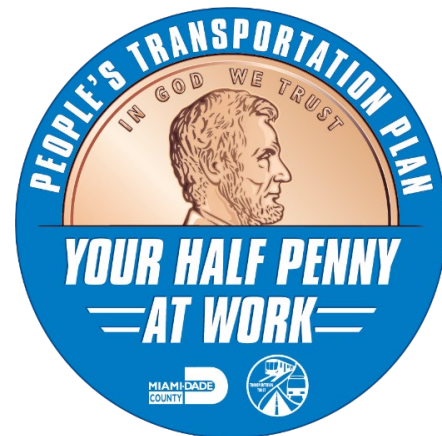


# PTP Five-Year Plan Update

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

Twelfth Annual Update  
Covering Fiscal Years 2024 to 2028



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



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**Chairman's Message**

As the new Chairman of the Citizens' Independent Transportation Trust (CITT), I am 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 CITT 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 transit in our community. My fellow Trust Members and I remain committed in safeguarding the public's money and we work diligently to maintain the Public's confidence, ensuring that the half-penny transportation Surtax funds are spent as intended.

Over the years, PTP funded projects have greatly enhanced public transportation. For example, we now have a 2.5-mile Metrorail extension to Miami International Airport; new Metrorail, Metromover, and Metrobus vehicles; rail and bus transit system and station enhancements; Special Transportation Services (STS) for people who can't use regular transit services; fare free municipal trolley/on-demand services; an advanced traffic management system; roadways, bridges, and neighborhood improvements, and more.

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 that will help us implement the Strategic Miami Area Rapid Transit (SMART) Plan.

It is an exciting time for transportation in Miami-Dade County. We have never been better connected locally and regionally, and the vision for the future is equally impressive. The investments of our half-penny sales Surtax into public transportation and the expansion of our system are connecting people and communities, serving the residents, helping sustain our growing economy, and contributing to the ongoing and prosperous development of Miami-Dade County which brings about increased business opportunities and high-paying job prospects. And all this is possible thanks to the contributions of the taxpayers whom we represent as the Trustees of the half-penny sales Surtax.

Robert Wolfarth, 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

**CatEx** – Categorical Exclusion

**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

**Mega Program** – a National Infrastructure Project Assistance Program

**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.

**PSD** – Procurement Services Division

**PTC** – Positive Train Control

**PTP** – People’s Transportation Plan



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

**RAISE Grants** – Rebuilding American Infrastructure with Sustainability and Equity, a discretionary grant program

**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 5<sup>th</sup>, 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 Citizens’ 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 (CITT) 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 Miami-Dade Transit 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 the 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. The 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 were eligible for Surtax funds reimbursement. However, 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 became effective 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 have a positive impact on Surtax collections.

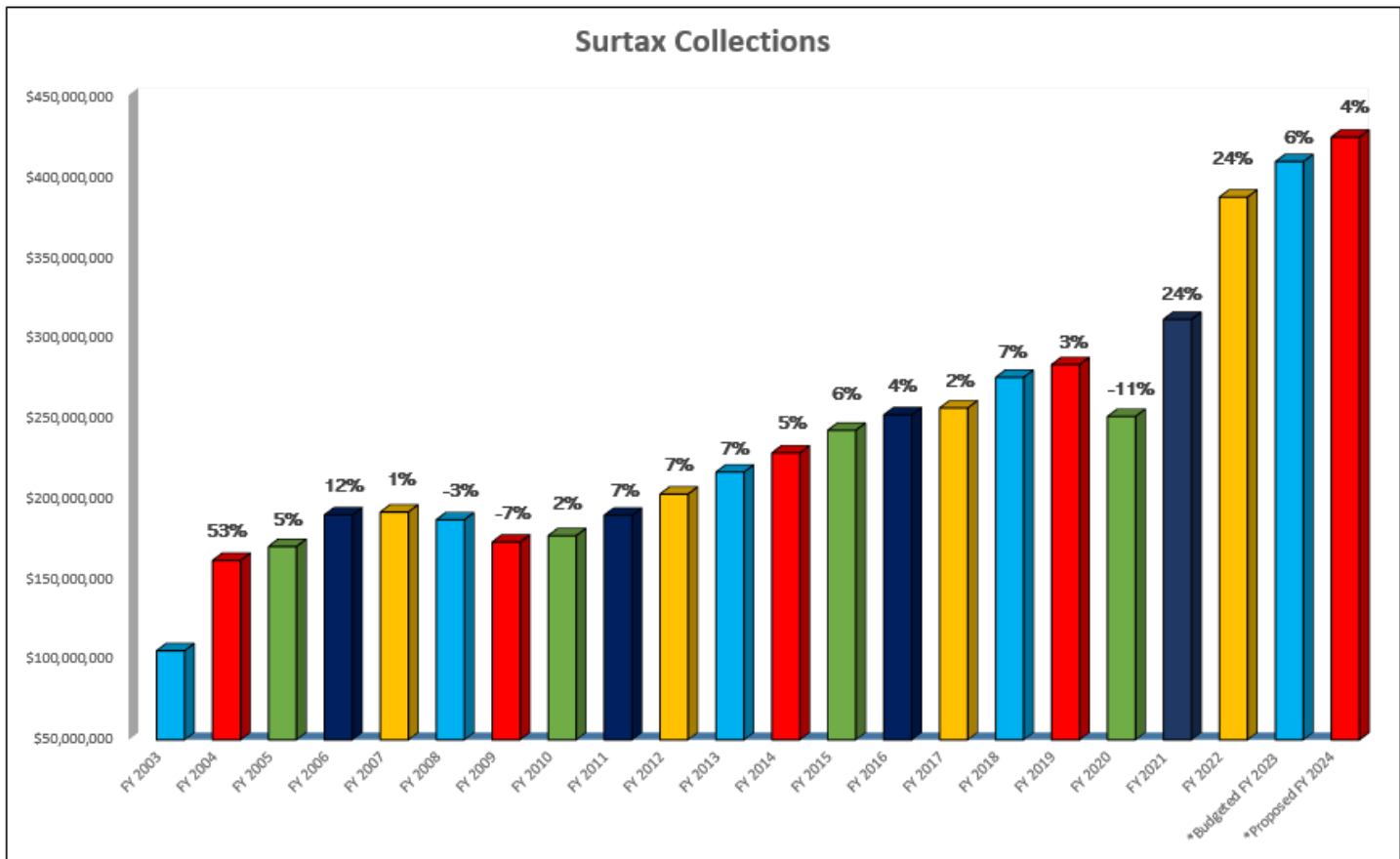
## Surtax Collections

Surtax collections over the years from FY 2003 through FY 2024 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 in FY 2020. However, the Surtax collections showed a significant increase in FY 2021 and FY 2022. The total annual Surtax collections during FY 2022 were approximately \$386.8 million, 24% higher compared to FY 2021. The budgeted and proposed Surtax collections for FY 2023 and FY 2024 were estimated to be approximately \$408 million and \$424 million respectively.

	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010
<b>Annual Surtax</b>	\$105,273,940	\$161,307,471	\$169,932,719	\$189,517,618	\$191,330,659	\$186,500,770	\$172,706,283	\$176,666,761
<b>Cumulative Surtax</b>	\$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
<b>Annual Surtax</b>	\$189,296,991	\$202,478,062	\$216,132,587	\$228,016,549	\$242,080,187	\$251,691,635	\$255,911,451	\$274,979,613
<b>Cumulative Surtax</b>	\$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	*FY 2023	**FY 2024		
<b>Annual Surtax</b>	\$282,819,920	\$250,666,807	\$310,906,128	\$386,789,543	\$408,853,000	\$424,000,000		
<b>Cumulative Surtax</b>	\$3,496,643,216	\$3,747,310,023	\$4,058,216,151	\$4,445,005,694	\$4,853,858,694	\$5,277,858,694		

\* Budgeted as per FY 2023 Adopted Pro-Forma; \*\* Projected as per draft FY 2024 Pro-Forma

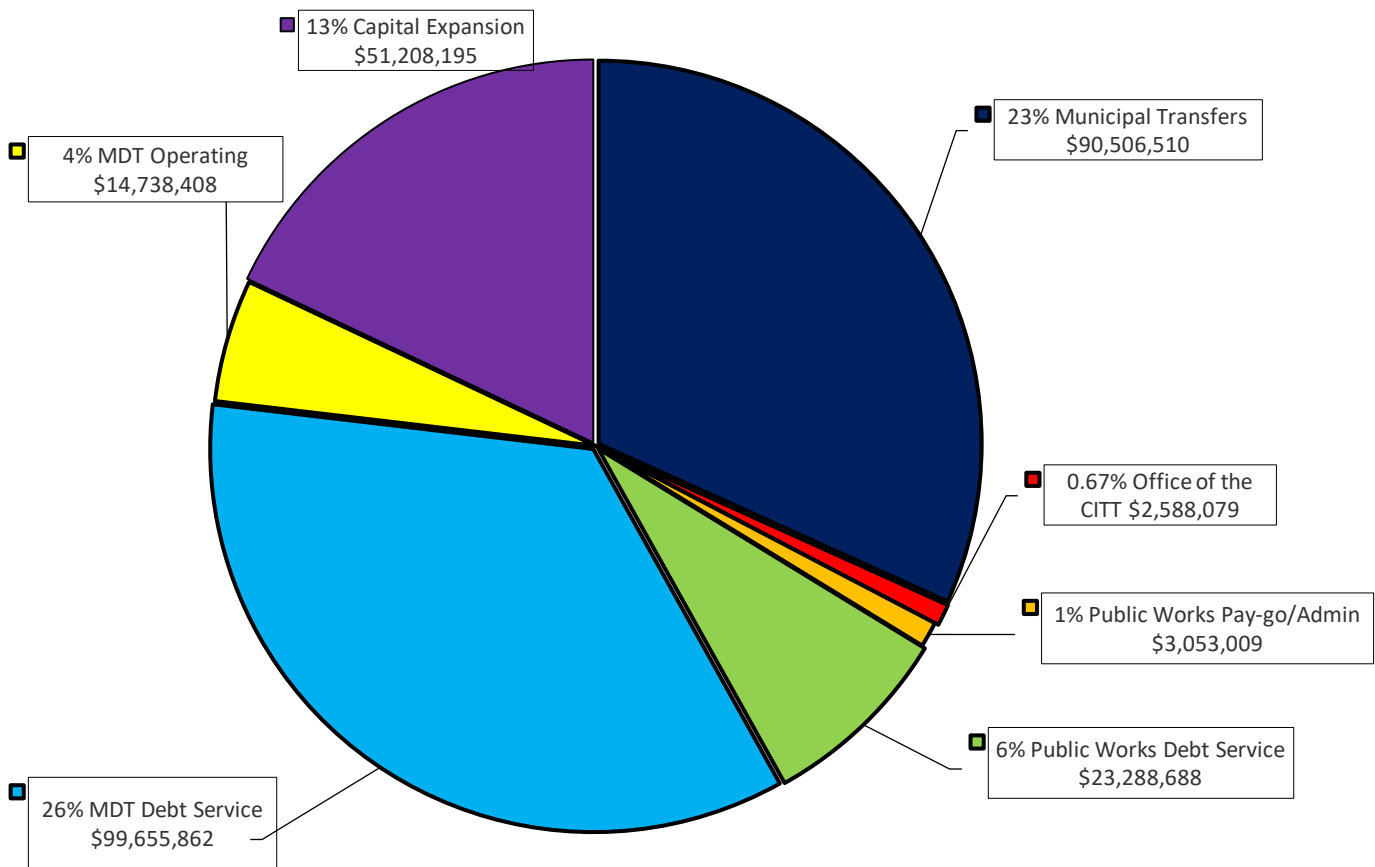
**Table 1 – Surtax Collections FY 2003 through FY 2024**



**Figure 1: Surtax Collections FY 2003 to FY 2024**

## Surtax Distribution

Surtax distribution for FY 2022 is shown in the **Figure 2** below. Approximately twenty-three percent (23%) of FY 2022 Surtax funds were transferred to municipalities. Of the total, twenty-six percent (26%) was used to pay debt obligations for transit capital projects and approximately four percent (4%) was expended on transit operations. Six percent (6%) of the Surtax funds were used to pay public works projects debt services, and one percent (1%) for public works pay-as-you-go projects. Under one percent (0.67%) of Surtax funds were utilized for the Office of the Citizens’ Independent Transportation Trust (OCITT) operational costs and approximately thirteen percent (13%) was transferred to the Capital Expansion Reserve Fund (CERF). There is a fund balance of approximately 26% (\$101.75M) of the total Surtax collected (\$386,789,543) in FY 2022 that is not reflected in the pie chart below.



**Figure 2: FY 2022 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 (\$399.8M 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)
- Tamiami Station Park-and Ride (\$8.2M PTP Capital)
- Northeast Corridor West Aventura Station (\$76.7M 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 87<sup>th</sup> Avenue between NW 154<sup>th</sup> Street and Miami Gardens Drive (\$13.5M PTP Capital)

PTP Surtax funding of \$121.5M along with Federal funds (\$76.5M), State funds (\$35.7M), and County Bond/Debt Lease Financing (\$405.1M) are allocated to purchase new eco-friendly Compressed Natural Gas (CNG), hybrid, electric Metrobus vehicles, bus batteries and electric charging stations. This will modernize the County bus fleet while reducing the carbon footprint. Surtax currently funds \$473.7M for the Metrorail track, guideway, stations, systems, and signage improvement projects. A Metromover comprehensive wayside overhaul project supported by \$132.2M PTP Surtax and \$39.7M Federal funding is on-going. Other Metromover projects including guideway superstructure retrofit are being supported with \$98.4 million of PTP Surtax funds.

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 (\$107.5M) local PTP match and advanced to Design-Build with estimated operations in 2024. 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 344<sup>th</sup> Street, Dadeland South Intermodal station), Construction of new park-and-rides (at SW 168<sup>th</sup> Street, SW 112<sup>th</sup> Avenue, SW 264 Street), BRT station drop-off/pick up areas and shared-use path enhancements, Transit Oriented Development (TOD) at Quail Roost Drive, TOD Master Plan study along the South Corridor and a South-Dade area bus maintenance facility. 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 \$531.6M PTP Surtax funds secured \$236.6M of Federal and State funds towards the South Corridor and related projects.

SMART plan **Beach Corridor** Trunkline (Baylink) is budgeted with \$763 M PTP Surtax funds in FY 2023-24 capital budget to secure \$250M State funding in the future. The Beach Corridor Design District extension project development and environment (PD&E) study and the TOD master plan for beach corridor projects are funded by \$11.2M in Surtax funding.

State Road 836 (SR 836) Express Bus Service Line A and Line C from Tamiami Station and Dolphin Station park-and-rides to Downtown Miami, an incremental improvement along **East-West Corridor**, Dolphin Station and Tamiami Station park-and-rides opened to revenue service. The design of Panther Station, a park-and-ride terminal for SR 836 Express Bus Service Line B was completed. Widening and resurfacing of NW 12<sup>th</sup> Street to add bus-only lanes and bike lanes between Dolphin Station Park-and-ride and Dolphin Mall is 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 \$64.5M in Surtax funding secured \$9.7M Federal and \$3.4M State funding for all these East-West corridor and related project improvements.

In addition, Surtax funds of \$475M were programmed in the FY 2023-24 budget to utilize as a local match to secure \$475M in State and \$950M in Federal funds to implement the **North Corridor**.

PTP Surtax funding of \$189.5M and State funding of \$164.5M were approved to secure \$328.9M federal funding for the Northeast **Corridor**.

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 31 of the participating municipalities. The pre-pandemic annual ridership was over 14 million passengers in FY 2019. The ridership declined significantly to 5.4 million passengers in FY 2021 due to service suspensions and reduction in service during the COVID-19 pandemic. However, a significant increase in ridership to approximately 9.06 million passengers in FY 2022 was noted.



## 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.

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).

Project Name	Surtax Funding Eligibility with HB385 in effect
Expansion of Golden Passport to everyone over 65 years of age regardless of income	Only Golden Passport included in the PTP Exhibit 1 is eligible.
Patriot Passport	Not eligible after Oct 1, 2022.

Project Name	Surtax Funding Eligibility with HB385 in effect
NW 37 Avenue from NW 79 Street to North River Drive - Widening from 2 to 5 lanes	Yes, to the extent included in the Contract/Bond 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	Yes, to the extent included in the Contract/Bond executed before Oct 1, 2022.
Resurfacing, Sidewalks and Drainage on Arterial Roads	Yes, to the extent included in the Contract/Bond executed before Oct 1, 2022.
Pavement Markings	Yes, to the extent included in the Contract/Bond executed before Oct 1, 2022.
Vision Zero Projects	Yes, to the extent included in the Contract/Bond executed before Oct 1, 2022.
Track and Guideway Rehabilitation: Seal Gland Rehabilitation, Coverboard Replacement, Metrorail Piers Coating	Yes, to the extent included in the Contract/Bond executed before Oct 1, 2022.
Transit Oriented Development (TOD) Master Plan Projects for Beach Corridor, North Corridor, and South Corridor.	Yes, to the extent included in the Contract/Bond executed before Oct 1, 2022.
Parking Garages Overhaul	Yes, to the extent included in the Contract/Bond executed before Oct 1, 2022.
Additional Elevators at Dadeland North Metrorail Station	Yes, to the extent included in the Contract/Bond executed before Oct 1, 2022.
Metrorail Escalators and Elevators Refurbishment Metrorail Stations Refurbishment AC Unit Substations Metrorail Fiber Optic and Capacity Augmentation Metrorail Tri-Rail Station Traction Power Sub-Station Disaster Recovery Control Center (at PYD) Green Line Rail Components Renewal Track and Guideway 10-15 Yr. Rail Service Equipment Replacement Private Branch Exchange Telephone System Upgrade to VOIP Government Station – Fire Suppression	Yes, to the extent included in the Contract/Bond executed before Oct 1, 2022. *Partially eligible on a pro-rata basis post contract/bond.
<u>Infrastructure Renewal Plan Projects:</u> Roadway Signs in the Vicinity of twenty-three (23) Metrorail Stations CIP201 Upgrade Chiller Units at Lehman Center Purchase of 2 HY-Rail Crew cab Trucks Rail EAMS Work Order Module Implementation Metrorail Platform Cabling Replacement Lehman Curve N41 Realignment Facilities Maintenance EAMS Work Order Implementation Transit Activu Server Recapitalization Transit Scada Station Control Unit Server Recapitalization	Yes, to the extent included in the Contract/Bond executed before Oct 1, 2022. *Partially eligible on a pro-rata basis post contract/bond.

Project Name	Surtax Funding Eligibility with HB385 in effect
Network Core Switches Recapitalization 40-Year Recertifications of DTPW Transit Facilities Train to Wayside Wireless Network at Palmetto Yard	
<u>Infrastructure Renewal Plan Projects:</u> Metromover Vehicles HVAC Compliance Overhaul & Mover Building A/C Replacement Wireless Lan Access Point Recapitalization Parking Lot Refurbishment at Northeast, Coral Way, and Central Bus Facilities Dadeland South Tail Track Security Perimeter Fence Renovate Lehman Center 2nd Floor (Administration) Bus Garage and Employees Parking Lot Light Fixtures Upgrade Fueling Terminal Modernization Metrorail Bathrooms Rehabilitation Replace and Upgrade Physical Assets Metrorail Public Address System Replacement	Yes, to the extent included in the Contract/Bond executed before 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).

## 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 developed an interactive, comprehensive, and user-friendly dashboard. The dashboard showcases the progress of the PTP including Surtax collections, distribution/usage, Municipal and DTPW transit operations performance metrics consistent with National Transit Database (NTD) reporting standards, and statistics of the Surtax funded DTPW capital and infrastructure projects (consistent with the latest adopted PTP five-year implementation plan update). The dashboard is available on the County CITT website and will be periodically updated as the latest data becomes available.

## 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 Twelfth annual update of the Five-Year Plan. It documents 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, 2022, unless otherwise specified. Project expenditures are actual, through FY 2021-22.

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 Municipalities and some proposed improvements. This is an informational section.
- **New 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 2024-2028 Five-Year Implementation Plan update. This section also includes all active transit and public works projects approved for the use of Surtax and/or Capital Expansion Reserve Funds for FY 2024-2028. 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 which includes the 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)
  - PTP Amendments 2003-2009 (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, and other transit and transportation projects that are funded with 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 2028). Projects are listed in the same categorical order as active projects.

- **Appendices**

- **Pro-Forma** - The FY 2024 update to DTPW's 40- year Pro-Forma as of July 2023.
- **Capital Budget** - FY 2023-24 Proposed Budget and Multi-Year Capital Plan and FY 2022-23 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.
- **Index**

## 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 the implementation of 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. 1<sup>st</sup>/Last Mile Solutions.** The CITT shall endeavor to have a percentage of annual Surtax proceeds dedicated to 1<sup>st</sup>/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.

Notable Changes to the FY 2024-28 Five-Year Implementation Plan

The Five-Year Implementation Plan (the Plan) presents status on the scope, cost, and schedule of initiatives both completed and in progress. The following table details projects with an increase in Surtax dollars in the FY 2024-28 Five-Year Plan Update versus the prior year.

**INCREASE/DECREASE IN PTP SURTAX FUNDING**

<b>Project Name</b>	<b>Requested Surtax Funding FY 2023-27 Five-Year Plan</b>	<b>Requested Surtax Funding FY 2024-28 Five-Year Plan</b>	<b>Funding Increase/(Decrease)</b>	<b>Reason for Funding Increase/(Decrease)</b>
Metrorail Vehicle Replacement	\$384,777,000	\$399,787,000	\$15,010,000	Funding required for consulting services to close out service delivery and transition the scope of work under the agreement to DTPW.
South-Dade Area Bus Maintenance Facility	\$167,619,000	\$268,500,000	\$100,881,000	Multiple revisions to the project budget as a result of: Project footprint reduction resulting in additional cost. Project programming refined scope definition and budget allowing to fast-track the project to align with the electric bus procurement schedule. Project cost revised as per the 90% design plans and an option estimate to include electric bus charging equipment. Project budget added for construction management activity.
South-Dade Trail Shared-Use Path Enhancements	\$3,000,000	\$6,786,000	\$3,786,000	Project was recently awarded an additional \$3 million grant that requires 50% local match.
South Dade Transitway Stations Drop-off/Pick-up Areas	\$4,463,000	\$630,000	(\$3,833,000)	Funding was decreased as the project originally did not receive grant. However, DTPW received a notification later that the project received additional grant funds which requires local match. PTP match will be re-programmed in the next Budget cycle.
SMART Plan Beach Corridor (Bay Link)	\$16,580,000	\$763,000,000	\$746,420,000	Local funding share of the total estimated capital cost of a Metromover system. Local funding required to be budgeted to secure FDOT funds and advance the project to completion.
SMART Plan North Corridor Planning & Implementation	\$11,154,000	\$475,000,000	\$463,846,000	Capital budget increase to position the project to pursue discretionary grants such as Reconnecting Community, MEGA, RAISE and other discretionary opportunities.
Transit Oriented Development Master Plan for North Corridor	\$101,300	\$315,000	\$213,700	Total project cost is higher than FTA award and the original local match (PTP). Increase in PTP share to cover additional funds needed to complete the project.

Project Name	Requested Surtax Funding FY 2023-27 Five-Year Plan	Requested Surtax Funding FY 2024-28 Five-Year Plan	Funding Increase/(Decrease)	Reason for Funding Increase/(Decrease)
SMART Plan Northeast Corridor Planning and PD&E	\$25,000,000	\$189,446,000	\$164,446,000	Capital Budget of 30% local match required to comply with FTA New Starts Program to obtain the 50% Federal funding share.
Dadeland South Intermodal Station	\$50,147,500	\$80,964,000	\$30,816,500	Budget increased to match the Design Build winning bid (negotiated amount).
Additional Elevators at Dadeland North Metrorail Station	\$5,560,000	\$6,308,000	748,000	Increase in design-build Construction Engineering & Inspection (CE&I) costs.
Metromover Comprehensive Wayside Overhaul	\$127,766,500	\$132,243,000	\$4,476,500	All Federal grants were not approved as forecasted and the difference was requested in local funds (PTP).
Acoustical Barrier Replacement	\$82,697,000	\$92,904,000	\$10,207,000	Construction cost escalations and inclusion of remaining one third barriers replacement that was not included in the original contract.
Expand the Bus Passenger Shelter Program throughout Miami-Dade County	\$12,586,000	\$29,506,000	\$16,920,000	Provide continuity to the Bus Passenger Shelters Installation program and support solutions to the Miami-Dade County Extreme Heat Action Plan. Purchase and Installation of 350 new cantilever bus stop protective roof structures and amenities in the Unincorporated Municipal Service Area (UMSA).
NW 37 Avenue from NW 79 Street to North River Drive - Widening from 2 to 5 lanes	\$20,250,000	\$21,852,000	\$1,602,000	Budget increased to match the construction contract bid awarded.
NE 2 Avenue from NE 91 Street to NE 20 Street - Street and Traffic Operational Improvements	\$30,913,400	\$35,428,000	\$4,514,600	Budget increased to match the contract bid awarded.

## DEFERRED COMPLETION

The FY 2024-28 Five-Year Plan Update reflects a number of PTP approved projects having estimated completion dates that differ one or more years than those projected in the previous year's Five-Year Plan Update.

Project Name	Completion Date FY 2023-27 Five-Year Plan	Completion Date FY 2024-28 Five-Year Plan	Reason for change in Completion Date
NW 37 Avenue from NW 79 Street to North River Drive - Widening from 2 to 5 lanes	August 2025	May 2026	Delay in procurement. (Contractor's community workforce plan was reviewed by Procurement Services Division).
Seal Gland Rehabilitation	September 2023	September 2024	Delay due to shortage of staff.
Metrorail Piers Coating	September 2023	September 2024	Delay due to shortage of staff.
Metrorail Vehicle Replacement	December 2022	November 2027	Warranty phase on-going till November 2027.
Metrorail Escalators Replacement and Elevators Refurbishment	January 2027	December 2027	Delay in procurement process.
Transit Oriented Development (TOD) Master Plan for South Corridor	September 2023	September 2024	NTP for the study was issued in June 2022. Schedule revised to accommodate time required to complete the study.
Transit Oriented Development (TOD) Master Plan for the Beach Corridor	October 2024	October 2025	Delay due to PSA contract capacity issue. Issue was resolved and NTP for the study is expected in first quarter of FY 2024. Completion date moved to address time needed to select consultant and complete the study.
SMART Plan Beach Corridor (Baylink)	December 2022	December 2024	Schedule revised to finalize NEPA and begin Request for Proposal Development.
SMART Plan East-West Corridor	December 2025	June 2028	TPO urged DTPW to reconsider the Locally Preferred Alternative (LPA). Additional time is to obtain direction from the TPO Board and to proceed with the project.
Transit Oriented Development (TOD) Master Plan for East-West Corridor	September 2022	September 2023	Study completed. Addressing FDOT comments and pending presentation to CITT, District Commissioners, and Committees.
SMART Plan Northeast Corridor Planning and PD&E	September 2024	September 2027	Project advanced to the next phase
Golden Glades Multimodal Transportation Facility (GGMTF) Technology Components	December 2023	December 2024	Delay due to pandemic supply chain issue.
NW 12 <sup>th</sup> Street Improvements	July 2024	September 2026	Push back from dolphin mall representatives resulted in a traffic study at the mall entrance delaying the plans submittal. Additional time

Project Name	Completion Date		Reason for change in Completion Date
	FY 2023-27 Five-Year Plan	FY 2024-28 Five-Year Plan	
			required to address FDOT comments on the permit application.
Additional Elevators at Dadeland North Metrorail Station	September 2025	September 2026	Delay in procurement.
Parking Garages Overhaul	September 2025	September 2026	Delay in procurement.
AC Unit Substations	September 2023	June 2025	Dependency on the Metrorail DC switchgear replacement project and delay in procurement. Schedule has been revised as indicated during last year's update.
10-15 Year Track and Guideway Rail Service Equipment Replacement	June 2023	June 2024	These funds are reserved for the purchase of Swing loader DTPW 59 22/23. The proposal was on hold with procurement.
Private Branch Exchange (PBX) Telephone System Upgrade to Voice Over Internet Protocol (VoIP) at all Transit Facilities	September 2023	September 2024	Fiber and copper cables material supply delays due to pandemic.
Government Station – Fire Suppression System	June 2025	February 2026	To implement the project along with the construction phase of the Metrorail Stations Refurbishments (Government Center) project.
Northeast Transit Hub Enhancements	August 2022	August 2024	Project reopened to complete the final phase (install CCTV system). New contract to be awarded.

In addition to the notable changes above, DTPW requested revision to the scope and title change of the Metrorail Station Refurbishments project. The additional scope includes assessment of the Metromover stations along with the Metrorail stations for safety, structural integrity, and longevity. The project title will be revised to 'Metrorail and Metromover Station Refurbishments'. There is no overall budget impact or timeline impact to the original project currently.