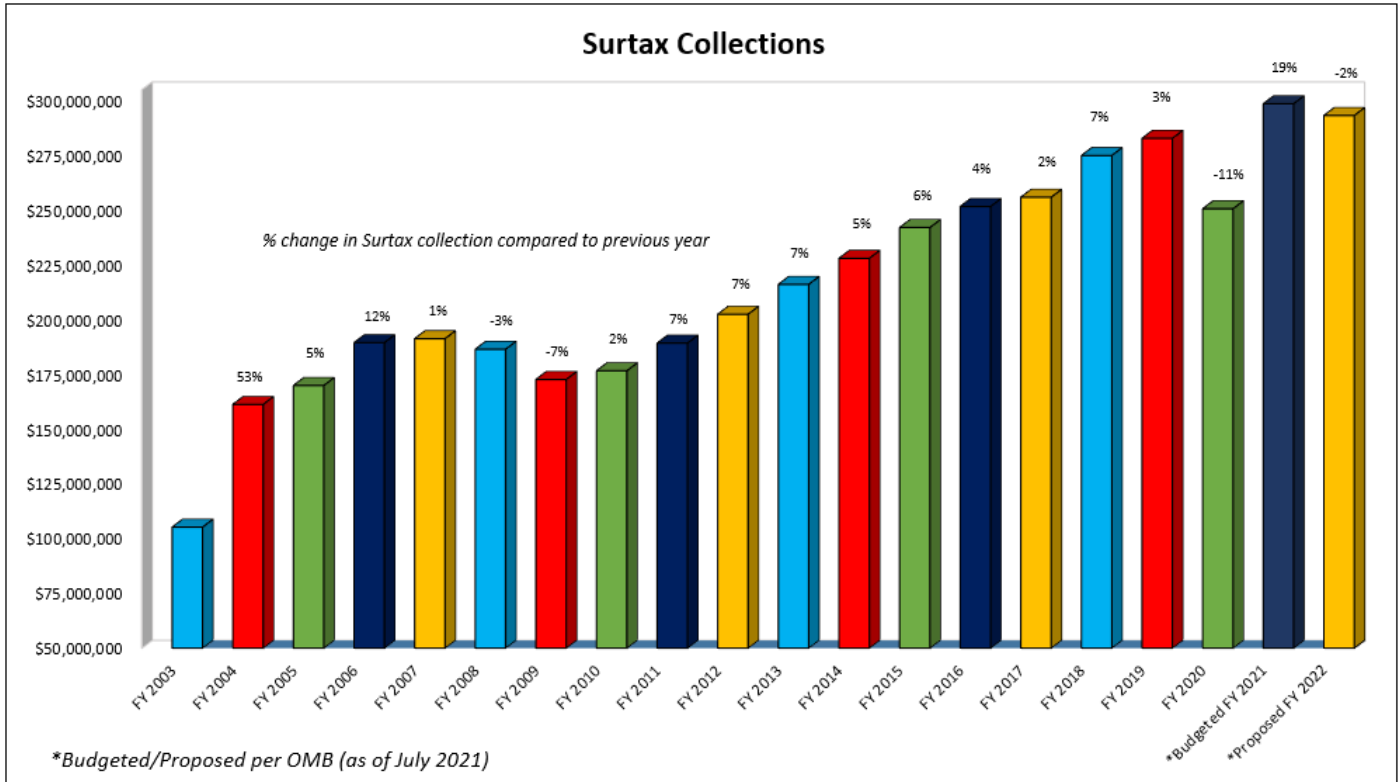


Figure 1: Surtax Collections FY 2003 to FY 2022

Surtax Expenditures

Surtax expenditures for FY 2020 are shown in the **Figure 2** below. Approximately twenty one percent (21%) of FY 2020 Surtax funds were transferred to municipalities. Of the total, thirty percent (30%) was used to pay debt obligations for transit capital projects and approximately thirty percent (30%) was expended on transit operations. Eight percent (8%) of the Surtax funds were used to pay public works projects debt and a little less than one percent (1%) for public works pay-as-you-go projects. Just under one percent (1%) was utilized for the Office of the Citizen’s Independent Transportation Trust (OCITT) operational costs and approximately ten percent (10%) was transferred to CERF.

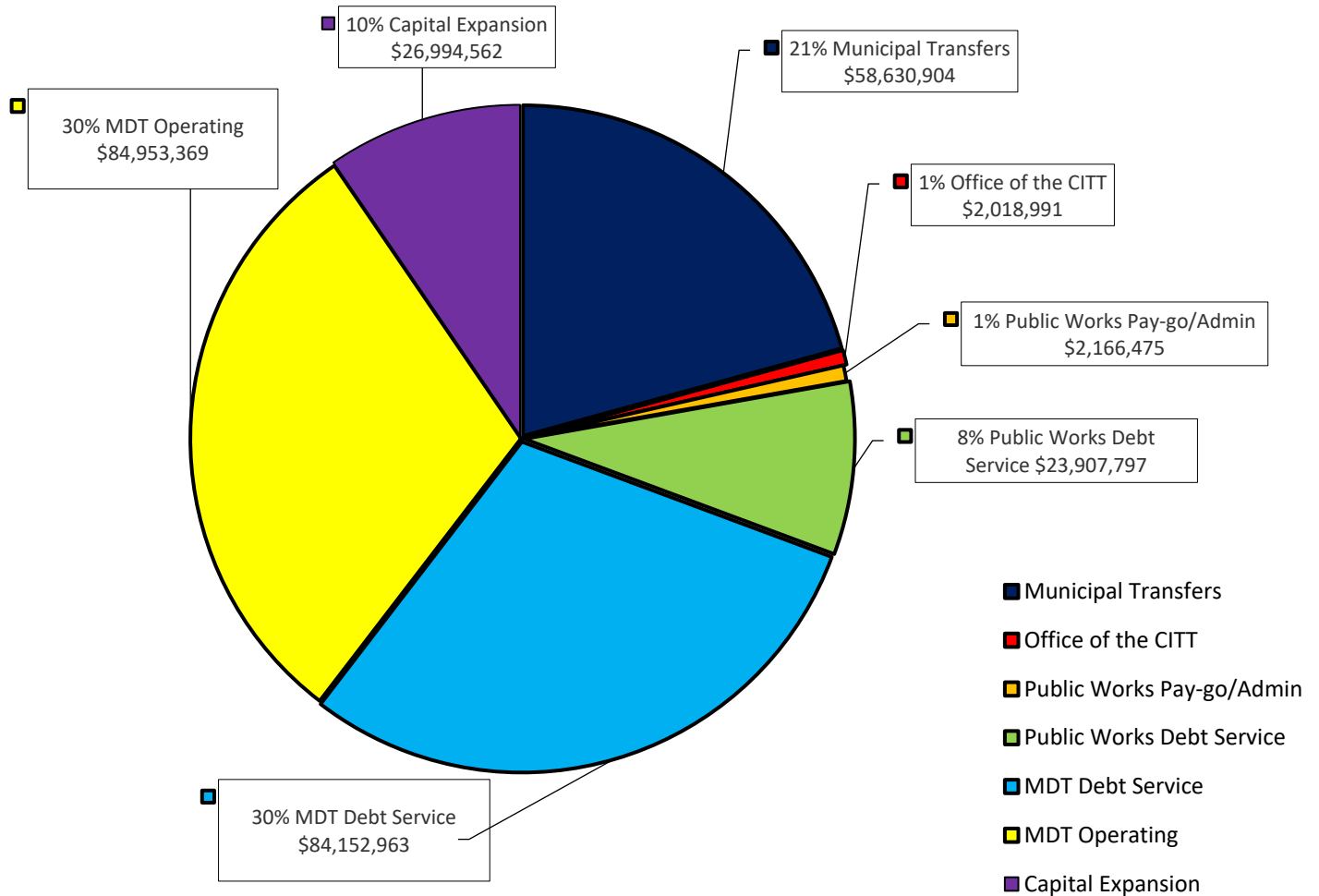


Figure 2: FY 2020 Distribution of Surtax Funds

Significant improvements have been made to the County’s public transit and roadway systems through the investment of Surtax funds since the PTP was enacted. Some of the signature projects completed to date include:

- Implementation of Golden Passport/Patriot Passport program (estimated \$18M annual foregone revenue)
- Fare free Metromover (estimated \$0.8M annual foregone revenue)
- Orange Line, a 2.4 Mile Metrorail extension to Miami International Airport (\$496.6M PTP for Capital and \$16.6M for annual operations)
- Advanced Traffic Management System (ATMS) Phase 1 and 2 completed. Phase 3 ATMS on-going (\$49M PTP Capital)
- Metrorail Central Control Upgrade (\$25.6M PTP Capital)
- Metromover Vehicle Replacement (\$70M PTP Capital)
- Metrorail Vehicle Replacement (\$384.8M PTP Capital)
- Fare Collection Equipment for Buses and Fare Collection Cloud Migration (\$81.9M PTP Capital)
- University Station Pedestrian Overpass (\$6.3M PTP Capital)
- Dolphin Station Park-and Ride (\$13.4M PTP Capital)

- William Lehman Metrorail Operations Center Upgrade (improve test yard and storage tracks (\$12.5M PTP Capital)
- Tri Rail Downtown Miami Link (\$69M PTP Capital)
- Construct new lanes and widen NW 87th Avenue between NW 154th Street and Miami Gardens Drive (\$13.5M PTP Capital)

PTP Surtax funding of \$565M along with Federal funds (\$33.3M) and State funds (\$26.3M) are allocated to purchase new eco-friendly Compressed Natural Gas (CNG), hybrid, electric Metrobus vehicles and electric charging stations. This will modernize the County bus fleet while reducing the carbon footprint. Surtax funded \$316.8M for the Metrorail projects including stations, escalators, elevators refurbishment, acoustical barrier replacement and green line rail component renewal. A Metromover comprehensive wayside overhaul project supported by \$127.8M PTP Surtax is on-going. PTP Surtax funds are also being used to fund several transit infrastructure projects.

PTP Surtax funds played a major role in the advancement of the Strategic Miami Area Rapid Transit (SMART) Plan and related projects. **South-Dade Transitway Corridor** secured Federal Capital Investment Grant (CIG) funds (\$100M), State funds (\$100M) with the assistance of Surtax funds (\$103.5M) local PTP match and advanced to Design-Build with estimated operations in June 2023. Additionally, in early 2021, the project was allocated \$29.5M additional Federal funds via the American Rescue Plan Act (The Act). The Act specified that the funding does not count toward statutory Federal or CIG funding limitations, but rather is meant to assist project sponsors with their local match.

Surtax funds also contributed to the expansion/modification of terminal park-and-rides and stations (SW 344th Street, Dadeland South Intermodal station), Construction of new park-and-rides (SW 168th Street, SW 112th Avenue), and Transit Oriented Development (Quail Roost Drive, Transit Oriented Development (TOD) Master Plan) along the South Corridor. These improvements will provide seamless transfer, connectivity to multimodal transportation options, increased reliability and travel time, iconic stations, level boarding and pre-paid fares for speedy access. Overall, a local match contribution of \$218.3M PTP Surtax funds secured \$255.4M of Federal and State funds towards the South Corridor and related projects.

State Road 836 (SR 836) Express Bus Service Line C from Dolphin Station park-and-ride to Downtown Miami, an incremental improvement along **East-West Corridor** and Dolphin Station park-and-ride opened to revenue service in March 2020. Tamiami Station groundbreaking was completed in August 2020 and Panther Station design was completed, the two additional park-and-ride terminals for SR 836 Express Bus Service Line A and Line B. Direct ramps to dolphin station from SR 836, widening and resurfacing of NW 12th Street to add bus-only lanes and bike lanes between Dolphin Station Park-and-ride and Dolphin mall projects are being implemented to reduce travel time and increase reliability for several routes serving Sweetwater and Doral including SR 836 Express and East-West Corridor. **East-West Corridor** Project Development and Environment (PD&E) and Transit Oriented Development (TOD) master plan studies are being conducted by the Department of Transportation and Public Works (DTPW) and funded by Surtax funds. Approximately \$75 million in Federal (\$9.7M)/State (\$7.1M)/Surtax (\$67.7M) funding is allocated towards all these East-West corridor related project improvements.

SMART plan **Beach Corridor** and TOD master plan for beach corridor projects has \$16.8M PTP, \$1.1M Federal and \$5.8 State and Municipal funding allocation for the project development and planning studies.

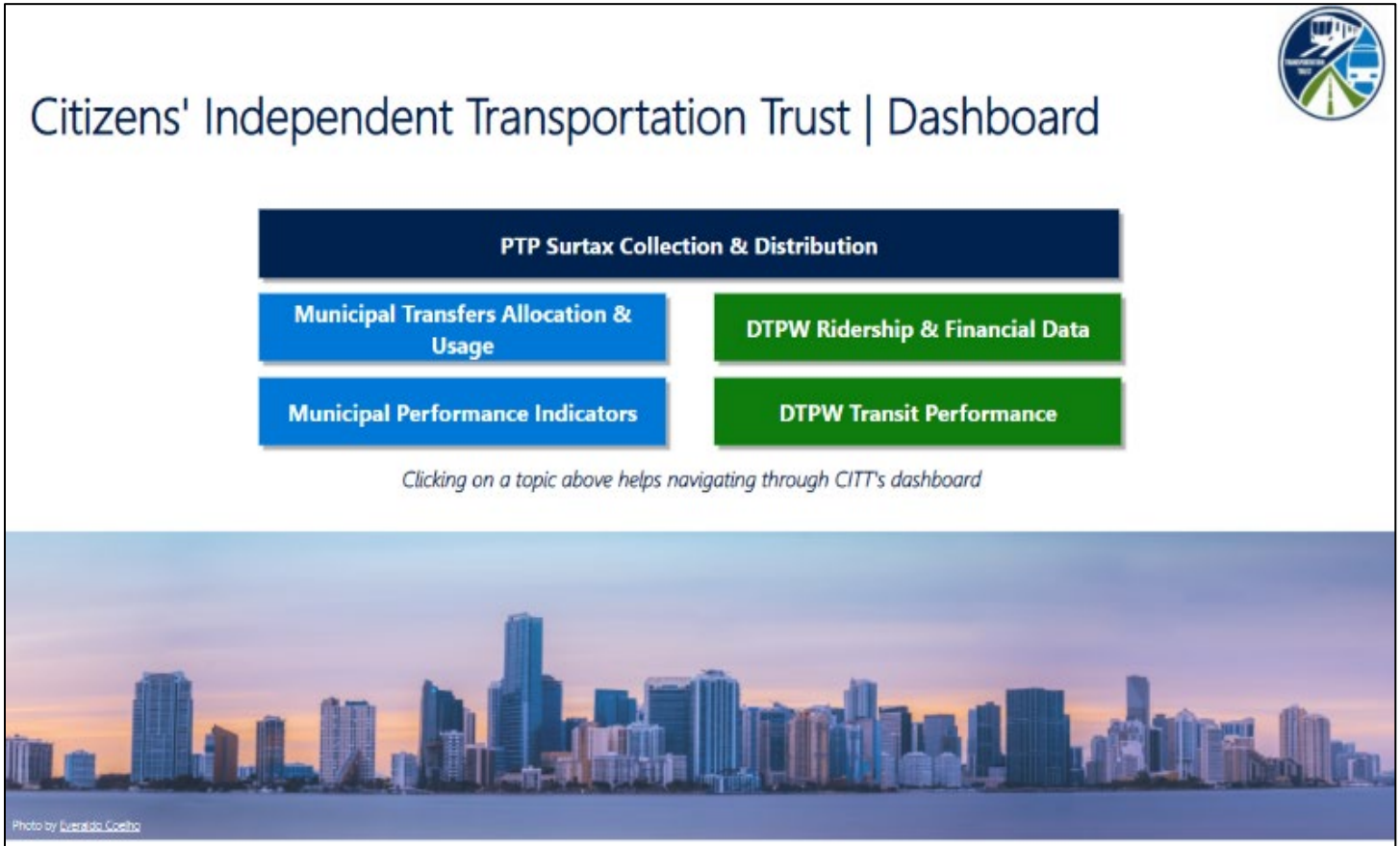
CITT and BCC approved \$76 million in Surtax funding to construct Aventura Station to implement **Northeast Corridor** commuter rail service by 2022. Surtax also funded a total of \$161.9M for the PD&E, Planning and Implementation studies of the **North Corridor, Northeast Corridor, Bus Express Rapid Transit (BERT) network**, and the BERT park-and-rides.

The PTP Surtax has also funded more than 306 miles of roadways and neighborhood improvements throughout the County – including new pavement, resurfacing, guard rails, new bridges, street and traffic signage, Americans with Disabilities Act (ADA) compliant sidewalks, drainage improvements, traffic calming devices, street lighting on arterial roads and school zone safety improvements. PTP facilitated smoother traffic flow, reduced travel time along major roads and enhanced pedestrian safety.

The municipal component of the PTP has generated outstanding results over the years with both transit and transportation (roadway/neighborhood) improvements completed in the 33 participating Cities. Circulator/Trolley or On-Demand Transit systems supported by the PTP are successfully operating in 30 of the participating municipalities. The pre-pandemic annual ridership is over 14 million passengers in FY 2019. The ridership declined significantly to 8.2 million passengers in FY 2020 and 5.51 million passengers in calendar year 2020 due to service suspensions and reduction in service during COVID-19 pandemic.

PTP Interactive Dashboard

The CITT team continues to improve the best practices and effective methods to oversee, monitor and track the PTP Surtax dollars spending. In this regard, OCITT along with its strategic consultant IMG Rebel is developing an interactive, comprehensive, and user-friendly dashboard. The dashboard showcases the progress of the PTP including the Surtax collections, distribution/usage, Municipal and DTPW transit operations performance metrics consistent with National Transit Database (NTD) reporting and spending, statistics on the Surtax funded DTPW capital and infrastructure projects in the form of simplified graphs, charts, and tables. The dashboard is currently under development and will be available on the County CITT webpage upon completion.



House Bill 385 (HB385)

The State Legislature passed a bill (HB385) in 2019 that placed additional restrictions on the use of transportation Surtax funds. The bill's relevant provisions will become effective on October 1, 2022. Summary of the information in the bill pertaining to the use of Surtax is listed below.

- Pursuant to Section 3, ch. 2019-169, effective October 1, 2022, and to the extent not prohibited by contracts or bond covenants in effect on that date, Miami-Dade County shall use proceeds from the Surtax only for the following purposes:

- The planning, design, engineering, or construction of fixed guideway rapid transit systems, rail systems, and bus systems, including bus rapid transit systems, and for the development of dedicated facilities for autonomous vehicles as defined in section 316.003, Florida Statutes.
- The acquisition of rights-of-way for fixed guideway rapid transit systems, rail systems, and bus systems, including bus rapid transit systems, and for the development of dedicated facilities for autonomous vehicles as defined in s. 316.003.
- The purchase of buses or other capital costs for bus systems, including bus rapid transit systems.
- The payment of principal and interest on bonds previously issued related to fixed guideway rapid transit systems, rail systems, or bus systems.
- As security by the governing body of the County to refinance existing bonds or to issue new bonds for the planning, design, engineering, or construction of fixed guideway rapid transit systems, rail systems, bus rapid transit systems, or bus systems.
- For the operation and maintenance of fixed guideway rapid transit systems and bus routes or extensions thereof, including bus rapid transit systems, which were implemented or constructed subsequent to the passage of the Surtax, and for operations and maintenance of services authorized by electors in passing the Surtax or included in the ordinance authorizing the levy of the Surtax subject to the electorate’s approval.
- To the extent not prohibited by contracts or bond covenants in effect on October 1, 2022, no more than 25 percent of the Surtax proceeds may be distributed to municipalities in total. Such municipalities may use the Surtax proceeds to plan, develop, construct, operate, and maintain roads and bridges in the municipality and to pay the principal and interest on bonds issued to construct roads or bridges. The governing body of the municipality may pledge the proceeds for bonds issued to refinance existing bonds or new bonds issued to construct such roads or bridges. Additionally, each such municipality may use Surtax proceeds for transit systems within the municipality.

In an effort to ensure that all proposed uses of Surtax funds will be spent for eligible projects under the new restrictions, OCITT along with the County Attorney’s Office (CAO) and DTPW, reviewed the active projects in the current PTP five-year implementation plan and listed the eligibility of the projects for Surtax funding after HB385 becomes effective. The following table shows the list of projects that are either ineligible or partially eligible for Surtax funding on a pro-rata basis to the extent required due to the implementation of supported projects subsequent to the implementation of the PTP (Orange line 2.4-mile Metrorail extension of Guideway, MIC and Palmetto Metrorail Stations). The CAO interpretation is pending on the language of the bill related to the eligibility of the County’s use of Surtax proceeds for operations and maintenance of roads or bridges and neighborhood improvement projects.

PROJECT NAME	Surtax Funding Eligibility with HB385 in effect
Vision Zero Projects	No. Unless the contract is executed before Oct 1, 2022.
Expansion of Golden Passport to everyone over 65 years of age regardless of income	Only Golden Passport included in the PTP is eligible.
Patriot Passport	No after Oct 1, 2022.
Widen NW 37 Avenue to 5 lanes from 2, NW 79 Street to NW North River Drive	No. Unless the contract is executed before Oct 1, 2022
NE 2 Avenue, NE 91 Street to NE 20 Street (split in 7 phases) - NE 20 Street to NE 36 Street	No. Unless the contract is executed before Oct 1, 2022.
SW 216 Street (Florida’s Turnpike to SW 127 Avenue) Curbs and Gutters, Traffic Operational Improvements	No. Unless the contract is executed before Oct 1, 2022.

PROJECT NAME	Surtax Funding Eligibility with HB385 in effect
Traffic Signals and Signs Operations	Eligibility pending CAO interpretation.
Resurfacing, Sidewalks and Drainage on Arterial Roads	Eligibility pending CAO interpretation.
School Flashing Signals	Eligibility pending CAO interpretation.
Pavement Markings	Eligibility pending CAO interpretation.
Metrorail Escalators and Elevators Refurbishment	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Metrorail Stations Refurbishment	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Additional Elevators at Dadeland North Metrorail Station	No. Unless the contract is executed before Oct 1, 2022.
Parking Garages Overhaul	*Partially eligible on a pro-rata basis after Oct 1, 2022
AC Unit Substations	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Metrorail Fiber Optic and Capacity Augmentation	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Metrorail Traction Power Switchgear Equipment Phase 3	Partially eligible on a pro-rata basis after Oct 1, 2022.
Metrorail Tri-Rail Station Traction Power Sub-Station	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Disaster Recovery Control Center (at PYD)	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Railcar Underfloor Wheel Truing Machine	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Green Line Rail Components Renewal	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Track and Guideway 10-15 Yr. Rail Service Equipment Replacement	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Metrorail Maintenance Vehicle Lift	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Private Branch Exchange Telephone System Upgrade to VOIP	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Government Station – Fire Suppression	No. Unless the contract is executed before Oct 1, 2022.
Emergency Exit at William Lehman Center	No. Unless the contract is executed before Oct 1, 2022.
Metrorail and Metromover UPS Rooms HVAC Installation	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Roadway Signs in the Vicinity of twenty-three (23) Metrorail Stations CIP201	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Rail Public Address System Replacement	No. Unless the contract is executed before Oct 1, 2022.
Upgrade Chiller Units at Lehman Center	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Metrorail Bathrooms	*Partially eligible on a pro-rata basis after Oct 1, 2022.

PROJECT NAME	Surtax Funding Eligibility with HB385 in effect
Purchase of 2 HY-Rail Crew cab Trucks	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Purchase Rail Wheel Press Machine	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Data Closets Uninterruptible Power Supply (UPS) Replacement	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Rail EAMS Work Order Module	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Metrorail Platform Cabling Replacement	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Renovate Lehman Center 2nd Floor (Administration)	No. Unless the contract is executed before Oct 1, 2022.
Lehman Curve N41 Realignment	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Bus Garage and Employees Parking Lot Light Fixtures Upgrade	No. Unless the contract is executed before Oct 1, 2022.
Activu Server Recapitalization	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Transit Scada Station Control Unit Server Recapitalization	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Network Core Switches Recapitalization	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Wireless Lan Access Point Recapitalization	No. Unless the contract is executed before Oct 1, 2022.
Facilities Maintenance EAMS Work Order Implementation	*Partially eligible on a pro-rata basis after Oct 1, 2022.
Train to Wayside Wireless Network at Palmetto Yard	*Partially eligible on a pro-rata basis after Oct 1, 2022.

*Portion of some Metrorail projects may be eligible for Surtax funding after October 1, 2022, to the extent required due to the implementation of supported projects subsequent to implementation of the PTP (Orange line 2.4-mile Metrorail extension of Guideway, MIC and Palmetto Metrorail Stations).

Five-Year Implementation Plan Description

The Board of County Commissioners (BCC) amended the ordinance governing the activities of the Citizens’ Independent Transportation Trust (the “CITT” or “Trust”) (Ordinance 02-116) on September 21, 2010, to establish a Five-Year Implementation Plan. The Trust, in consultation with the Mayor, shall recommend to the County Commission a Five-Year Implementation Plan (the “Plan”). The Plan shall include a detailed scope of work and budget for each project funded with Surtax funds that is anticipated to be implemented, in whole or in part, during the five-year period. The Plan shall be consistent with the federal requirements for the Transportation Planning Organization’s (TPO) (formerly known as Metropolitan Planning Organization (MPO)) Transportation Improvement Program (TIP) and Long-Range Transportation Plan (LRTP). The Plan shall be updated annually.

This report represents the Tenth annual update of the Five-Year Plan. It documents current status and progress in the implementation of Surtax funded projects versus the baseline. Future annual updates to the Plan will continue to monitor the actual implementation of the projects, their adherence to budget and schedule, and any changes to the Plan including project additions, deletions, or deferrals. The project updates included in this plan are as of December 31, 2020, unless otherwise specified. Project expenditures are actual, through FY 2019-20.

The Plan is divided into the following sections:

- **First/Last Leg Connectivity and Shared Mobility Services:** This section includes information on the first and last mile/leg and shared mobility options available within the County and some proposed improvements.
- **New Projects and Active Projects:** This section summarizes new projects proposed by the Department of Transportation and Public Works for Surtax and/or Capital Expansion Reserve Funds for the FY 2022-2026 Five-Year Implementation Plan. This section also includes all active Transit and Public Works projects approved for the use of Surtax and/or Capital Expansion Reserve Funds for FY2022-2026. Active projects are in process or planned within the five-year period; or ongoing operational activities where its respective goal has been amended appropriate to optimal implementation that meets the original intent of the item. Each active project has detailed description to include scope of work and budget. Projects are listed by the following categories:
 - PTP Original Projects
 - Transit (Fare Programs, Transit Service Improvements and Rapid Transit Improvements)
 - Public Works Related projects (Major Highway and Road Improvements, Neighborhood Improvements, Board Requested Projects)
 - Municipal Improvements
 - PTP Amendments 2003-2008 (Miscellaneous Capital Improvements Related to Bus Operations, Miscellaneous Improvements Related to Rail Operations, Additional Amendments)
 - Other Projects 2009 and beyond (Post-unification, Capital Expansion Reserve funded projects, and Infrastructure Renewal Plan)
- **Municipal Program:** This section discusses the Surtax funded municipal program. It summarizes activity on municipal transit service, ridership, connectivity and other transit and transportation (public works and neighborhood Improvements) projects that are funded with the Surtax funds.
- **Inactive Projects:** This section includes a project summary chart of all inactive projects using all or a portion of Surtax and/or Capital Expansion Reserve Funds. Inactive projects are fully complete, unfunded, deemed infeasible, canceled by Board action, or any further implementation deferred outside the Five-Year plan period (beyond fiscal year 2026). Projects are listed in the similar categorical order as active projects.

- **Appendices**

- **Pro-Forma** - The FY 2022 update to DTPW's 40- year Pro-Forma as of July 2021.
- **Capital Budget** - FY 2021-22 Proposed Budget and Multi-Year Capital Plan and FY 2020-21 Adopted Budget and Multi-Year Capital Plan for the DTPW.
- **PTP Ordinances** - This appendix details the original Exhibit 1 attached to the People's Transportation Plan (PTP) and also includes current County Ordinances related to the PTP

Statement of CITT's Guiding Principles and Priorities

The intent of the Citizens' Independent Transportation Trust ("CITT") *Guiding Principles and Priorities* is to provide guidance to the CITT, and its staff and partners, on actions and activities related to the implementation of the People's Transportation Plan ("PTP") and use of Surtax funds. The CITT shall actively seek to amend the CITT By-Laws, County Code and/or State Statutes as necessary to effectuate these provisions.

Mission Statement

The Citizens' Independent Transportation Trust (CITT) is an independent arm of the Miami-Dade County created by the voters to monitor, oversee, review, audit and investigate implementation of the transportation and transit projects funded with Surtax proceeds.

Guiding Principles & Priorities

- 1. Independence.** The CITT was created by the voters as an independent entity of the County and shall endeavor to protect and reaffirm its independence as necessary and appropriate.
- 2. Voter Intent.** Projects, programs and activities related to the CITT, PTP and Surtax proceeds shall align with the original intent of the voter approved PTP referendum. This includes the intended expenditure of Surtax dollars on new and enhanced transportation programs, projects, and service, and not on the operation and maintenance of the system existing prior to the PTP.
- 3. Public Good.** Consistent with the "Citizens" in its title, the CITT should at all times be guided by the public good, and not by political considerations or special interests, and shall strive for equity and fairness across geographic, demographic and socio-economic lines in all of its actions and activities.
- 4. Good Governance.** The CITT shall at all times adhere to good governance practices and principles, holding itself to the highest ethical standards, conducting its business in an open and transparent manner, establishing a culture of integrity, professionalism and accountability, and providing sound financial stewardship of Surtax funds.
- 5. Balance of Interests.** The CITT shall engage in a thoughtful and comprehensive approach to addressing transportation and mobility issues; one which balances, complements and furthers other community objectives, such as placemaking, quality of life, economic development, health and fitness, affordable housing and sustainability.
- 6. Funding Partnerships.** Surtax funds should be leveraged as a local match to attract other funds to the maximum extent possible, including federal/state/municipal funds and private sector contributions. Surtax funds should not exceed 50% of project costs for capital projects, except as otherwise approved by the CITT.
- 7. 5-Year Plan.** In coordination with the County, the CITT shall proactively propose revisions to the PTP 5-Year Implementation Plan ("5-Year Plan"), including the addition and deletion of projects, consistent with these Guiding Principles & Priorities and the CITT's Strategic Objectives.

- 8. Performance, Capacity & Connectivity.** The CITT shall prioritize projects that enhance the performance, capacity and connectivity of the transit system, including the Strategic Miami Area Rapid Transit (SMART) Plan and first/last mile/leg solutions that connect the system to surrounding communities, over projects that promote the use of single occupancy vehicles. Furthermore, the CITT shall work with the County, municipalities, and other transportation entities to ensure that all systems complement and connect with one another and work as seamlessly and efficiently as possible.
 - 9. Capital Expansion Reserve Fund.** The CITT shall work to increase contributions to the Capital Expansion Reserve Fund (CERF), including directing any recaptured, reimbursed, or otherwise uncommitted Surtax proceeds to the fund, and increasing the percentage of Surtax proceeds dedicated to the fund. CERF should be reserved for critical projects that advance or support the SMART Plan; and any proposed use of CERF should first be reviewed and approved by the CITT and BCC.
 - 10. 1st/Last Mile Solutions.** The CITT shall endeavor to have a percentage of annual Surtax proceeds dedicated to 1st/Last mile solutions, such as bike/ped infrastructure, that connects surrounding communities to transit stations.
 - 11. On-Time & On-Budget.** The CITT shall monitor Surtax-funded County and municipal projects to ensure that they are on-time and on-budget, and shall, to the extent possible, withhold, recapture or repurpose funds for projects that are significantly delayed or over-budget unless an acceptable justification is otherwise provided.
 - 12. Customer Experience.** The CITT shall work with the County and municipalities to ensure that the expenditure of Surtax funds is resulting in a positive customer experience and that transit systems and facilities are clean, well-maintained and operating efficiently and effectively.
 - 13. Promotion.** The CITT shall support the development and execution of a multi-pronged branding, marketing and public relations campaign(s) to promote the CITT, PTP and its initiatives, and support promotional efforts that aim to increase the use of alternative modes of transportation such as riding transit, carpooling/vanpooling with someone, and bicycling or walking.
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Notable Changes to the FY 2022-26 Five-Year Implementation Plan

The Five-Year Implementation Plan (the Plan) presents status on the scope, cost, and timing of initiatives both completed and in progress. The following table details projects with an increase in Surtax dollars in the FY 2022-26 Five-Year Plan Update versus the prior year.

INCREASE IN PTP SURTAX/CAPITAL EXPANSION RESERVE FUNDING

PROJECT NAME	Requested Surtax Funding FY 2021-25 Five-Year Plan	Requested Surtax Funding FY 2022-26 Five-Year Plan	Funding Increase/(Decrease)	Reason for Funding Increase/(Decrease)
Traffic Signals and Signs Operations	\$32,889,000	\$34,579,000	\$1,690,000	Budget allocated for the upcoming new fiscal year operations.
SMART Plan East-West Corridor PD&E	\$12,000,000	\$25,000,000	\$13,000,000	Additional budget to complete the FTA CIG project development phase and design criteria package.
SMART Plan Northeast Corridor Planning and PD&E	\$1,143,000	\$25,000,000	\$23,857,000	Additional budget for the FTA CIG project development phase. The local funding commitment is required by the CIG program before approval to enter the project development phase.
SMART Plan North Corridor Planning and Implementation	\$2,286,000	\$11,154,000	\$8,868,000	Additional funds requested for the Interim Agreement phase which include request to enter into FTA Project Development and begin preliminary engineering.
SMART Plan Flagler Corridor Planning and Implementation	\$1,143,000	\$287,500	(\$855,500)	Increase in FTA funding share.
Metrorail Tri-Rail Station Traction Power Sub-Station	\$12,000,000	\$18,237,800	\$6,237,800	Land Acquisition cost increased due to SFRTA parcel unavailability.
Metromover Comprehensive Wayside Overhaul	\$92,163,000	\$127,766,500	\$35,603,500	Bid price received was higher than the preliminary cost estimate. Additional design and engineering scope and costs were added to make the necessary provisions for a direct route/connection to the Beach Corridor. The new signaling system will have programming developed for running a direct route to Museum Park Station.

DEFERRED COMPLETION

The FY 2022-26 Five-Year Plan Update reflects a number of PTP approved projects having estimated completion dates of one or more years later than projected in the previous year Five-Year Plan Update.

PROJECT NAME	Completion Date	Completion Date	Reason for change in Completion Date
	FY 2021-25 Five-Year Plan	FY 2022-26 Five-Year Plan	
Coverboard Replacement	September 2025	September 2027	Delay due to shortage of staff
SMART Plan South-Dade Transitway Corridor	June 2022	June 2023	Delay due to longer than expected procurement process
SMART Plan Northeast Corridor Planning and PD&E	September 2023	September 2024	Project advancement for CIG process
SMART Plan BERT Beach Express South (Route f3)	September 2023	September 2024	Pending BCC approval of the CIGP Grant agreement with FDOT.
Dadeland South Intermodal Station	September 2023	September 2024	Delay due to project rescoping. Design Criteria package is being revised to reflect the changes.
SR 836 Express Bus Service – Panther Station	September 2022	November 2023	Delay due to longer license agreement negotiation process.
Greenline Rail Component Replacement	June 2027	June 2028	Delay due to shortage of staff and COVID pandemic Impacts.
10-15 Year Track Equipment Replacement	January 2022	January 2023	Delays in manufacturing and delivery of equipment due to Covid-19.
Private Branch Exchange (PBX) Telephone System Upgrade to Voice Over Internet Protocol (VoIP) at all Transit Facilities	September 2021	September 2022	COVID Pandemic impacts to staff and vendor site visits delayed design and quotes.