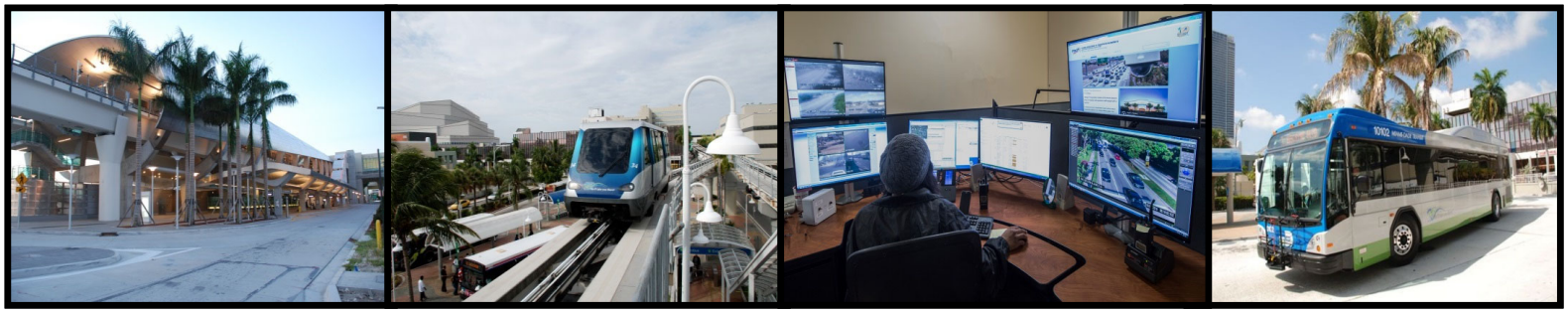
Miami-Dade County Overview:
Citizens' Independent Transportation Trust (CITT),
Charter County Transportation Surtax ("Half-Penny") &
People's Transportation Plan (PTP)

So. Fla. Transportation Surtax Roundtable
December 2021

Javier A. Betancourt
Executive Director
CITT



Citizens' Independent Transportation Trust (CITT)

Overview of the Transportation Trust

- **On November 5, 2002, Miami-Dade County voters approved an indefinite (no sunset provision) half-penny surtax to implement the People's Transportation Plan (PTP)**

- **The People's Transportation Plan (PTP) is a broad based and long-term program incorporating roadway and transit improvements**

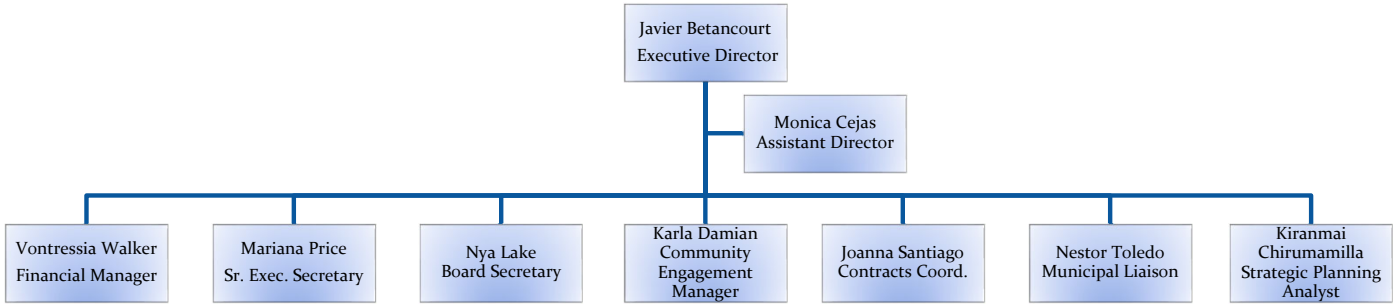
- **Voters also approved the creation of a Citizens' Independent Transportation Trust (Transportation Trust), an independent entity comprised of citizens who serve as volunteers with the mission to oversee expenditure of surtax revenue**

- **Mission: To monitor, audit, oversee and investigate the use of the Surtax proceeds and the implementation of the People's Transportation Plan (PTP).**

COUNTY	
County Transportation Expansion Question	
Shall the County implement the People's Transportation Plan including: Plans to build rapid transit lines to West Dade, Kendall, Florida City, Miami Beach and North Dade; expanding bus service; adding 635 buses; improving traffic signalization to reduce traffic backups; improving major and neighborhood roads and highways, including drainage; and funding to municipalities for road and transportation projects by levying a ½ percent sales surtax whose proceeds will be overseen by the Citizen's Independent Transportation Trust?	
YES	134
NO	135

Transportation Trust Oversight and Administration

Office of CITT



Function Areas:

- ❑ Project Review & Financial Analysis
- ❑ Strategic & Financial Planning
- ❑ Municipal Programs
- ❑ Community Engagement / Customer Advocate
- ❑ Budget & Accounting
- ❑ Audit (*contracted w Office of Audit & Management Services*)

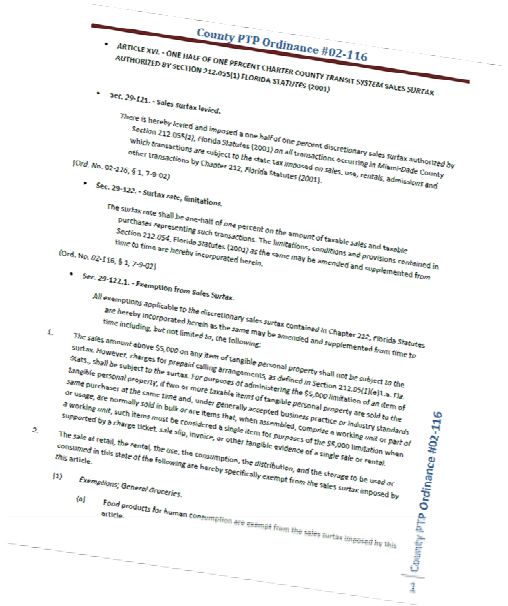
9 full-time positions; Exec. Dir. reports directly to CITT Board

$3M Operating Budget (less than 1% of annual surtax proceeds)

Our Guiding Documents

- ❑ F.S. 212.055
- ❑ PTP Ordinance #02-116
- ❑ CITT Ordinance #02-117
- ❑ CITT By-Laws

- ❑ Original PTP (Exhibit 1)
- ❑ 5 Year Implementation Plan


County PTP Ordinance #02-116

ARTICLE XVI. - ONE HALF OF ONE PERCENT CHARTER COUNTY TRANSIT SYSTEM SALES SURTAX AUTHORIZED BY SECTION 212.055(1) FLORIDA STATUTES (2001)

Sec. 29-121. - Sales surtax levied.

There is hereby levied and imposed a one half-of one percent discretionary sales surtax authorized by Section 212.055(2), Florida Statutes (2001) on all transactions occurring in Miami-Dade County which transactions are subject to the state tax imposed on sales, use, rentals, admissions and other transactions by Chapter 212, Florida Statutes (2001).

(Ord. No. 02-116, § 1, 7-9-02)

Sec. 29-122. - Surtax rate, limitations.

The surtax rate shall be one-half of one percent on the amount of taxable sales and taxable purchases representing such transactions. The limitations, conditions and provisions contained in Section 212.054, Florida Statutes, (2002) as the same may be amended and supplemented from time to time are hereby incorporated herein.

(Ord. No. 02-116, § 1, 7-9-02)

Sec. 29-122.1. - Exemption from Sales Surtax.

All exemptions applicable to the discretionary sales surtax contained in Chapter 212, Florida Statutes are hereby incorporated herein as the same may be amended and supplemented from time to time including, but not limited to, the following:

1. The sales amount above $5,000 on any item of tangible personal property shall not be subject to the surtax. However, charges for prepaid calling arrangements, as defined in Section 212.05(1)(e)1.a. Fla. Stats., shall be subject to the surtax. For purposes of administering the $5,000 limitation of an item of tangible personal property, if two or more taxable items of tangible personal property are sold to the same purchaser at the same time and, under generally accepted business practice or industry standards or usages, are normally sold in bulk or are items that, when assembled, comprise a working unit or part of a working unit, such items must be considered a single item for purposes of the $5,000 limitation when supported by a charge ticket, sale slip, invoice, or other tangible evidence of a single sale or rental.

3. The sale at retail, the rental, the use, the consumption, the distribution, and the storage to be used or consumed in this state of the following are hereby specifically exempt from the sales surtax imposed by this article.

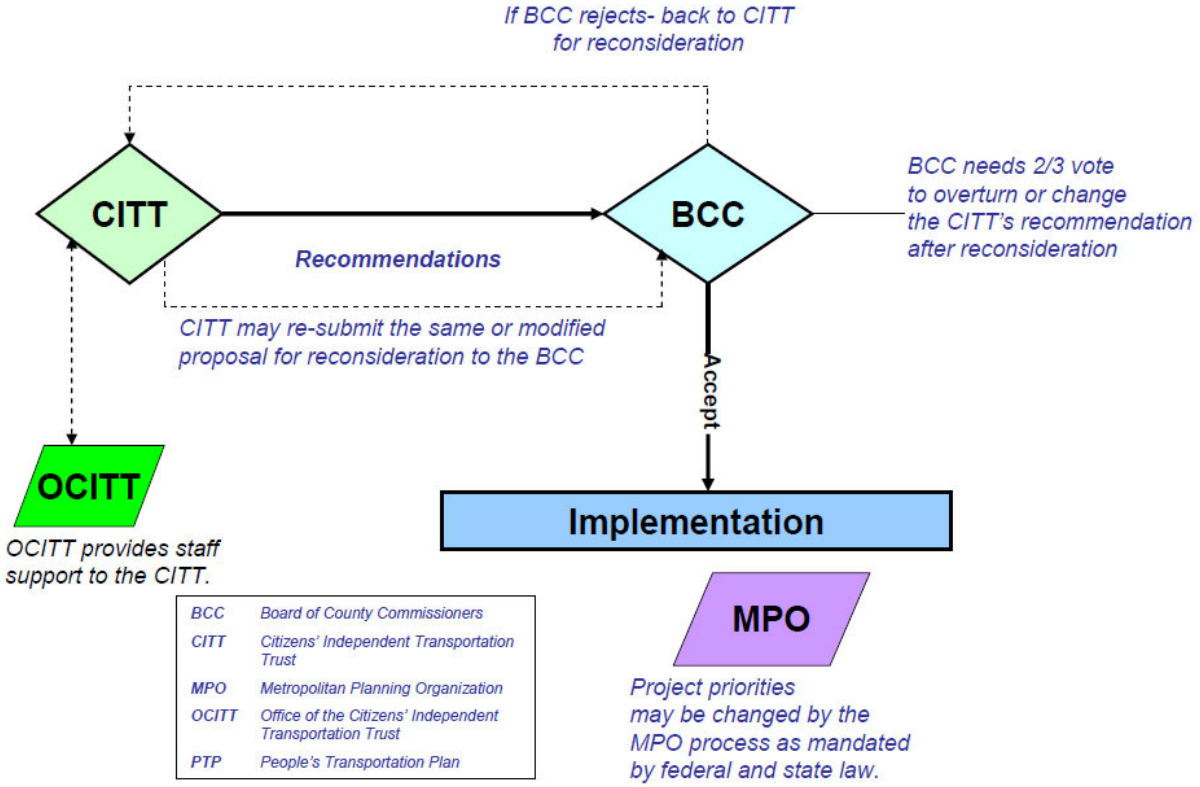
(1) Exemptions; General groceries.

(a) Food products for human consumption are exempt from the sales surtax imposed by this article.

County PTP Ordinance #02-116

Project Review & Approval Process

PTP Amendments and Project Recommendations



BCC	Board of County Commissioners
CITT	Citizens' Independent Transportation Trust
MPO	Metropolitan Planning Organization
OCITT	Office of the Citizens' Independent Transportation Trust
PTP	People's Transportation Plan

Audits

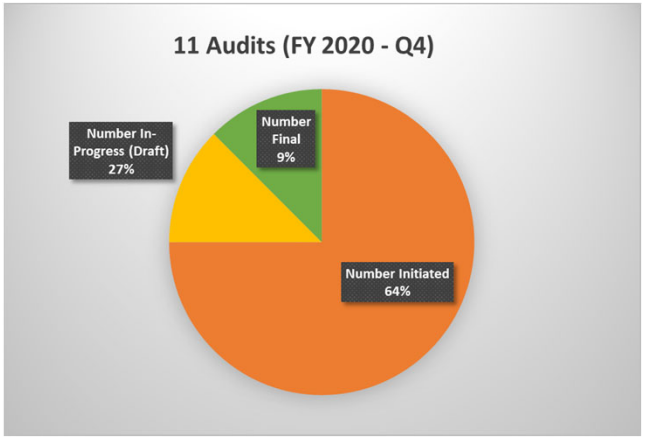
2020 - 4th Quarter (July 1, 2020 - Sept 30, 2020) As of 10/30/2020					
Municipality	Last Final Audit	Next Audit	Initiated	In Progress (Draft)	Final
MUNICIPALITY					
Aventura	1/19/2017	2020	8/20/2018	on-hold	-
Bal Harbour%	12/14/2018	2021	-	-	-
Bay Harbor Islands	2/28/2019	2021	-	-	-
Biscayne Park^	12/14/2018	2021	-	-	-
Coral Gables	5/26/2020	2023	-	-	-
Cutler Bay	6/13/2019	2022	-	-	-
Doral	4/3/2019	2022	-	-	-
El Portal	11/13/2017	2020	7/24/2019	-	-
Florida City*	6/25/2019	2021	-	-	-
Golden Beach	12/10/2019	2022	-	-	-
Hialeah	1/28/2020	2022	-	-	-
Hialeah Gardens	2/8/2019	2021	-	-	-
Homestead	8/5/2019	2021	-	-	-
Key Biscayne	10/30/2019	2022	-	-	-
Medley	4/18/2017	2020	7/16/2020	-	-
Miami	10/1/2019	2020	7/24/2019	8/11/2020	-
Miami Beach	9/19/2019	2022	-	-	-
Miami Gardens	12/20/2018	2021	-	-	-
Miami Lakes	7/28/2020	2023	7/24/2019	6/25/2020	7/28/2020
Miami Shores	10/16/2019	2022	-	-	-
Miami Springs	10/16/2017	2020	7/24/2020	10/5/2020	-
North Bay Village	3/1/2019	2021	-	-	-
North Miami	10/1/2019	2022	-	-	-
North Miami Beach	10/1/2019	2022	-	-	-
Opa-Locka^	1/24/2020	2020	7/16/2020	-	-
Palmetto Bay	5/28/2019	2022	-	-	-
Pinecrest	8/22/2018	2021	-	-	-
South Miami	5/10/2018	2021	-	-	-
Sunny Isles Beach	6/16/2017	2020	7/16/2020	-	-
Surfside	12/5/2019	2022	-	-	-
Sweetwater***	6/5/2019	2021	-	-	-
Virginia Gardens	11/19/2018	2021	-	-	-
West Miami	11/20/2017	2020	7/16/2020	-	-
COUNTY					
Transit	8/14/2018	2020	7/16/2020	9/23/2020	-
Public Works	8/14/2018	2020	7/16/2020	-	-
			7	3	1

AUDIT AND MANAGEMENT SERVICES

Cathy Jackson
Director

Overtown Transit Village North
701 NW 1st Court, Miami, FL 33136
786-469-5900 | bemor@miamidade.gov

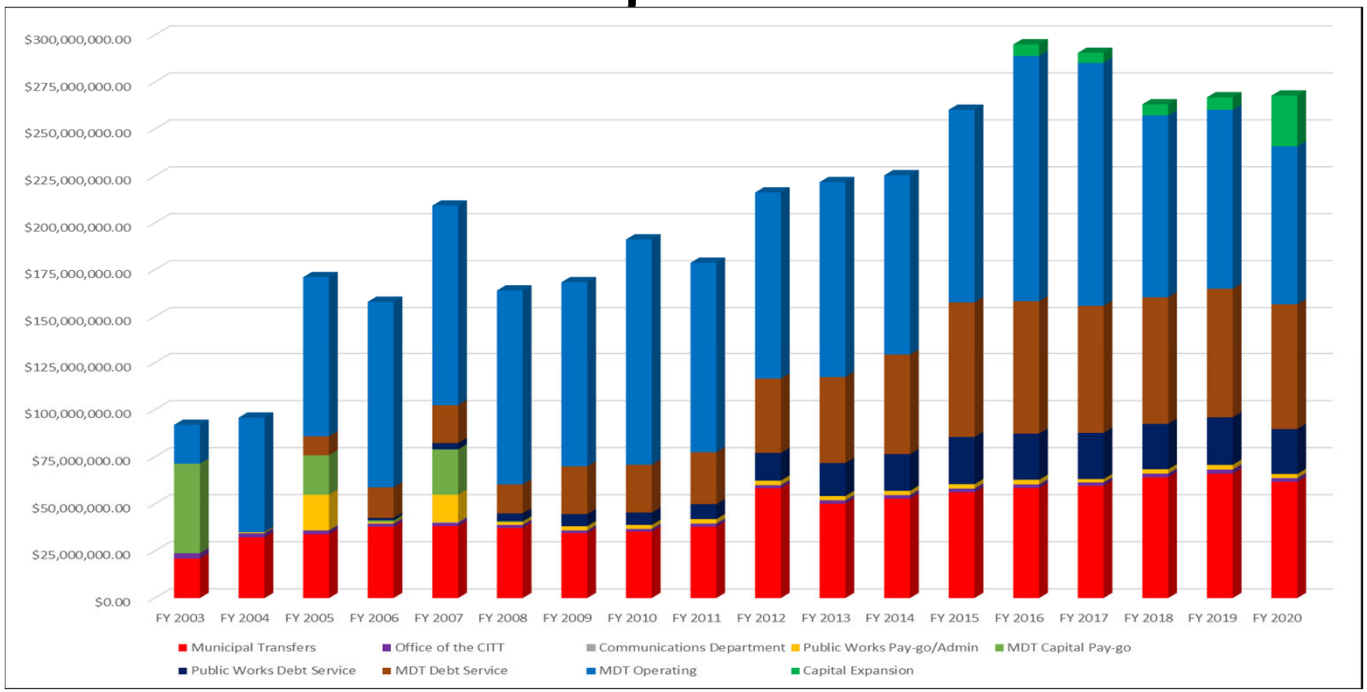
Contact Us



Strategic Planning & Analysis

Charter County Transportation Surtax
(Half-Penny)

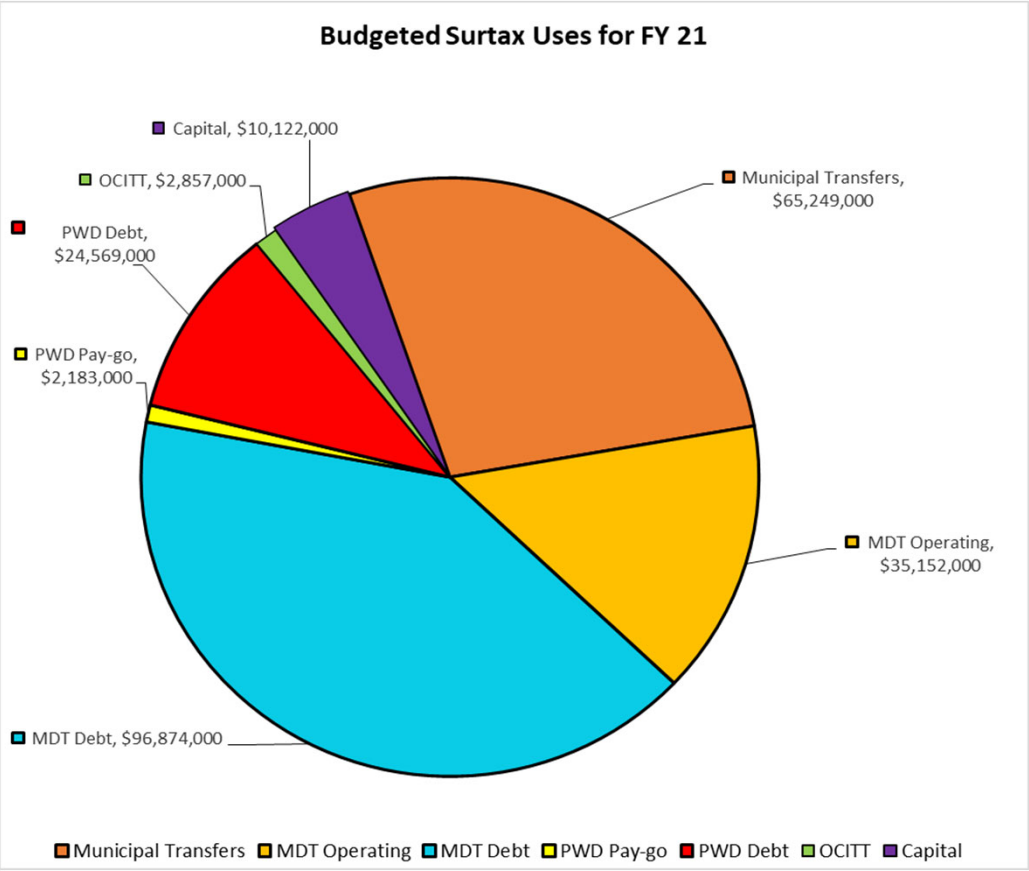
Surtax Expenditures



Approx. **$3.7 billion** of Sales Surtax Revenue has been collected since 2002 and distributed as follows:

- 67% / $2.4 billion to Miami-Dade Transit (capital, debt service and operations)
- 23% / $836 million to Municipalities
- 8% / $293 million to Public Works (capital, debt service and operations)
- 1% / $51 million Capital Expansion
- 1% / $33 million to CITT for Administration

Surtax Collections & Expenditures - ANNUAL



Projected FY 2021 Surtax Collections: $**298M***

**Source FY 2021 ProForma*

People's Transportation Plan (PTP)

PTP Promises (Exhibit 1)

EXHIBIT 1
PEOPLE'S TRANSPORTATION PLAN

YEAR 2003–2008: BUS SERVICE IMPROVEMENTS (Capital Cost: $90 million)

- Increases bus fleet from 700 to 1335.
- Increases current service miles from 27 million miles to 44 million miles.
- Increases operating hours from 1.9 million hours to 3.3 million hours.
- Utilizes minibuses on **all new** bus routes and in neighborhood/municipal circulator shuttle service.
- **Adds mid-day, Saturday and Sunday services** within 30-days of approval of a dedicated funding source using existing buses.
- **Provides 15-minutes or better bus** service during rush hour; 30-minutes or better during other periods; 24-hour service in certain major corridors.
- **Replaces buses on a systematic basis** to reduce operating cost and increase reliability.
- **Constructs bus pull-out bays** on major streets to expedite traffic flow.
- **Implements grid system** for bus service (north-south and east-west) on major streets and avenues with circulator service feeding main line bus service and rapid transit lines.
- **Expands the bus shelter program** throughout the County.
- **Enhances and expands transit bus stop signage** countywide; incorporate information technology at bus stop and rail stations.
- **Expands Transit's public information program** through enhanced marketing and advertising.
- **Expands** on successful **municipal circulator** program.

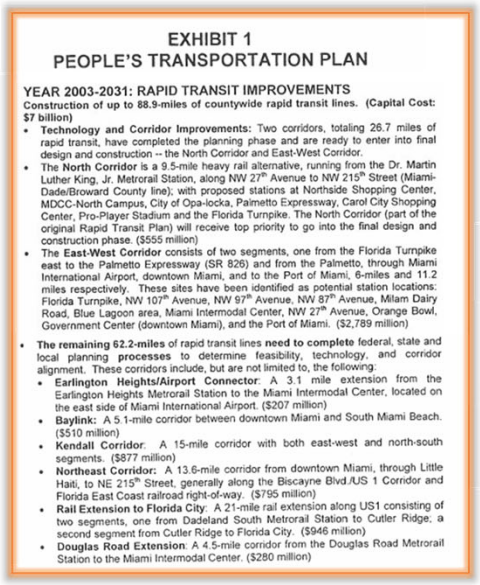


EXHIBIT 1
PEOPLE'S TRANSPORTATION PLAN

YEAR 2003-2031: RAPID TRANSIT IMPROVEMENTS
Construction of up to 88.9-miles of countywide rapid transit lines. (Capital Cost: $7 billion)

- **Technology and Corridor Improvements:** Two corridors, totaling 26.7 miles of rapid transit, have completed the planning phase and are ready to enter into final design and construction -- the North Corridor and East-West Corridor.
- The **North Corridor** is a 9.5-mile heavy rail alternative, running from the Dr. Martin Luther King, Jr. Metrorail Station, along NW 27th Avenue to NW 215th Street (Miami-Dade/Broward County line); with proposed stations at Northside Shopping Center, MDCC-North Campus, City of Opa-locka, Palmetto Expressway, Carol City Shopping Center, Pro-Player Stadium and the Florida Turnpike. The North Corridor (part of the original Rapid Transit Plan) will receive top priority to go into the final design and construction phase. ($555 million)
- The **East-West Corridor** consists of two segments, one from the Florida Turnpike east to the Palmetto Expressway (SR 826) and from the Palmetto, through Miami International Airport, downtown Miami, and to the Port of Miami, 6-miles and 11.2 miles respectively. These sites have been identified as potential station locations: Florida Turnpike, NW 107th Avenue, NW 97th Avenue, NW 87th Avenue, Milam Dairy Road, Blue Lagoon area, Miami Intermodal Center, NW 27th Avenue, Orange Bowl, Government Center (downtown Miami), and the Port of Miami. ($2,789 million)
- **The remaining 62.2-miles** of rapid transit lines **need to complete** federal, state and local planning **processes** to determine feasibility, technology, and corridor alignment. These corridors include, but are not limited to, the following:
  - **Earlington Heights/Airport Connector**: A 3.1 mile extension from the Earlington Heights Metrorail Station to the Miami Intermodal Center, located on the east side of Miami International Airport. ($207 million)
  - **Baylink:** A 5.1-mile corridor between downtown Miami and South Miami Beach. ($510 million)
  - **Kendall Corridor**: A 15-mile corridor with both east-west and north-south segments. ($877 million)
  - **Northeast Corridor:** A 13.6-mile corridor from downtown Miami, through Little Haiti, to NE 215th Street, generally along the Biscayne Blvd./US 1 Corridor and Florida East Coast railroad right-of-way. ($795 million)
  - **Rail Extension to Florida City**: A 21-mile rail extension along US1 consisting of two segments, one from Dadeland South Metrorail Station to Cutler Ridge; a second segment from Cutler Ridge to Florida City. ($946 million)
  - **Douglas Road Extension**: A 4.5-mile corridor from the Douglas Road Metrorail Station to the Miami Intermodal Center. ($280 million)

EXHIBIT 1
PEOPLE'S TRANSPORTATION PLAN

YEAR 2003-2013: MAJOR HIGHWAY AND ROAD IMPROVEMENTS (Total Cost: $309 million)

NOTE: This **Exhibit 1** includes those projects listed on the attached 3 pages entitled "Board Requested Major Roadway and Neighborhood Improvement Projects for Inclusion in the People's Transportation Plan."

EXHIBIT 1
PEOPLE'S TRANSPORTATION PLAN

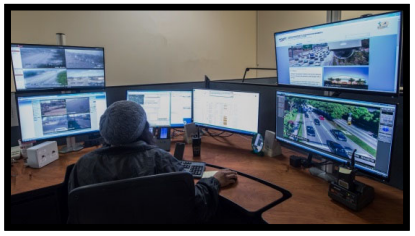
MUNICIPAL IMPROVEMENTS (Cities to receive a pro rata share (determined by population) of 20% total surtax revenues on an annual basis (currently estimated at $62.6 million [one-percent] or $31.3 million [one-half percent])

Bus Service | Rapid Transit | Major Highway & Road | Municipal

ALSO…

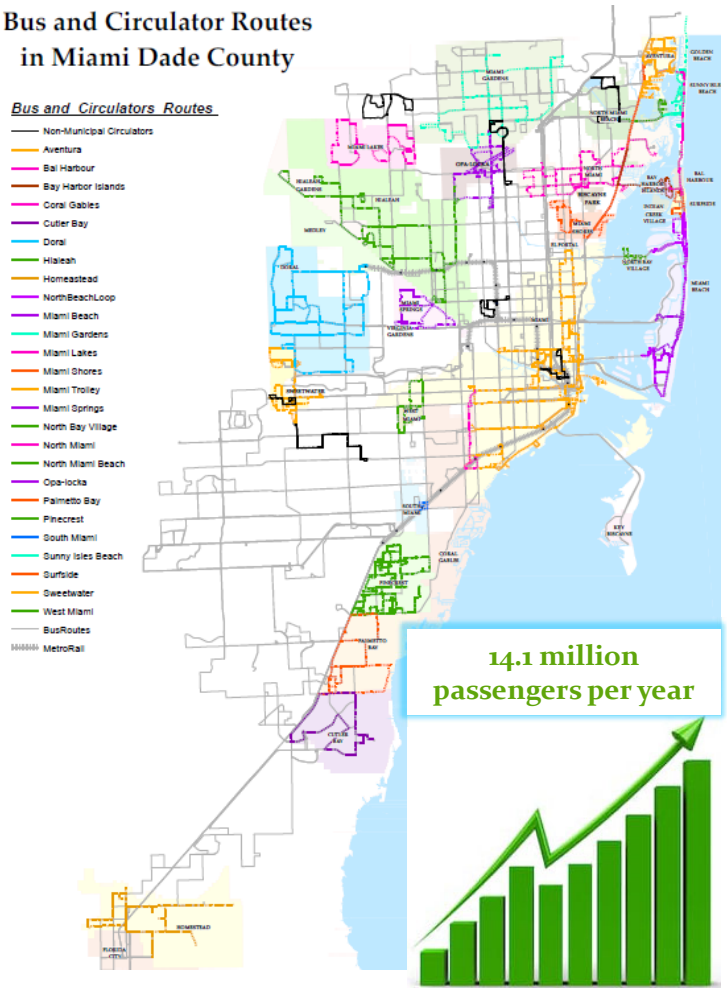
- ✓ Maintenance of Effort (MOE)
- ✓ Golden Passport (Fare-free transit for ALL seniors)
- ✓ Fare-free Metromover
- ✓ Neighborhood Improvement Program (distribution to Commission Districts)

Progress To-Date



Promises Fulfilled: Municipal Program

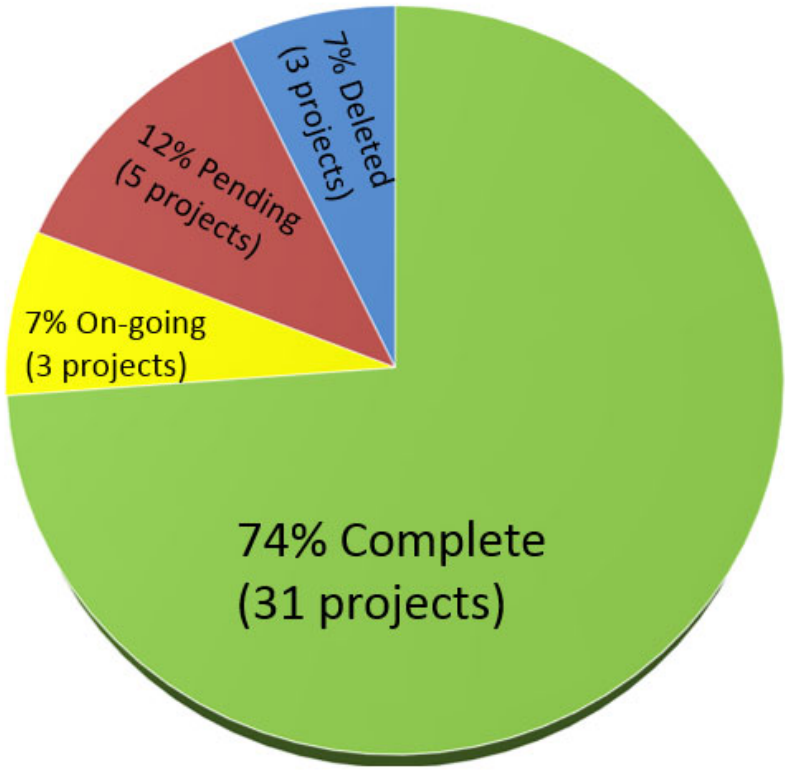
Bus and Circulator Routes in Miami Dade County



14.1 million passengers per year

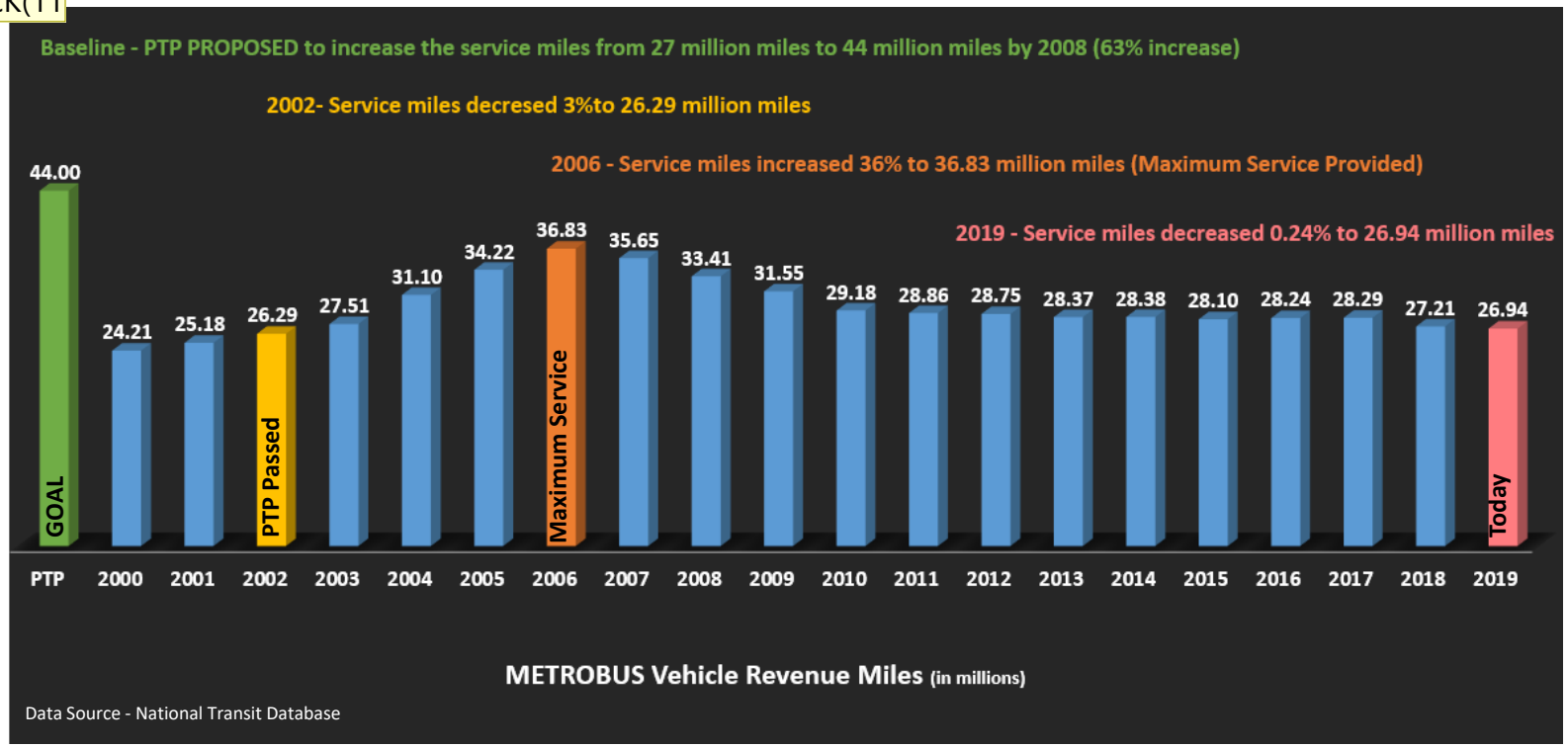
MUNICIPALITY	CIRCULATOR	ON-DEMAND
Aventura	✓	✗
Bal Harbour	✓	✗
Bay Harbor Islands	✓	✗
Biscayne Park	✗	✗
Coral Gables	✓	✓
Cutler Bay	✓	✗
Doral	✓	✓
El Portal	✗	✗
Florida City	✗	✓
Golden Beach	✗	✗
Hialeah	✓	✗
Hialeah Gardens	✓	✗
Homestead	✓	✗
Indian Creek	✗	✗
Key Biscayne	✓	✓
Medley	✓	✗
Miami	✓	✓
Miami Beach	✓	✓
Miami Gardens	✓	✗
Miami Lakes	✗	✓
Miami Shores	✓	✗
Miami Springs	✓	✗
North Bay Village	✓	✓
North Miami	✓	✗
North Miami Beach	✓	✗
Opa-Locka	✓	✗
Palmetto Bay	✓	✓
Pinecrest	✓	✓
South Miami	✗	✓
Sunny Isles Beach	✓	✗
Surfside	✓	✗
Sweetwater	✓	✗
Virginia Gardens	✓	✗
West Miami	✗	✓

Promises Fulfilled:
Major Roadway, Highway & Neighborhood Improvements



“Unfulfilled Promises”: Enhanced Bus Service

CK(11

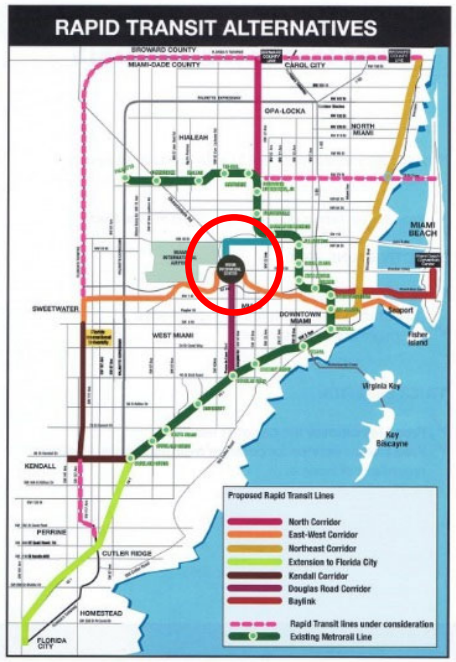


Data Source - National Transit Database

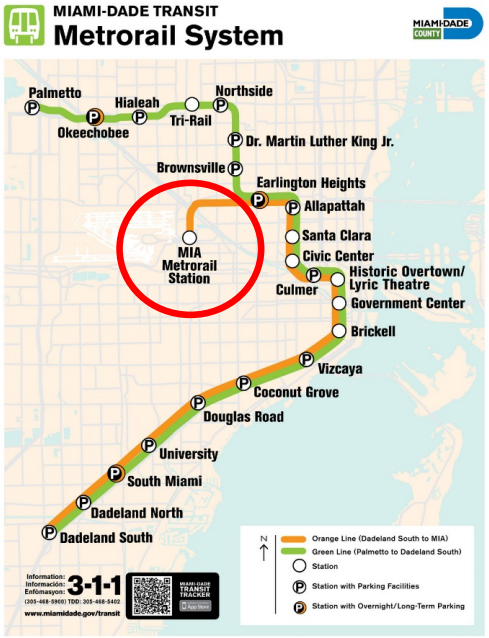
“Unfulfilled Promises”: Rapid Transit Corridors

BEFORE

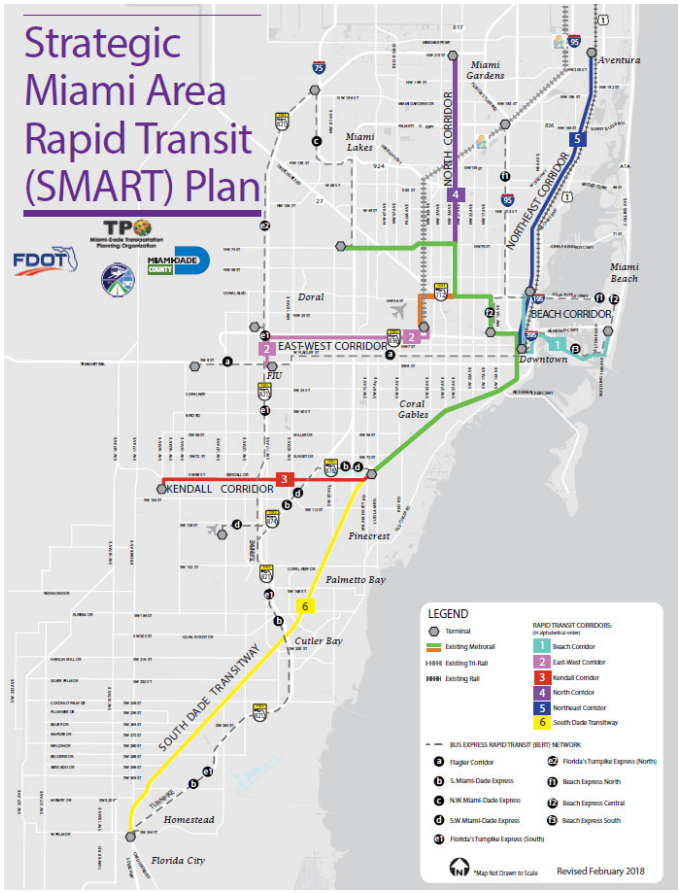
THE PROMISE



THE RESULT



The Future: *Enter The SMART Plan*



SMART Plan Corridors

- **Six (6) Rapid Transit Corridors**
  - ✓ Beach
  - ✓ East-West
  - ✓ Kendall
  - ✓ North
  - ✓ Northeast
  - ✓ South

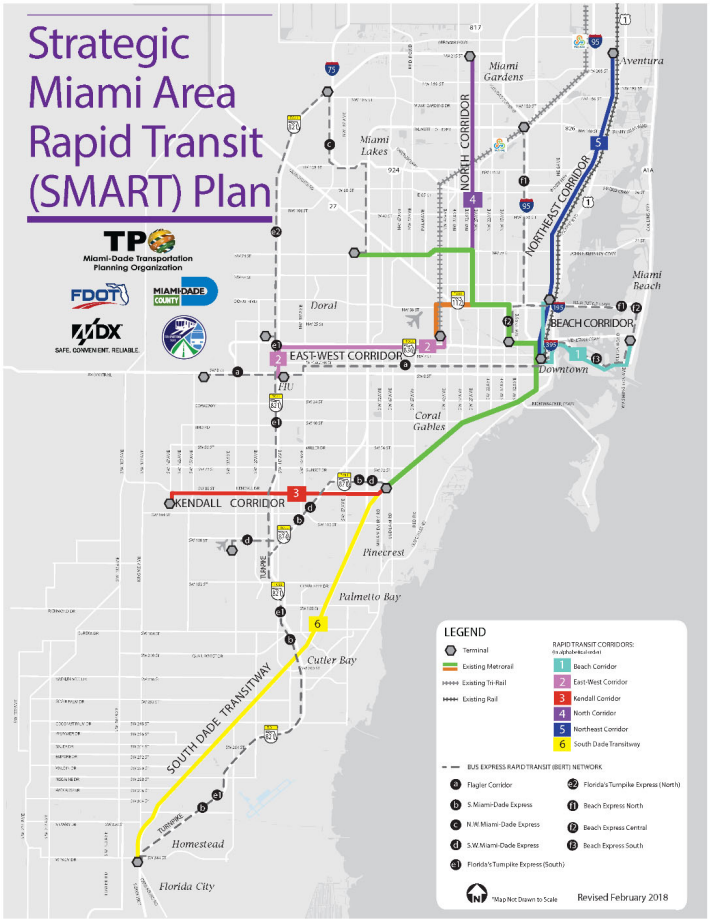
  (1) Project Development & Environment Phase

  (2) Implementation Plan for each corridor

- **Six (6) Bus Express Rapid Transit Corridors**
  - ✓ Beach Express
  - ✓ Flagler Street
  - ✓ Florida Turnpike
  - ✓ NW Miami-Dade Express
  - ✓ S Miami-Dade Express
  - ✓ SW Miami-Dade Express

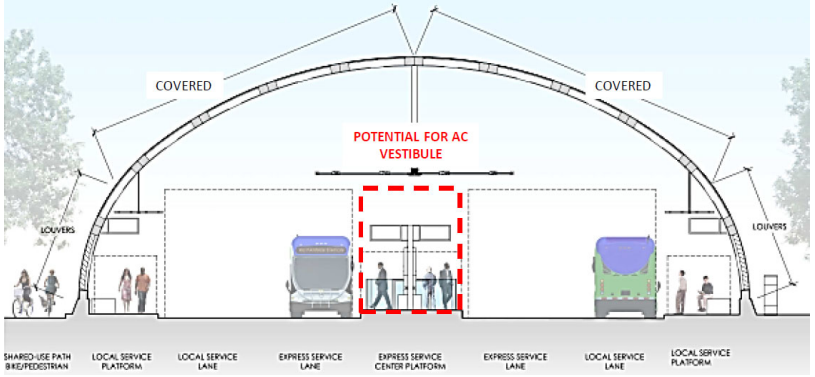
  Over 90 miles of express bus network

- **Supported by the CITT, MPO, Miami-Dade County, Municipalities, State and multiple entities**

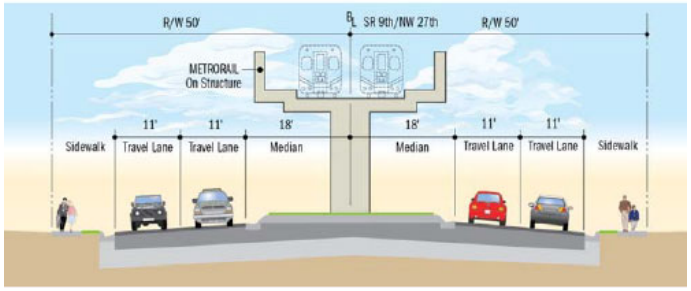


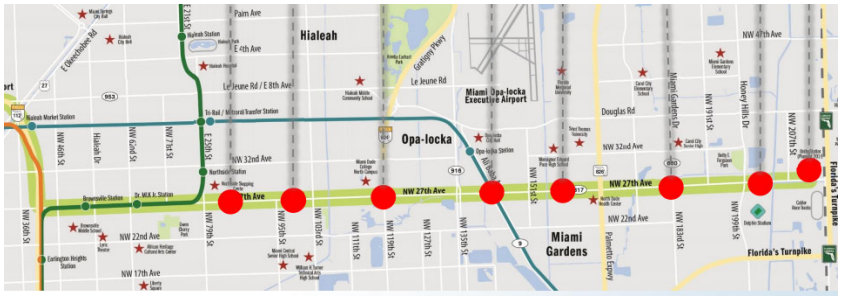
Projects in Progress

South Dade: Bus Rapid Transit (BRT) – Design Build contractor selection in progress



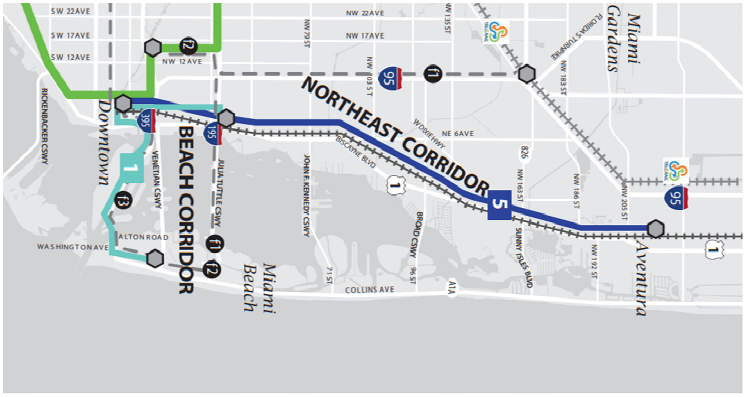
North Corridor (27th Ave) : Elevated Rail (pending final selection of technology by TPO and procurement process by DTPW)



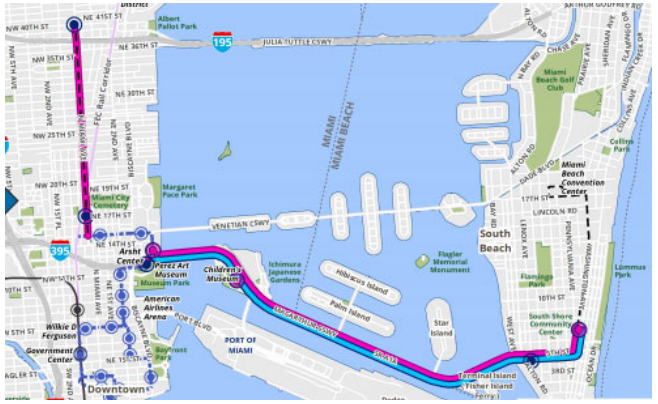


Projects in Progress

NE Corridor: Commuter Rail – Aventura Station ROW acquired and permitting in progress



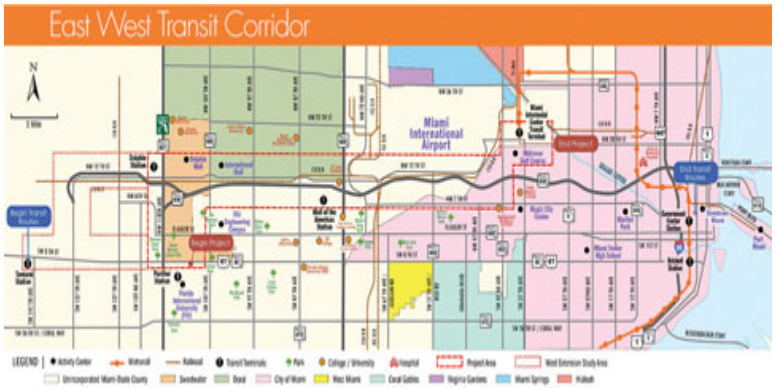
Beach Corridor: APM/Monorail – Engineering plans and environmental permitting in progress



Projects in Progress

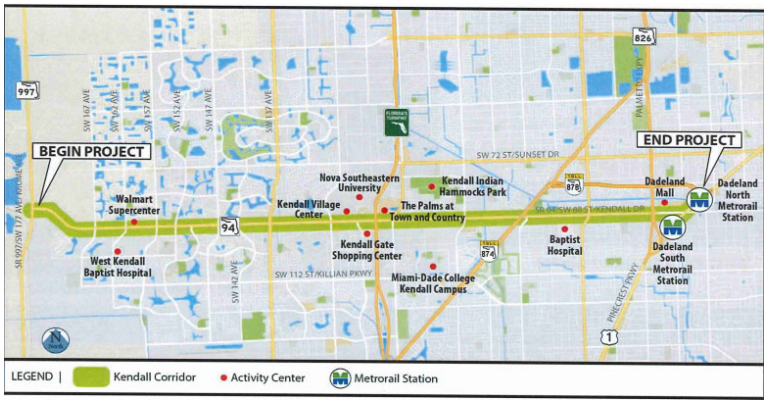
East/West Corridor: BRT

CK(13



Kendall Corridor: TBD

CK(14



Funding Lasagna

Potential Sources of Funding

- PTP Surtax / half-penny
  - Capital Expansion Reserve Fund
  - Future Uncommitted Proceeds
  - Municipal Share
- TPO Flexed SU Grant
- State/Federal Grants
- Toll Revenue
  - MDX
  - Florida's Turnpike
  - Express Lanes
- Local Option Gas Tax
  - Restoration of 2 cents
- Parking Revenue

- Value Capture Districts
  - Tax Increment Financing (TIF) District
  - Special Assessment Districts
  - CRAs
- Public/Private Partnerships
  - Brightline
  - TODs / Adopt-a-Station
  - Port Tunnel Model (availability payments)

Additional Areas of Focus

1st/Last Mile Solutions (Bike/Ped, On-Demand…)

Enhancing County/Municipal Connectivity

Improving the Customer Experience (Maintenance, Cleanliness, Performance…)

Community Engagement