

Pre-Meeting Email/FAX-back Survey for the Florida Rail Stakeholder Advisory Committee

SURVEY RESULTS

In a facilitated consensus building process, a Florida Rail Stakeholder Advisory Committee made up of key public and private rail system stakeholders will develop advisory recommendations to inform and guide the development of the policy element of the Florida Rail System Plan. The Committee will develop its recommendations over the course of four meetings between July and October 2008 and present its final recommendations to the Secretary of FDOT in December 2008.

Prior to the first organizational meeting of the Florida Rail Stakeholder Advisory Committee, members received a pre-meeting survey designed to solicit an initial set of key issues and questions that need to be addressed from the Advisory Committee members and their designees. Members were asked to review and consult with others in their organizations as needed. **The survey responses have been compiled without attribution, will be reviewed by the full committee and serve as the basis for discussion at the organizational meeting.**

THE FOLLOWING MEMBERS (OR THEIR ORGANIZATION) SENT REPLIES IN TIME TO BE INCORPORATED INTO THE MEETING MATERIALS:

Bruno Barreiro South Florida Regional Transportation Authority
Ben Biscan Florida Railroad Association
Denise Bunnewith MPOAC
Lee Chira High Speed Rail Authority
Tom Eschenberg Florida League of Cities
John Friedmann Norfolk Southern
Marion Hart FDOT
Debbie Hunt FDOT
Richard Kaplan MPOAC
Jeff Koons Palm Beach County Commission
Lisa Mancini CSX
Sally Mann Dept. of Environmental Protection
Miami-Dade Transit
Scott Paine Citizen
Tom Pelham Florida Department of Community Affairs
Mary Lou Rachel Florida Trucking Association
David Rohal Florida East Coast Railway
Don Skelton FDOT
James Wolfe FDOT District 4

THE SURVEY RESPONSES →

RSAC PRE-MEETING SURVEY SUMMARY

Tailwinds (internal strengths and external opportunities): *From your perspective, list below the key tailwinds (i.e. the forces aiding the State and its stakeholders) in addressing and meeting key rail system needs statewide?*

Member responses to the pre-meeting survey have been compiled below and grouped together under summary statements created by the facilitators to aid in review and discussion of the key trends identified by the members:

- a. **A number of factors are contributing to making the movement of people and goods by road more expensive and less desirable -- high fuel prices, greater road congestion, longer travel times, and environmental (especially climate change) concerns.**
 - Increased cost of moving freight by truck.
 - Fuel prices.
 - Gas Prices.
 - Fuel costs.
 - Rising gas prices leading to increasing interest in rail transit.
 - Alternative modes of transportation are becoming more expensive than rail.
 - Economic forces that are creating a higher cost of commuting.
 - Timing is good – fuel prices are high making rail transit an attractive alternative.
 - Increased travel time for trucks due to roadway congestion.
 - Traffic load on roads.
 - Higher fuel prices, increasing environmental concerns, and continued growth in Florida all contribute to elevating the need for rail service, including passenger and commuter rail.
 - Increased travel time for trucks due to roadway congestion.
 - Increasing highway and road congestion and the corresponding cost of adding capacity.
 - Time spent commuting, affecting personal time and public dissatisfaction with existing conditions, reduced productivity and additional fuel wasted in traffic.
 - Growth, leading to increased traffic congestion, and the need or importance for more mass transportation.
 - Air quality (ozone standards) increase and CO₂/greenhouse gas/climate change concerns make rail an attractive alternative to heavy diesel trucks and the automobile.
 - Governor's climate change and energy initiatives.
 - Clearly perceived need. Non-rail passenger and freight has a declining level of service and there is a growing consensus that increased rail is needed.

- b. **These same factors have made the public increasingly aware and desirous of the benefits of rail, and are leading to its increased use.**
 - Growth in commuter rail and transit ridership.
 - Growth in commuter rail and transit ridership.
 - Growing interest in commuter rail, transit, and multi-modal transportation systems.

- Current rise in fuel prices has created an increased public awareness and desire for alternate modes of transportation and shipping.
 - Clearly perceived need. Non-rail passenger and freight has a declining level of service and there is a growing consensus that increased rail is needed.
 - Rail freight is increasing
 - Increased desire to have rail options for commuters
 - Some public enthusiasm for intra-city and inter-city passenger rail service development/expansion.
 - Lower cost and higher capacity of rail for freight.
 - Increasing interest in more cost-effective, fuel-efficient freight and passenger transportation.
 - Perhaps the most important external opportunity is the strong public support for future mobility alternatives to the automobile. Higher fuel prices, a concern for the global environment, concern over diminished quality of life associated with “paving over Florida with roads,” and the hassles associated with air travel have combined to create a powerful sentiment that now is the time to invest in rail to ensure a better future for Florida’s citizens.
 - General interest in maintaining rail systems and expanding by stakeholders and the business community.
 - Higher personal transportation costs has raised the awareness to the general public of the necessity of rail both passenger and freight.
- c. **Florida is moving toward development concepts that emphasize urban centers and greater density, which makes rail more feasible for passenger travel.**
- Development concepts envisioning population centers connected with transportation corridors.
 - Long-term Florida will attract many new residents. Future tax revenues and density will help grow freight and passenger rail business.
 - The Governor's Blueprint for Florida's Innovation Economy, which includes sustainable growth and multi-modal transportation as economic drivers.
 - Growing interest in utilizing rail transit as a growth management tool to encourage urban infill and redevelopment, transit-oriented development, reduce greenhouse gas emissions, and better integrate transportation and land use planning.
- d. **Florida has robust infrastructure and available right-of-way for expansion. This means capacity increases can be accomplished quickly with little additional permitting.**
- Robust infrastructure and availability of former ROW for expansion.
 - The State has an existing network of railroads that can in many locations be expanded to add capacity for freight and passengers. Although capacity expansion is costly, it is far cheaper and easier to permit than additional new railroad capacity.
 - Multiple railroads.
 - Capacity increases require little if any oversight/permitting, can be accomplished immediately with little environmental impact.
 - Spread rail freight load to relieve congestion.

- Florida is an urban high growth state having a need to: 1) Maximize the use of existing infrastructure; 2) Prioritize investments to enhance existing infrastructure; 3) Prioritize investments in new infrastructure; and 4) Facilitate the identification and elimination of critical check-points that impede the movement of people and goods between the various modes of transportation.
- e. **The railroads are interested in cooperating with FDOT.**
 - Railroads in the state are cooperative and work well with FDOT.
- f. **We continue to have growth in international trade and the ports that service them.**
 - Good Port access (Global markets), fuel prices, highway congestion.
 - Growth in international trade and the ports of Jacksonville and Miami.
- g. **Private investment allows the state to leverage its efforts.**
 - The State holding an equity interest in the projects protects the taxpayer's investment.
 - Private investment in freight capacity allows state to leverage its funds.
- h. **Florida has a progressive DOT that is interested in rail, and that has successful experience with inclusive statewide planning processes.**
 - Florida has a progressive DOT that is already investing a portion of the State's transportation budget on rail.
 - Experience with inclusive statewide transportation planning processes.
 - Strategic Intermodal System program
 - Commitment to multimodalism with emphasis both on freight and passengers.
 - Dedicated staff.
- i. **We have continuing dedicated funding.**
 - Continued dedicated funding.
 - Dedicated budget
 - Direct funding of rail improvements
- j. **Florida has a successful example of commuter rail on which to draw.**
 - Florida has a 20-year successful commuter operation in Tri-rail that shares capacity with freight rail.

RSAC PRE-MEETING SURVEY SUMMARY

Headwinds (internal weaknesses and external challenges): *From your perspective, list below the key headwinds (i.e. the forces hindering the State and its stakeholders) in addressing and meeting key rail system needs statewide?*

Member responses to the pre-meeting survey have been compiled below and grouped together under summary statements created by the facilitators to aid in review and discussion of the key trends identified by the members:

a. There is a lack of political consensus on rail priorities.

- Lack of political consensus on rail priorities

b. There is uneven support for rail at the local level, state policies favor roads over highways, and Federal priorities adversely affect transit agencies.

- Uneven local support for rail-based investments.
- Lack of federal and state support for passenger rail.
- Federal priorities on funding and legislation that adversely affect transit agencies. Imbedded funding policies of the State Department of Transportation System are heavily skewed towards building roads and highways.
- Despite its name, FDOT's Strategic Intermodal System has funding policies that heavily favor roads, including only funding rail projects at 50%, while roads are funded at 100%.
- Lobbies for the road building industries will likely oppose a significant shift in state policy to favor rail over road construction.
- Externally, national rail funding must be increased.
- The state of Florida should encourage Congress to pass new legislation to assist in the development of rails corridors nationally, much like the old interstate highway system.
- Rail should become a priority over roads for funds.

c. We lack adequate infrastructure.

- Existing rail lines are old, and have maintenance and safety issues.
- We don't have sufficient corridors in urban areas, and the cost of acquiring land for new urban corridors is extremely high.
- New intercity corridors are likely to raise environmental concerns, especially over large expanses of wetlands.

Yet without new infrastructure, the freight corridors in many parts of the state will have trouble serving passengers.

- Lack of corridors or rights-of-way in urban areas.
- Cost of land in urban areas.
- Environmental concerns where new track is proposed.
- Age of existing rail lines - maintenance and safety issues if use increased.
- The geography/topography of the state presents serious problems. Much of the State is wet, and construction of rail infrastructure is likely to face environmental challenges.
- Without new infrastructure, freight corridors in many parts of the state can't support passengers.

- d. No matter how many factors are pointing towards rail, the automobile-centered economy has enormous momentum.**
- Lingering momentum and institutions of an automobile-centric economy.
- e. We don't have the links we need between rail and other modes.**
- Local cooperation - linkage from train station with other transportation and rivalry over passenger station location
 - Lack of port-rail connections in urban areas - no available land for expansion.
 - Lack of complementary mobility options.
- f. Success requires coordinating the efforts of many partners with different interests.**
- Consensus from all groups (social, environmental), public investment in private business, slowing growth.
 - Lack of understanding of the basic objectives driving stakeholders' interests.
 - Many partners with different interests.
 - Compatibility between local, region and statewide visions. □
 - Compatibility between local, region and statewide/development processes.
- g. Funding, funding, funding. The economy right now is failing. There are serious fiscal issues at the state and local levels of government, funding is scarce, and the political will to find the funding to meet any state needs is uncertain.**
- Funding.
 - Funding.
 - Funding.
 - Funding.
 - Funding, funding, funding.
 - State funding.
 - Cost.
 - Funding - local, state and federal.
 - Potential unavailability of funding.
 - Inadequate funding for transportation.
 - Failing economy.
 - Lack of any governmental funding to the point that it is counter-productive.
 - The mantra of "NO NEW TAXES."
 - Serious fiscal issues at state and local levels of government.
 - Totally broken state-level taxation system.
 - General aversion among major interest advocates as well as elected officials (especially state) to securing revenues adequate to meet any of this state's needs.
 - Currently, budget shortfalls are a problem.
 - There are several internal areas that need to be addressed to provide a positive environment within which rail passenger transportation can flourish. Another internal Florida issues is funding. While there seems to be public support for funding rail, a statewide system requires statewide funding and support from FDOT and legislature.

- A dedicated source of funding is critical for passenger rail in order to successfully compete for funds at the national and state levels.
 - The state should not mandate a statewide rail system without statewide financial support and expect local governments to find funding.
 - Funding priorities and shortfalls.
 - Direct Funding out of Railroad Revenues. □
 - Deficit Reduction.
- h. The start-up costs of new service are high.**
- The expense of contracting new rail systems.
 - Increased cost of materials for project construction.
 - Initial start-up costs of new rail services.
 - Fuel cost.
- i. There has been insufficient opportunity for citizens and elected officials to fully explore the pros and cons of rail.**
- Citizen misunderstanding and political opposition.
 - Political forces affecting new transit system alignment (i.e., adversely affecting the creation of new routes in the most efficient and effective areas.)
 - Lack of understanding by the general public as to how new service would benefit them.
 - Knowledge of facts about costs, impacts, etc. related to all types of rail.
- j. The difficulties of the Central Florida/CSX deal have made others skeptical.**
- The debacle of the Central Florida/CSX rail deal.
- k. We need to find the right balance between the needs of freight and passenger rail on existing lines.**
- Competing traffic on existing rail lines - passenger and freight traffic.
- l. Public and private stakeholders have different needs and expectations.**
- Railroads are skeptical of re-regulation and need to protect their stockholders.
 - Railroads are risk adverse.
 - Many in the public sector do not see the reason to use tax dollars for a private for profit company.
 - Florida residents are still very much regionally focused at best and need to consider the benefits to the whole State.
 - Railroads typically cannot wait to have projects on a five year work program. Most projects need to be within 2 years. Public and political perception needs to be greatly improved.
 - Additional dedicated funding is needed.
 - We need to develop a good plan that will show how the "new" rail system will handle the future and compare that to the alternatives.

- m. County transit agencies lack the autonomy and dedicated funding they need.**
 - Lack of autonomy and dedicated funding for County transit agency operating and capital budgets.

- n. There is sometimes concern about the impacts of rail on local communities.**
 - Grade-level road/rail crossings contribute to additional traffic congestion.
 - Impact of rail crossings on highway capacity.
 - Local business loss of automobile traffic.
 - Noise.

- o. Florida's existing development patterns make rail use more challenging.**
 - Population and jobs in many parts of the state are spread out. Jacksonville is a prime example. The lack of density is a challenge to creating commuter rail.
 - Dispersed, low-density development patterns.

- p. The history of passenger rail use in Florida may inhibit public acceptance and use.**
 - History of passenger rail use in Florida may inhibit public acceptance and use.

RSAC PRE-MEETING SURVEY SUMMARY

Trends: *List below any additional key trends affecting the State and its stakeholders in addressing and meeting rail system needs now and in the future?*

Below, member responses to the pre-meeting survey have been compiled and grouped together under summary statements created by the facilitators to aid in review and discussion of the key trends identified by the members:

- a. The key trend is change.**
- b. Florida continues to grow (bringing additional consumption), but with more planning for increased density and related infrastructure.**
 - Continued urbanization and growth; planning for increased density and related infrastructure.
 - Appropriate land-use and growth management decisions
- c. The Florida economy is changing. There is a decline in manufacturing and production. Unemployment is rising.**
 - Decline in Florida's manufacturing and production capabilities.
 - Increasing population (consumption).
 - Current trends in job losses statewide.
- d. Climate change is driving increasing public concern with the environment.**
 - Green house gas and global warming concerns.
 - Climate change and need to reduce greenhouse gases results in need to increase mass transit opportunities.
- e. Highways will be increasingly congested and expensive.**
 - Urban highways are approaching build out.
 - Fuel costs are rising.
 - Roadways at maximum number of lanes and capacities.
 - Highways will be increasingly congested and expensive for freight movement.
 - Urban highways are approaching build out and passenger rail is an urgently needed component.
- f. As a result, there is increasing interest in and use of alternative modes of travel, and a desire to increase use of rail for passengers – both intercity and local (commuter, light rail, etc.).**
 - Desire to increase use of rail for passengers – both intercity and local (commuter, light rail, etc.).
 - Need for improved efficiency moving people and freight.
 - Public becoming open to new modes of cheaper transportation.
 - Fuel costs which benefit freight rail over trucking and encourage the public's use of passenger rail.
 - As oil goes up rail becomes a more advantageous method of transportation.
 - Need for improved efficiency moving people and freight.

- The key trends lie with the economy, fuel costs, and environmental concerns, all of which point toward the public benefits of investment in rail transportation.
- g. Use of rail is increasing for both freight and passengers, although there is a lack of balance in freight flows.**
- Increased use of alternative modes for travel.
 - Increased use of rail for freight.
 - Increased use of alternative modes for travel.
 - Lack of balanced freight flows.
 - Intermodal efficiencies.
- h. State is working with the railroads, while addressing political concerns, to improve the passenger and freight component of the system.**
- State is working with Railroads to improve the passenger and freight component of the system.
 - State has moved forward against difficult political pressure to do otherwise.
 - State needs to get continued and additional support in this endeavor from the railroads and the silent majority.
 - A good local, state and federal political strategy.
 - Operational issues.
 - Business practice issues.
- i. Early planning and public involvement has become an effective tool for all parties involved in transportation projects.**
- Early planning and public involvement has become an effective tool for all parties involved in transportation projects.
 - A good public involvement process.
- j. Increasing inclination towards relying on the private sector, or on public/private partnerships to solve problems.**
- Increasing inclination toward relying on the private sector to solve public problems for a profit.
 - Public-private partnerships provide opportunity for funding new rail lines to meet expanding demand for passenger rail.
 - Effective public/private partnerships.
- k. The public wants change due to higher fuel prices, concern for the environment, increasing highway congestion, and aggravation with the aviation system.**
- The key trend is change. The public wants change due to higher fuel prices, concern for the environment, worsening highway congestion, and aggravation with the aviation system.
- l. Public becoming open to new modes of cheaper transportation, although there is still a need for increased education and communication.**
- Education of the public.
 - Need for increased education and communication.

- An effective communications plan.

- m. Increasing fragmentation of transportation governance.**
 - Increasing fragmentation of transportation governance.

- n. Decreasing federal investment in transportation.**
 - Decreasing federal investment in transportation.
 - System investment issues

- o. There is increasing investment in deepwater ports and airports.**
 - Investment in deepwater ports and airports.

PART II. WHAT ADDITIONAL INFORMATION OR DATA WOULD BE MOST HELPFUL TO YOU AND THE OTHER MEMBERS IN DEVELOPING INFORMED AND EFFECTIVE STATEWIDE POLICY RECOMMENDATIONS FOR THE FLORIDA RAIL SYSTEM PLAN?

The following is a compilation of member responses to the pre-meeting survey question above. The responses appear as they were received and have not been reorganized or grouped together. Some of the information requested may be addressed during the organizational meeting. The list below will be utilized by staff to guide development of potential future presentations, while recognizing the limited amount of time the committee has to meet and whether or not the information is readily available.

What have other states done with respect to rail planning?

- California has an extensive in-state passenger rail operation. What can we learn from their experience?
- Compare rail funding practices in Florida to other states of similar size. For example, how much does New York and California support rail in general and passenger rail specifically. How do they fund rail. Do they lead or are there other agencies or government bodies that lead the development and funding efforts. The financial issues are essential to successful implementation of a good rail system for the state of Florida so providing as much financial and comparative national and even international information is paramount to making sound decisions.
- Presentations by key national rail leaders, especially passenger rail, should be invited to attend and speak about their challenges and success and how they may apply to Florida. In particular, leaders with transformative regional governance experience for rail/transit organizations should be invited to provide guidance on how to best organize rail/transit at the regional and state levels.

Review the current rail system in Florida

- Review the rail system nationally and in the Southeast United States (total miles, area covered, cost to purchase and maintain)
- Who owns the current system, where is it located, and what is the level of current usage?
 - For Freight Rail: Identify double track lines; identify volumes by rail line; and identify all major grade separated crossings. Discuss FDOT's schedule for grade separation/closure.
- Identify the ports with rail access. Also identify rail volume handled at the ports.
- Inventory of existing facilities, capital equipment and operating costs.
- What are the economics of expanded rail service?
- What is the status of current commuter rail initiatives in Florida?
- Data on the numbers of citizens that are riding rail services throughout the state.
- Data on the increases in ridership in the past year.
- Identification of corridors with transit potential.

Review the current Florida transportation system

- Location and extent of planned roadway improvements statewide.

Land use plans, patterns, and data in Florida

- Location of CERP project boundaries.
- Location of publicly owned and managed lands.
- Management plans for state-owned lands and aquatic preserves.
- Century Commission's CLIP maps and data layers.
- FWCC's Conservation Blueprint maps and data layers.
- Location of Florida Forever acquisition projects.

Existing rules, regulations, policies, and responsibilities

- Federal and state laws affecting rail operation and passenger and freight movement.
- What are the existing policies that promote urban rail transit and intercity passenger rail?
What are the gaps in those policies?
- What policies are needed to strengthen the connection between growth management and rail?
- Existing state policies (for funding and other issues), including but not limited to FDOT, that could be seen as constraining or otherwise inhibiting the development of a strong rail system for the state of Florida should be identified and presented to the Committee.
- What type of commitment the State is willing to provide in addressing the Florida Rail System Plan.

Rail Funding in Florida

- Short term capital and operating plans by railroads.
 - To assist the Florida Rail Stakeholder Advisory Committee members, the FDOT should provide information on current FDOT financial support for rail and in particular rail passenger transit.

Socio-economic and demographic trends

- Estimated population and employment growth by geographic areas.
- Current and projected freight demand by areas.

Transportation trends

- Congestion levels on SIS facilities.
- Statistical data on the reduction in use of roads, particularly as oil prices increase.
- Identification of corridors with transit potential.
- Current and projected freight flows by region.
- Growth in freight demand, combined with forecast growth in passenger movement, will contribute to increased congestion and reduced performance of the nation's transportation system. However, the impacts on each mode will be different. Information on how the impacts will be felt by each mode would be useful, as well as information on intermodal efficiencies.
- Port operations and capacities.

Benefits of investing in rail transportation

- Get the word out to the public about the potential of a "new and improved" rail system.
- Some of the benefits in investing in rail that should be discussed in the plan include: construction savings, environmental benefits, congestion mitigation, fuel conservation, reduced expenses.
- Publish findings from the rail plan in various media outlets.

Rail issues

- What issues have been in the last 10-15 years related to rail (in other words, what have been the problems, success, and failures)?

Rail visioning

- Develop a small set of presentations (each 15-20 minutes in length – 3 to 4) showing alternative models of rail systems as part of overall socio-economic system, not just the transportation system. Draw from history, from regions around the country or world, even from imagination. The goal of these presentations will be to invite additional dialogue about the role of rail in Florida's future.

General

- Raise awareness on the need to review all existing plans to help identify inconsistencies, opportunities, and to eliminate duplication
- Key contacts for rail transportation in Tallahassee