Advisory Boards

Minutes and Records
March 30, 2025
3/30/2025
March 30, 2025

1. Affordable Housing Advisory Committee

1.A. Affordable Housing Advisory Committee - March 18, 2025 *(2025-1073)*

ATTACHMENTS

1. March 18, 2025 AHAC Agenda Packet - FINAL
2. March 18, 2025 AHAC Public Notice
3. Sign-In Sheets _ AHAC - March 18, 2025

2. All Terrain Vehicle Park Ad Hoc Committee

2.A. All Terrain Vehicle Park Ad Hoc Committee - March 2025 - No Meeting *(2025-855)*

ATTACHMENTS
None

3. Animal Services Advisory Board

4. Bayshore Beautification MSTU Advisory Committee

5. Bayshore/Gateway Triangle Local Redevelopment Adv Board

6. Black Affairs Advisory Board

7. Board of Building Adjustments and Appeals

8. Coastal Advisory Committee

8.A. Coastal Advisory Committee - 3.13.2025 *(2025-1076)*

ATTACHMENTS

1. Public Notice - March 13, 2025 - CAC Meeting
2. Agenda - March 13, 2025 _ Collier County, FL
3. 02.13.2025 - SIGNED Minutes

9. CSRM Coastal Storm Risk Management Feasibility Study Advisory Committee

10. Code Enforcement Board

10.A Code Enforcement Advisory Board - March 29, 2025 *(2025-1083)*
.

ATTACHMENTS

1. March 27, 2025 Public Notice
2. March 27, 2025 CEB Agenda

11. Collier County Citizens Corps

12. Contractors Licensing Board

13. Comprehensive Watershed Improvement Program Committee

14. Development Services Advisory Committee

14.A Development Services Advisory Committee (DSAC) - March 05, 2025 *(2025-867)*
.

ATTACHMENTS

1. DSAC 03.05.2025 FINAL Agenda Packet
2. DSAC 03.05.2025 Public Notice
3. DSAC 02.05.2025 Signed Minutes

15. Emergency Medical Authority

16. Floodplain Management Planning Committee

17. Forest Lakes Roadway and Drainage MSTU Advisory Committee

17.A Forest Lakes Roadway and Drainage MSTU Advisory Committee - February 4, 2025 *(2025-972)*
.

ATTACHMENTS

1. TMS - Forest Lakes MSTU 02-04-25 Tuesday
2. Agenda & Backup - Forest Lakes 02-04-25
3. Signed Minutes - Forest Lakes 01-02-25

17.B Forest Lakes Roadway and Drainage MSTU Advisory Committee - March 4, 2025 *(2025-973)*
.

ATTACHMENTS

1. TMS - Forest Lakes MSTU 03-04-25 Tuesday
2. Agenda & Backup - Forest Lakes 03.04.25
3. Signed Minutes - Forest Lakes 02-04-25

18. Golden Gate Beautification MSTU Advisory Committee

18.A Golden Gate Beautification MSTU Advisory Committee - February 18, 2025 *(2025-976)*
.

ATTACHMENTS

1. TMS - Golden Gate MSTU 02-18-25 Tuesday
2. Agenda & Backup - Golden Gate 02-18-25

18.B Golden Gate MSTU Advisory Committee - March 18, 2025 *(2025-1103)*

.

ATTACHMENTS

1. TMS - Golden Gate MSTU 03-18-25 Tuesday
2. Agenda & Backup - Golden Gate 03-18-25
3. Signed Minutes - Golden Gate 01-21-25

19. Golden Gate Community Center Advisory Board

19.A Golden Gate Community Center Advisory Board - 03-03-2025 *(2025-856)*

.

ATTACHMENTS

1. Advisory Board Minutes=02-03-2025-Signed
2. Advisory Board Agenda=03-03-2025
3. 2-26-25 Golden Gate Community Center Advisory Board Meeting March 3, 2025

20. Golden Gate Estates Land Trust Committee

21. Golden Gate City Economic Development Zone Advisory Board

22. Haldeman Creek Dredging Maintenance MSTU Adv Committee

23. Historical/Archeological Preservation Board

24. Immokalee Beautification MSTU Advisory Committee

24.A Immokalee MSTU Advisory Board - March 19, 2025 *(2025-1108)*

.

ATTACHMENTS

1. MSTU Public Notice - 03.19.25
2. MSTU Agenda - 03.19.25
3. MSTU Minutes - 02.19.25

25. Immokalee Local Redevelopment Advisory Board

25.A Immokalee CRA Advisory Board - March 19, 2025 *(2025-1107)*

.

ATTACHMENTS

1. CRA Public Notice - 03.19.25
2. CRA Agenda - 03.19.25
3. CRA Minutes - 02.19.25

26. Infrastructure Surtax Citizen Oversight Committee (ad hoc)

27. Land Acquisition Advisory Committee

28. Lely Golf Estates Beautification MSTU Advisory Committee

28.A Lely Golf Estates Beautification MSTU Advisory Committee - February 20, 2025 *(2025-977)*
.

ATTACHMENTS

1. TMS - Lely MSTU 02-20-25 Thursday
2. Agenda & Backup - Lely 02-20-25
3. Signed Minutes - Lely 01-16-25

28.B Lely Golf Estates Beautification MSTU Advisory Committee - March 20, 2025 *(2025-1102)*
.

ATTACHMENTS

1. TMS - Lely MSTU 03-20-25 Thursday
2. Agenda & Backup - Lely 03-20-25
3. Signed Minutes - Lely 02-20-25

29. Library Advisory Board

29.A Library Advisory Board - March 19, 2025 *(2025-1153)*
.

ATTACHMENTS

1. Hybrid Remote LAB Meeting Notice_March 19, 2025
2. LAB - AGENDA - March 19, 2025
3. Approved February 19 2025 LAB Meeting Minutes

30. Ochopee Fire Control District Advisory Committee

31. Parks and Recreation Advisory Board

31.A Parks and Recreation Advisory Board - 03-19-2025 *(2025-1092)*
.

ATTACHMENTS

1. PARAB March 2025 Agenda
2. Collier County Parks & Recreation Advisory Board _ News Releases _ Collier County, FL
3. parab jan 2025 minutes signed
4. parab feb 2025 minutes signed

32. Pelican Bay Services Division Board

32.A Pelican Bay Services Division Board - Mar. 12, 2025 *(2025-1024)*
.

ATTACHMENTS

1. Pelican Bay Services Division Board Public Notice - Mar. 12, 2025
2. Pelican Bay Services Division Board Agenda Packet - Mar. 12, 2025
3. Pelican Bay Services Division Board Approved Minutes - Feb 12, 2025

33. Productivity Committee

34. Public Art Committee

35. Public Safety Coordinating Council

36. Public Transit Advisory Committee

36.A Public Transit Advisory Committee - August 21, 2024

. *(2025-1097)*

ATTACHMENTS

1. Press Release PTAC 8-21-24 Wednesday
2. Agenda & Backup PTAC 08-21-24
3. Signed Minutes - PTAC 06-19-24

36.B Public Transit Advisory Committee - September 18, 2024

. *(2025-1098)*

ATTACHMENTS

1. Press Release PTAC 9-18-24 Wednesday
2. Agenda & Backup PTAC 09-18-24
3. Signed Minutes - PTAC 08-21-24

36.C Public Transit Advisory Committee - November 20, 2024

. *(2025-1099)*

ATTACHMENTS

1. Press Release PTAC 11-20-24 Wednesday
2. Agenda & Backup - PTAC 11-20-24
3. Signed Minutes - PTAC 09-18-24

36.D Public Transit Advisory Committee - January 15, 2025

. *(2025-1100)*

ATTACHMENTS

1. Press Release PTAC 01-15-25 Wednesday
2. Agenda & Backup - PTAC 01-15-25
3. Signed Minutes - PTAC 11-20-24

36.E Public Transit Advisory Committee - March 19, 2025

. *(2025-1101)*

ATTACHMENTS

1. Press Release PTAC 03-19-25 Wednesday
2. Agenda & Backup - PTAC 03-19-25
3. Signed Minutes - PTAC 01-15-25

37. Radio Road Beautification Advisory Committee

38. Rock Road MSTU

39. Tourist Development Council

39.A Tourist Development Council - March 18, 2025 *(2025-1118)*
.

ATTACHMENTS

1. TDC Public Notice March 2025
2. March 18, 2025 Tourist Development Council Mtg Full Agenda
3. TDC Feb 18 2025 signed mtg mins

40. Vanderbilt Beach Beautification MSTU Advisory Committee

40.A Vanderbilt Beach Beautification MSTU Advisory Committee - February 6, 2025 *(2025-974)*
.

ATTACHMENTS

1. TMS - Vanderbilt Beach MSTU 02-06-25 Tuesday
2. Agenda & Backup - Vanderbilt Beach 02-06-25
3. Signed Minutes - Vanderbilt Beach 01-07-25

40.B Vanderbilt Beach Beautification MSTU Advisory Committee - March 6, 2025 *(2025-975)*
.

ATTACHMENTS

1. TMS - Vanderbilt Beach MSTU 03-06-25 Tuesday
2. Agenda & Backup - Vanderbilt Beach 03-06-25

41. Vanderbilt Waterways MSTU

42. Water and Wastewater Authority

Collier County
Affordable Housing Advisory Committee
(AHAC)

AGENDA

Growth Management Community Development Department
Collier County Museum Lecture Hall
3331 Tamiami Trail E, Naples, FL 34112

March 18, 2025, 9:00 AM

AHAC MEMBERS

Steve Hruby, Chair
Jennifer Faron, Vice Chair
Mary Waller, Member
Gary Hains, Member
Hannah Roberts, Member
Andrew Terhune, Member
Commissioner Dan Kowal, BCC Liaison
Arol Buntzman, Member
Todd Lyon, Member
Paul Shea, Member
Catherine Myers, Member
Bob Mulhere, Non-Voting Member

NOTE: ALL PERSONS WISHING TO SPEAK ON ANY AGENDA ITEM MUST REGISTER PRIOR TO SPEAKING. ALL REGISTERED SPEAKERS WILL RECEIVE UP TO THREE (3) MINUTES UNLESS THE TIME IS ADJUSTED BY THE CHAIRMAN. DURING COMMITTEE DISCUSSION, COMMITTEE MEMBERS MAY ASK DIRECT QUESTIONS TO INDIVIDUALS. PLEASE WAIT TO BE RECOGNIZED BY THE CHAIRMAN AND STATE YOUR NAME AND AFFILIATION FOR THE RECORD BEFORE COMMENTING.

IF YOU ARE A PERSON WITH A DISABILITY WHO NEEDS ACCOMMODATION IN ORDER TO PARTICIPATE IN THIS MEETING, YOU ARE ENTITLED, AT NO COST TO YOU, THE PROVISION OF CERTAIN ASSISTANCE. PLEASE CONTACT THE COLLIER COUNTY FACILITIES MANAGEMENT DEPARTMENT. ASSISTED LISTENING DEVICES FOR THE HEARING IMPAIRED ARE AVAILABLE IN THE COUNTY COMMISSIONER'S OFFICE.

1. **CALL TO ORDER & PLEDGE OF ALLEGIANCE**

2. **ROLL CALL OF COMMITTEE MEMBERS AND STAFF**

3. **APPROVAL OF AGENDA AND MINUTES**

   a. Approval of today's agenda
   b. Approval of November 19, 2024, meeting minutes
   c. Approval of January 10, 2025, Sub-Committee meeting minutes
   d. Approval of January 16, 2025, meeting minutes

4. **INFORMATIONAL ITEMS AND PRESENTATIONS**

   a. Housing Alliance Video (Michael Puchalla)
   b. 2050 Long Range Transportation Plan (Anne McLaughlin)

5. **PUBLIC COMMENT**

   a. Persons wishing to speak must register prior to speaking. All registered speakers will receive up to three (3) minutes unless the time is adjusted by the Chairman.

6. **DISCUSSION ITEMS**

   a. 2025-2027 LHAP review and recommendation of housing strategies (Lisa Carr/K. Sonntag)
   b. Infrastructure Surtax Funds (Cormac Giblin)
   c. Florida House Bill 923 and 943 (Jennifer Faron)
      https://www.flsenate.gov/Session/Bill/2025/923
      https://www.flsenate.gov/Session/Bill/2025/943

7. **STAFF AND COMMITTEE GENERAL COMMUNICATIONS**

   a. Update to Affordable Housing Map and map details (C. Giblin)

8. **NEW BUSINESS**

9. **ADJOURN**

10. **NEXT AHAC MEETING DATE AND LOCATION: May 20, 2024, at 9:00 AM Conference Room 609/610 - Growth Management Community Development Department**

MINUTES OF THE COLLIER COUNTY
AFFORDABLE HOUSING ADVISORY COMMITTEE

Naples, Florida, November 19, 2024

LET IT BE REMEMBERED, the Collier County Affordable Housing Advisory Committee, in and for the County of Collier, having conducted business herein, met on this date at 9 a.m. in REGULAR SESSION at the Collier County Growth Management Department Building, Conference Room #609/610, 2800 Horseshoe Drive North, Naples, Florida, with the following members present:

Chairman:	Stephen Hruby
Vice Chairman:	Jennifer Faron
	Gary Hains
	Commissioner Chris Hall
	Catherine Myers
	Andrew Terhune
	Mary Waller
	Hannah Roberts (excused)
	Todd Lyon
	Paul Shea, Planning Commissioner
	Arol Buntzman
	Robert Mulhere (excused)

County Staff Members Present:
Cormac Giblin, Director, Housing Policy & Economic Development, GMCD
Kristi Sonntag, Director, Community & Human Services, PSD
Derek Perry, Assistant County Attorney, County Attorney's Office
Sarah Harrington, Manager, Planning, Housing Policy & Economic Development, GMCD
Priscilla Doria, Ops Support Specialist II, Housing Policy & Economic Development, GMCD

1. **CALL TO ORDER & PLEDGE OF ALLEGIANCE**

   Chairman Hruby called the meeting to order at 9 a.m.

   [The pledge of allegiance was recited.]

2. **ROLL CALL OF COMMITTEE MEMBERS AND STAFF**

   Chairman Hruby called the roll call and a quorum of ten was present in the boardroom.

   Chairman Hruby recognized new member, Catherine Myers, and advised of upcoming end of term for Commissioner Chris Hall, who then made remarks. Decision on his replacement will be made December 10.

3. APPROVAL OF AGENDA AND MINUTES

a. Approval of today's agenda

Chairman Hruby made a motion to approve the agenda. The motion was seconded. The motion passed unanimously, 10-0.

b. Approval of July 16, 2024, AHAC meeting minutes

Chairman Hruby made a motion to approve the July 16, 2024, meeting minutes The motion was seconded. The motion passed unanimously, 10-0.

c. Approval of September 17, 2024, AHAC meeting minutes

Chairman Hruby made a motion to approve the September 17, 2024, meeting minutes. The motion was seconded. The motion passed unanimously, 10-0.

d. Approval of October 15, 2024, AHAC Sub-Committee minutes

- Amendments were requested.

Chairman Hruby made a motion to approve the October 15, 2024, AHAC Sub-Committee minutes, as amended. The amended motion was seconded. The motion passed unanimously, 10-0.

4. INFORMATIONAL ITEMS AND PRESENTATION

a) Update on Nuestra Senora de la Vivienda Community Foundation and Pulte Family Charitable Foundation (Andrew Van Valin)

Mr. Van Valin made his presentation via Zoom.

- Starting the PUD rezone process. Currently, in the SDP application process right now, responding to comments, working with the county to get through the permitting.
- Pulte Family Charitable Foundation is partnering with a nonprofit that was created to build and manage this project called Monarca.
- The community is on the northwest side of Immokalee – on Carson Road and West Clocks.
- Affordable Housing restriction with Collier County is 150 units at 60% and 20 units at 80%. Planning to build 179 single family home and townhomes mix of two-bedroom, three bedroom, and in a later phase building four bedroom
- Built in phases. The project has two parts: the physical aspect – the homes, neighborhood, streets and community center, and the wraparound services piece.

[Question and Answer portion followed the presentation between the AHAC and Mr. Van Valin]

5. PUBLIC COMMENT

a. Persons wishing to speak who have registered prior to speak

Public Speaker, Mark Teaters:

- Represents the East of 951 Horizon Study Committee, what is called the AD HOC Committee. Studying all of Eastern Collier County infrastructure.
- Preparing presentation to the Board of County Commissioners covering many topics. One interesting commonality is affordable housing. Employers unable to get employees because the employee cannot find affordable housing in Collier County.

(The AHAC invited the public speaker to attend the public AHAC meetings and possible partner with the AHAC)

6. DISCUSSION ITEMS

Request from AHAC member to move to the parking requirements and the subcommittee results.

C. Parking Requirements

- The parking requirements is a draft executive summary prepared to go to the Board on their December 10 meeting. This subject came up in Commissioner correspondence with a majority of the Commissioners directing staff to come back with an item to discuss multifamily parking in Collier County. Concern from a few Commissioners that they had heard from constituents that parking was not adequate enough.
- In addition, staff researched parking requirements for other communities around the State. There is a sampling of 12 other communities. Collier County had the third least restrictive parking requirements. Parking comes up a lot. Spoken with several affordable housing developers. A goal is to provide a parking ratio of 1.5 spaces, at least 1.5 spaces per unit. On average, around 1.6 to 1.8 spaces per unit is provided.
- A multi-family rental, affordable development, is not the same as an owner-occupied condominium. In addition, the apartment side is much greater at site management and enforcement of parking and making sure that their parking lots are not overrun.
- In addition, as affordable housing advocates, affordable housing advocates are also guided by certain sections of state law—this statue that creates the AHAC.
- In a separate State Statute, the Live Local Statute, there are quite lengthy requirements about parking.
- A couple of State Statutes that point us in a different direction than perhaps the Board of County Commissioners is looking to discuss on the 10th in terms of affordable housing.

Discussion followed between the AHAC and staff. Discussed the land development code's flexibility via a process called the administration parking reduction, available to any type of development. Industries' expressed concern that process may no longer be available to them.

Direction of the Commission was looking to make parking reductions a public process rather than an administrative process.

Chairman Hruby: All we can do is advise. We want to supplement that with several concerns that we have based on our obligation to report back to the state on our incentives about parking.
I think we should make a recommendation to the BCC.

There should be some flexibility on a case-by-case basis.

It should be remained administrative.

And the most important is to consider the difference between the parking needs of a market rate versus an affordable workforce housing multifamily development.

Chairman Hruby: made a motion to adopt that recommendation. motion seconded. Motion passed.

A. 2025 calendar year of work plan review item

The dates of the following years meetings were presented along with assigning subjects or policy matters to each of those meetings.

B. Collier County Housing Website Analytics

The website analytics from CollierCountyHousing.com were provided to the AHAC. The analytics provide the number of visitors each month, number of page views, how they got there. The website and website analytics are part of the County's marketing contract.

D. Sub-Committee recommendation on Affordable Housing Rental Unit Tennant Grace Period Policy

The sub-committee met on October 15th and this is the policy that was deemed most appropriate to bring back to the full AHAC for consideration.

Discussion followed between the AHAC.

A subcommittee meeting will be scheduled for further discuss then brought back to AHAC.

E. Final 2024 SHIP Incentive Strategies Report

This is the final document that was approved by the Board of County Commissioners on November 12th, seeking a recommendation of approval to submit to the state.

Mary Waller made a motion to submit our incentive report to the State of Florida. Jennifer Faron seconded the motion. Motion passed unanimously.

7. STAFF AND COMMITTEE GENERAL CONMMUNICATIONS

Cormac Giblin: On the December 10th Board meeting is the Fiddler's Creek rezone. Fiddler's Creek is looking to add 750 rental apartments, which would include 225 affordable units with half of them at 80% of median, half of them at a 100% of median.

Arol Buntzman: The construction of the second building of 16 apartments is underway. On Friday the slab for the first floor was poured. Received a grant from the Schoen Foundation for a million dollars, which caps off the money needed to fully fund the third building and will go out to contract on that within the next week. Received a commitment for another million dollars from the Schoen Foundation for the community center. The first children's playground has been completed and fenced; it was finished early.

Kristi Sonntag: Remind the AHAC that in March AHAC will have the local housing assistance plan to review. This is due by May 2nd. The first hurdle will be to review that document and provide recommendations, then it will go to the City of Naples, then it will go to the Board of County Commissioners and ultimately to the state by February.

8. NEW BUSINESS

None

9. ADJOURN

10. NEXT MEETING DATE

January 21, 2025, 9:00 a.m.
Conference Room 609/610 Growth Management Community Development

There being no further business for the good of The County, the Affordable Housing Advisory Committee meeting was adjourned at 11:15 a.m.

Collier County
Affordable Housing Advisory Committee

_____
Steve Hruby, Chairman

These minutes approved by the Committee/ Chairman on _____ (date)
As presented _____ or as amended _____.

MEETING MINUTES OF THE AFFORDABLE HOUSING ADVISORY COMMITTEE SUBCOMMITTEE MEETING

Naples, Florida, January 10, 2025

LET IT BE REMEMBERED, the Affordable Housing Advisory Committee Subcommittee in and for the County of Collier, having conducted business herein, met on this date at 9:00A.M. in REGULAR SESSION at the Growth Management Department Building, 2800 North Horseshoe Drive, Naples Florida with the following members present:

Chairwoman: Mary Waller
Hannah Roberts
Paul Shea
Catherine M. Myers
Jennifer Faron

ALSO PRESENT:
Cormac Giblin, Director, Housing Policy & Economic Development
Sarah Harrington, Manager, Housing Policy & Economic Development Manager-Planning
Priscilla Doria, Ops Support Specialist II, Housing Policy & Economic Development
Lisa Weinmann, Manager-Grants, Community & Human Services Division

1. **CALL TO ORDER & PLEDGE OFALLEGIANCE**
   The meeting was called to order at 9:00am and the Pledge of Allegiance was recited.

2. **ROLL CALL OF SUBCOMMITTEE MEMBERS AND STAFF**
   Roll call was taken, and a quorum was established.
   Commissioner Kowal was also present for a portion of the meeting.

3. **APPROVAL OF AGENDA AND MINUTES**
   a. **Approval of Today's Agenda**
      Ms. Faron moved to approve the agenda. Second by Mr. Shea. Carried unanimously 5 – 0.

4. **INFORMATIONAL ITEMS AND PRESENTATION**
   None

5. **PUBLIC COMMENT**
   Persons wishing to speak must register prior to speaking. All registered speakers will receive up to three (3) minutes unless the time is adjusted by the Chairman.

   None

6. DISCUSSION ITEMS

a. Tenant Pay Increase

The Subcommittee reviewed the proposal "*AHAC Subcommittee Recommendation 10/15/24 Affordable Housing Rental Unit Tennant Grace Period Policy"* submitted by representatives of the development industry regarding tenant income increases and losses in qualifications for reduced rent.

The following was noted during discussion:

- The purpose of the meeting is to develop a recommendation on the proposed policy for consideration by the full Committee.
- The issue has been raised to deal with cases where the tenant's income no longer qualifies for reduced rent, so the landlord has the option not to immediately displace the tenant if they so desire.
- The goal of the program is to provide the housing as a temporary measure with the hope the tenant reaches the market income level and leaves the program. It would be beneficial to ensure there are as few deterrents as possible for a tenant's employment decision which may result in their change of status in the program.

The Subcommittee reviewed the proposed language with the following noted:

- The overall concept is to provide the developer/landlord with options, however there is a benefit to ensuring tenant stability by allowing some type of grace period if their income increases.
- The grace period should ensure the timeline includes a school year cycle, so children don't have to change facilities midyear.
- The annual compliance monitoring could be the base point with a grace period of 6 to 12 months before the tenant is required to relocate.
- One option for the developer is to swap the tenant's affordable unit designation to market rate and convert an existing market rate unit to the affordable category so the tenant may remain in the unit.
- If a unit swap is allowed, assurance needs to be made the overall ratio of affordable and market units remains in conformance with the approval governing the development.
- Any policy recommended should include developments where 100 percent of the units are "affordable.".
- Absent of a policy, there is no grace period, and the developer needs to seek removal of the tenant when it's determined they no longer meet the income criteria.
- Although there is no direct protection offered the tenant (which is not the responsibility of the County), the policy provides an option for developers or landlords. Generally, those renting properties to quality tenants are not anxious to remove the lessees due to the logistics, potential competition for acceptable tenants and the costs associated with releasing a unit.
- The language exempting certain changing in income circumstances from the policy including a change in employment, change in marital status and other source income should be stricken as it is not necessary to determine the rationale for the individuals pay increase.

Staff and the Subcommittee reviewed the proposed policy on the visualizer and revised the language real time.

Following the discussion, the Subcommittee unanimously recommended the main Committee approve the following language:

If at time of the annual compliance monitoring, a developer/ landlord is found to have a tenant no longer meeting the income requirements, the developer/ landlord has the option of allowing the tenant to remain in the unit for up to and not to exceed a 12-month grace period from the date of the annual monitoring. When a tenant exceeds the income requirements, the developer/ landlord has the option to utilize a floating unit within the development to substitute the unit occupied by the tenant that is no longer income qualifying for an alternative unit within the development that is income qualifying. In all cases, the developer/ landlord shall still be responsible for maintaining the agreed to mix of total number of units per %AMI income categories as approved by the governing documents. Tenant Household Income will be calculated in accordance with LDC Section 2.06.05.B.4. (using most recent filed tax return).

Scenario:

1. *A household is initially income qualified to lease an affordable unit.*
2. *At some point the tenant's income increases pushes them over the income limit.*
3. *Tenant's new income is reported on their yearly tax return.*
4. *During the yearly monitoring the tenant is found to be over income.*
5. *Tenant is put on notice that their household income will be recalculated at the next yearly monitoring, and if still over income, the developer must replace them with an income qualifying household; alternatively, the developer could certify the occupant of an alternate unit.*

Existing AHDB LDC Section on How Income is Calculated:
2.06.05.B.4. Income verification. The County Manager or designee or the developer shall obtain written verification from the potential occupant (including the entire household) to verify all regular sources of income to the potential tenant/owner (including the entire household). The written verification form shall include, at a minimum, the purpose of the verification, a statement to release information, employer verification of gross annual income or rate of pay, number of hours worked, frequency of pay, bonuses, tips and commissions and a signature block with the date of application. The verification shall be valid for up to 90 days prior to occupancy. Upon expiration of the 90-day period, the information may be verbally updated from the original sources for an additional 30 days, provided it has been documented by the person preparing the original verification. After this time, a new verification form must be completed. The income verification may take the form of the most recent year's filed income tax return for each occupant who had filed and will occupy the affordable housing unit.

7. STAFF AND COMMITTEE GENERAL COMMUNICATIONS
None

8. NEW BUSINESS
None

9. ADJOURN
NEXT AHAC MEETING DATE AND LOCATION: January 16th, 2025, at 9:00 AM Conference Room 609/610 - Growth Management Community Development Department.

There being no further business for the good of the County, the meeting was adjourned by order of the chair at 10:31AM.

Collier County

Affordable Housing Advisory Committee, Subcommittee

_____

_____
Printed Name

The January 10, 2025, Affordable Housing Advisory Sub-Committee minutes are approved by the Committee/Chairman on _____ as presented_____ or as amended _____.

MINUTES OF THE COLLIER COUNTY AFFORDABLE HOUSING ADVISORY COMMITTEE

Naples, Florida, January 16, 2025

LET IT BE REMEMBERED, the Collier County Affordable Housing Advisory Committee, in and for the County of Collier, having conducted business herein, met on this date at 9 p.m. in REGULAR SESSION at the Collier County Growth Management Department Building, Conference Room #609/610, 2800 Horseshoe Drive North, Naples, Florida, with the following members present:

Chairman: Stephen Hruby
Jennifer Faron
Arol Buntzman
Gary Hains
Dan Kowal, BCC
Todd Lyon
Paul Shea (excused)
Mary Waller
Andrew. Terhune
Catherine Myers
Bob Mulhere
Hannah Roberts

County Staff Members Present:
Cormac Giblin, Director, Housing Policy & Economic Development
Sarah Harrington, Manager, Housing Policy & Economic Development
Priscilla Doria, Ops Support Specialist II, Housing Policy & Economic Development
Kristi Sonntag, Director, Community & Human Services Division
Tracey Smith, Grants Coordinator II, Community & Human Services Division
Lisa Carr, Supervisor-Grants, Community & Human Services Division

Any persons in need of a verbatim record of the meeting may request a copy of the audio recording from the Collier County Growth Management Department.

1. CALL TO ORDER & PLEDGE OF ALLEGIANCE

Chairman Hruby called the meeting to order at 9:02 p.m.
[The pledge of allegiance was recited.]

2. ROLL CALL OF COMMITTEE MEMBERS AND STAFF

- Welcome Commissioner Kowal as the newly elected representative of the BCC

- Cormac Gibin called the roll call and noted that Paul Shea has an excused absence as he is a member of the Collier County Planning Commission, and they have meeting going on at the same time. (Hannah Roberts was not present during roll call but entered the meeting at 9:35 a.m.)

  [A quorum was established]

- Nominations are open for Chair and Vice-Chairman discussion commenced.
- Vice Chair Jennifer Faron thanked staff, enjoyed the experience, made a lot of contributions with a unique perspective. Grateful for the opportunity.

Arol Buntzman moved to nominate Steve Hruby and Jennifer Faron to continue in their respective roles, seconded by Mary Waller. Motion passed unanimously

3. APROVAL OF AGENDA AND MINUTES

- Mary Waller requested an update on ADU's.
- Cormac Giblin agreed to give that update during staff communications at the end.
- Chairman Hruby noted that on February 3rd and 4th he'll be in Tallahassee at Legislative Day for American Institute of Architects and ADU's will be on their agenda to take to the legislators for an update.
- Chairman Hruby wants to add under New Business the discussion on proposed amendment to the building code, as its significant for affordable housing.

Jennifer Faron made a motion to approve the agenda, as amended. The motion passed unanimously.

- Cormac Giblin noted that they are still waiting on the minutes from the November meeting and sub- committee minutes held last week. Minutes are coordinated by the Clerk of Courts office which are assigned to a sub-contractor for completion of those minutes.
- Cormac Giblin noted that staff would work on getting the minutes back as soon as possible.

4. INFORMATIONAL ITEMS AND PRESENTATIONS

a. PowerPoint Presentation, Speaker - Scarlett Perez, McDowell Housing Project Developers overview of current projects.

- McDowell Housing Partners is an affordable housing and attainable housing developer, primarily focus on Low Income Housing Tax Credits (LIHTC) across the state.
- Located and headquartered in Miami-Dade County and is a vertically integrated company with construction managers, developers, and accounting.
- Ken Bowan, new director of acquisitions will assist in looking for new

developments and sites.

- Two completed projects, Ekos on Santa Barbara and Ekos Allegro (to be changed to Ekos Cadenza II)
- Currently has a 1600-person waitlist
- Ekos Creekside (formally Ekos on Collier) funded through Surtax funding and Collier County's first live local development. Projected to close in April of this year.
- Some of the biggest challenges is parking and open space requirements.
- Final development in the pipeline is Ekos on Santa Barbara Phase II (directly across Santa Barbara Phase I), going through PUD amendment process. Currently funded for 84 units. Projected financial closing early next year.
- Future growth plans in Collier County are to search for vacant land that would integrate with the fabric of that community. We are very selective and precise on what we are doing and partnerships.
- 30-80% AMI are primary target group.

[Further discussion between Committee and McDowell continued topics related to of live local, parking restrictions, density bonus, LIHTC operational and financial management]

Andrew Terhune noted that extra amenities such as pickleball courts, dog park, offices, fitness center, pool etc., add to the cost of development projects.

[Support of amenities is a well-researched national best practice and support by other Committee members was expressed]

b. PowerPoint Presentation, Speaker - Matthew Smith, B2R2O Build-to-Rent-to-Own Creating transition into home ownership

- B2R2O is a non-Profit initiative to develop homeownership opportunities for members of Collier County Community workforce, broadly defined as those making between 60% to 120% of the Area Median Income, with an emphasis on essential service personnel.
- A mission to offer stable, secure, financial pathway to homeownership to retain, attract, and increase the tenure of a high-quality community workforce.
- Partnership between B2R2O and the Collier County Land Trust ("CCCLT") to identify sites that are suitable for single family or townhome development product on underdeveloped land sites, that are appropriately priced and with employer proximity in mind.
- Recoverable Grants & Program related investments available exclusively to non-profits such as zero or low interest loan like investments

- Rent to Own Agreement would require a 3-year rental period, mandatory educational program, rent charged to 30% of gross income, percentage of rent charged goes towards funding reserve account for Beneficiary's downpayment
- After 3-year rental period, purchase of the unit will be assisted by B2R2O by means of traditional mortgages through partner banks and financial institutions.

5. PUBLIC COMMENT

[See item 6.C for public speaker comments]

6. DISCUSSION ITEMS

a. CHS Grant application cycle:

- Tracey Smith, Collier County Grant Coordinator, asking for volunteers to serve on the review committee. *Mary Waller accepted*.
- Cormac asked for a snapshot of funding streams that will be reviewed, dollar amount to be awarded, and timeframe of when that award will be made.
- Tracey Smith:
    - Program Year 2025, for CDBG, ESG, HOME, HOME-ARP, SHIP
    - Approx. Funding amounts:
        - CDBG - $2,000,000
        - ESG- $195,000
        - HOME- $800,000
        - HOME-ARP - $2,300,000
        - SHIP- $3,000,000
- Timeline: 6-7 months process

Mary Waller questioned why the Local Housing Trust Fund is not part of the grant cycle.

Kristi Sonntag responded that it would be part of a separate funding cycle.
Mary Waller…*how much do we have in there?*

Kristi Sonntag noted that approx. million dollars, give or take, and that it earns interest.

Kristi Sonntag further noted that the Local Housing Trust Fund is under the County Manager's and use of those funds is at the discretion of the County Manager's office and is separate from the Affordable Housing Trust Fund, which is under the Community & Human Services Division

b. January 2025 Apartment Survey:

Presented by Lisa Carr, Grant Supervisor, Community & Human Services

- Summary of availability and rates
- Survey divided by income levels (very-low, low, and moderate)

c. Tenant Income Grace Period

Cormac Giblin gave a background as to how and why a policy to address tenant income increases came about and presented two policy recommendations, one drafted by the sub-committee and another drafted by staff.

Committee agrees to proceed with the revised staff policy recommendation with the removal of language as to specific reason for income change and requests language be added in to ensure that at all times within the grace period, the mix of affordable units must remain the same as provided for in the governing document.

[Public Speaker Comment]

Public Speaker – Michael Puchalla, CEO of The Housing Alliance, Inc., Executive Director of the Community Land Trust and HELP, a HUD approved counseling agency.

There's is an opportunity to work with the housing navigator program through HELP to provide some benefits to the tenants…a potential opportunity to collaborate as we are already assisting some of the income restricted units and engaging those individuals and looking at their incomes and making sure they're qualified…we have funding to provide that level of service to individuals and to provide staff assistance with collection of income data and provide transition assistance to a tenant to another housing unit if they no longer qualify to make it an easier transition for those tenants.

Mary Waller made a motion to accept the revised staff policy recommendation with the additions/deletions and to be brought forward to the BCC for approval, seconded by Hannah Roberts - Motion passed 11-1 with Andrew Terhune opposing.

7. STAFF AND COMMITTEE GENERAL COMMUNICATIONS

a. ADU discussion:
Cormac Giblin-
The LDC amendment was headed to the Planning Commission meeting Agenda today. The Board directed that a pilot program be established for the urban Golden Gate Estates that would allow the rental of guest houses or accessory dwelling units. There is no affordability component to it. The next stop is to bring that to the Board of County Commissioners to adopt that LDC amendment.

b. 2024 Annual Snapshot of Affordable Housing Units approved by the BCC:
- 9 rezones approved
- 66% of every development addressed housing affordability
- 31% of entire units are affordable
- 614 new affordable units added

c. Upcoming Meeting & Hearings:
- BCC approved Fiddlers Creek PUD, 750 rental units with 225 are affordable.

- Tamiami Trail Greenway Rd MPUD, 300 rental units with 90 being affordable to before the Board at their next meeting
- February 20th Planning Committee, Tamiami Trail 58-acre PUD, 400 rental units or owner-occupied with a level of affordability included and NC Square MPUD, 249 rentals with 30% affordable.
- March 6th the Community Housing Plan final initiatives are being heard by the Board at a nighttime hearing.

8. NEW BUSINESS

a. Proposed amendment to the Florida Building Code and International code

Chairman Hruby-

- Takes Triplex and Quadplex residential developments and moves them from the commercial building code into the residential building code.
- Supports changes to both
- Very good chance that would be in the 2026 update of the Florida Building Code.
- Proposed discussion on zoning related to the proposed changes.

9. ADJOURN

There being no further business for the good of the County, the meeting was adjourned by the order of the chairman at 11:28a.m.

10. NEXT AHAC MEETING DATE AND LOCATION

Next meeting will be on March 18th will be in another location to be announced.
The conference room will be under technical equipment renovation.

COLLIER COUNTY AFFORDABLE HOUSING ADVISORY COMMITTEE

_____

Steve Hruby, Chairman

These minutes were approved by the committee on _____, as presented _____, or as amended _____.



2050 Long Range Transportation Plan

Collier County Affordable Housing Advisory Committee, 3/18/25

Jacobs

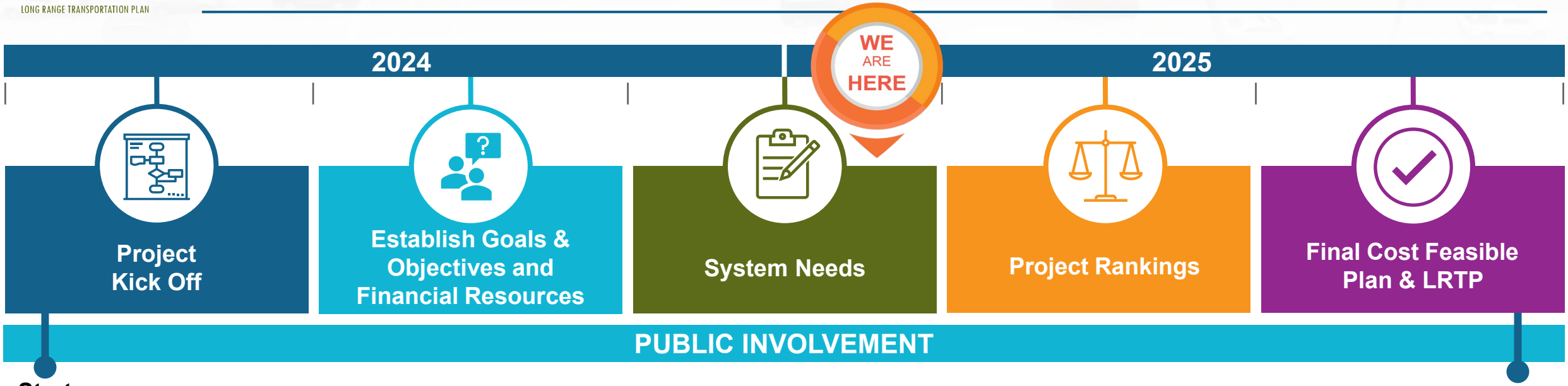
COLLIER Metropolitan Planning Organization

Agenda



- LRTP Schedule Update
- 2050 Socioeconomic Data and Growth
- 2050 Roadway Needs

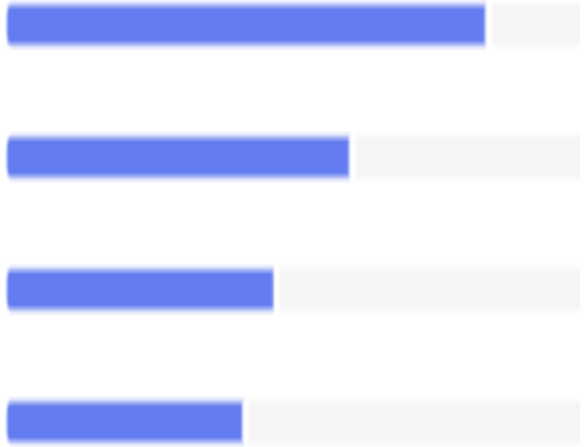
LRTP Schedule & Process



Visioning and Needs Survey

- *Please rank the following transportation considerations from <u>most important to least important</u>.*

1	Safety - focus on reducing traffic fatalities and serious injuries
2	Improve reliability of the transportation system and mitigate stormwater impacts
3	Improve accessibility by enhancing affordable transportation in underserved communities
4	Emerging Mobility - embrace the innovation of new mobility options such as automated/connected transport, electric vehicles, ridesharing, micromobility, and flying cars.

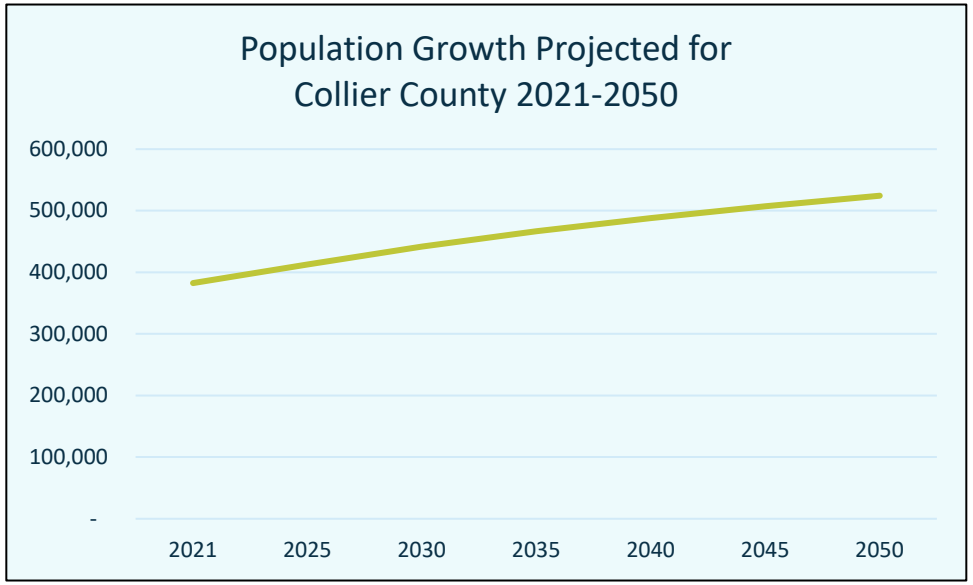


Public & Stakeholder Outreach

Tribes	• Miccosukee Tribe – 10/16/24 • Seminole Tribe – 10/17/24
Community Redevelopment Agencies (CRA)	• Immokalee CRA/MSTU – 12/11/24 • Bayshore/Gateway Triangle CRA – 1/9/25
Cities	• Everglades City – 2/4/25 • City of Marco Island – 2/18/25 • City of Naples (TBD)
Pop-Up Events	• Golden Gate Community Market – 2/22/25 • Immokalee Cattle Drive & Jamboree – 3/8/25 (upcoming)

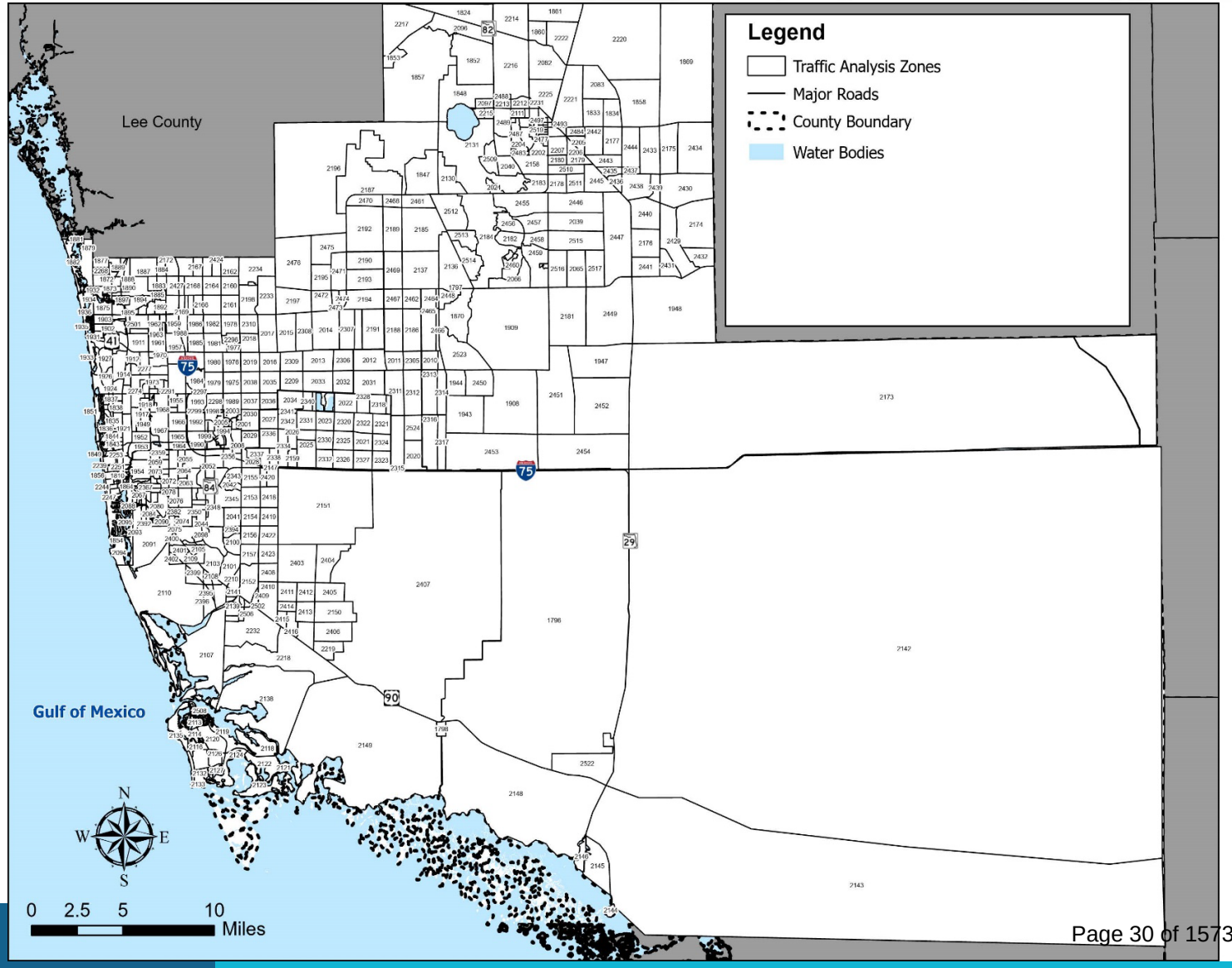
2050 Socioeconomic (SE) Data & Growth

- Socioeconomic data includes population, employment, school enrollment, dwelling units, etc.
- 2019 base year data developed by FDOT
- 2050 forecast year data based on
  - University of Florida's Bureau of Economic and Business Research (BEBR) - Medium Population projections
  - County Interactive Growth Model (CIGM) – estimates future growth in County
  - FDOT adjustments for modeling purposes
  - In round numbers, projected population of 524,00 by 2050, an increase of 111,000 over 25 years



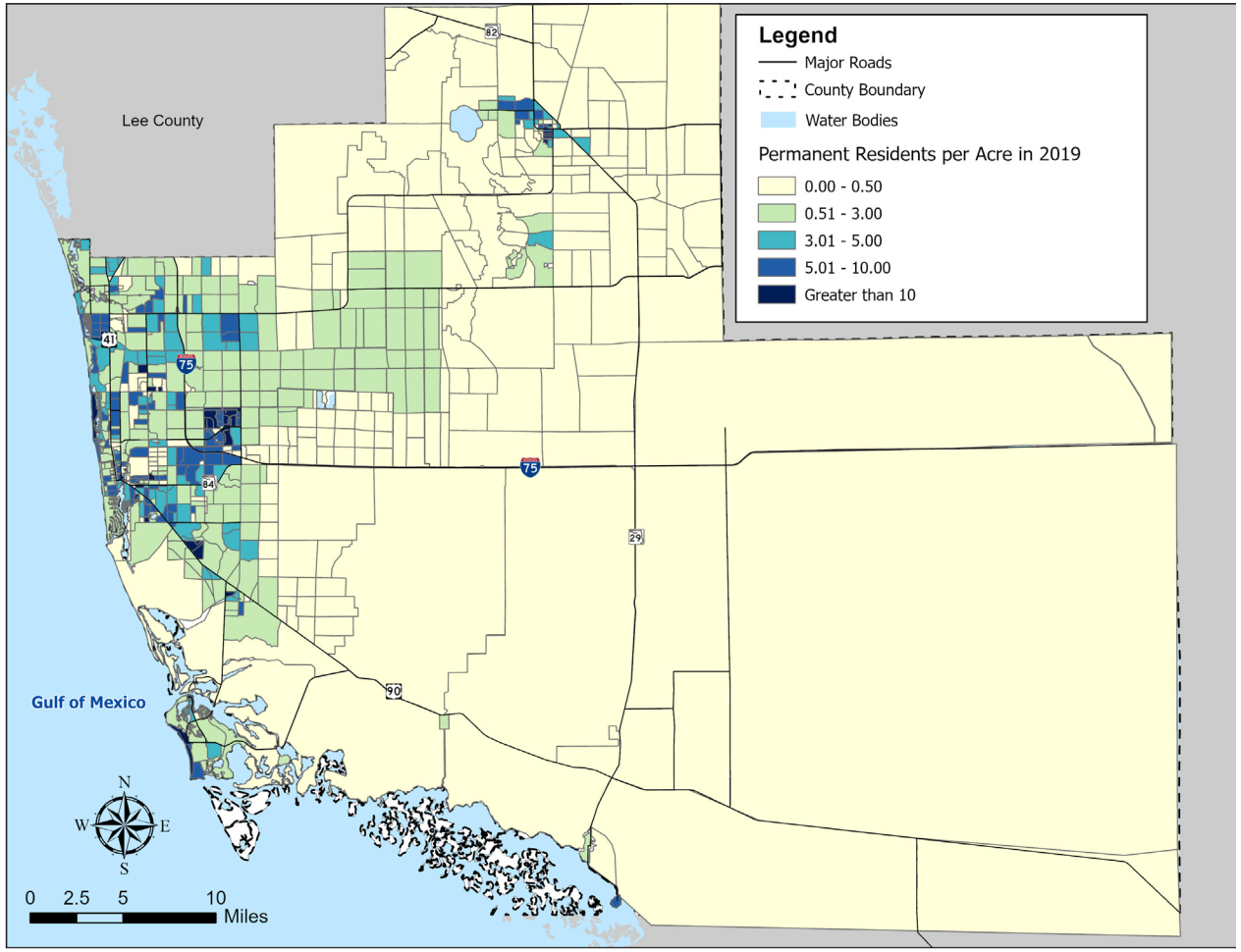
Traffic Analysis Zones (TAZ)

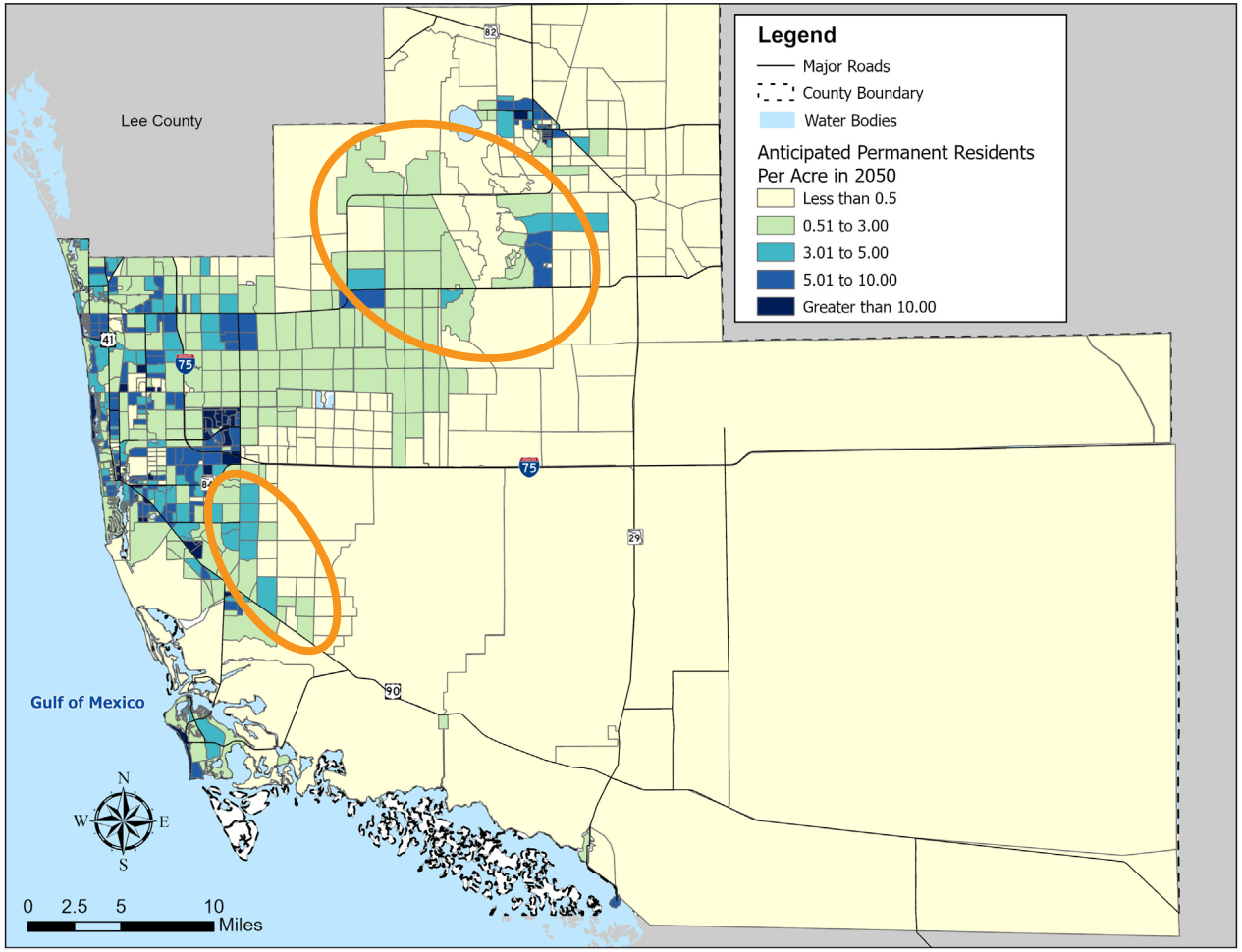
- A TAZ is a small geographic unit used in travel models to create trip generation rates for all land uses within the TAZ
- The 2050 LRTP includes **729 TAZs**



Estimated Growth in Collier County

- Estimated permanent residents per acre by TAZ **(2019)**
- Projected permanent residents per acre by TAZ **(2050)**

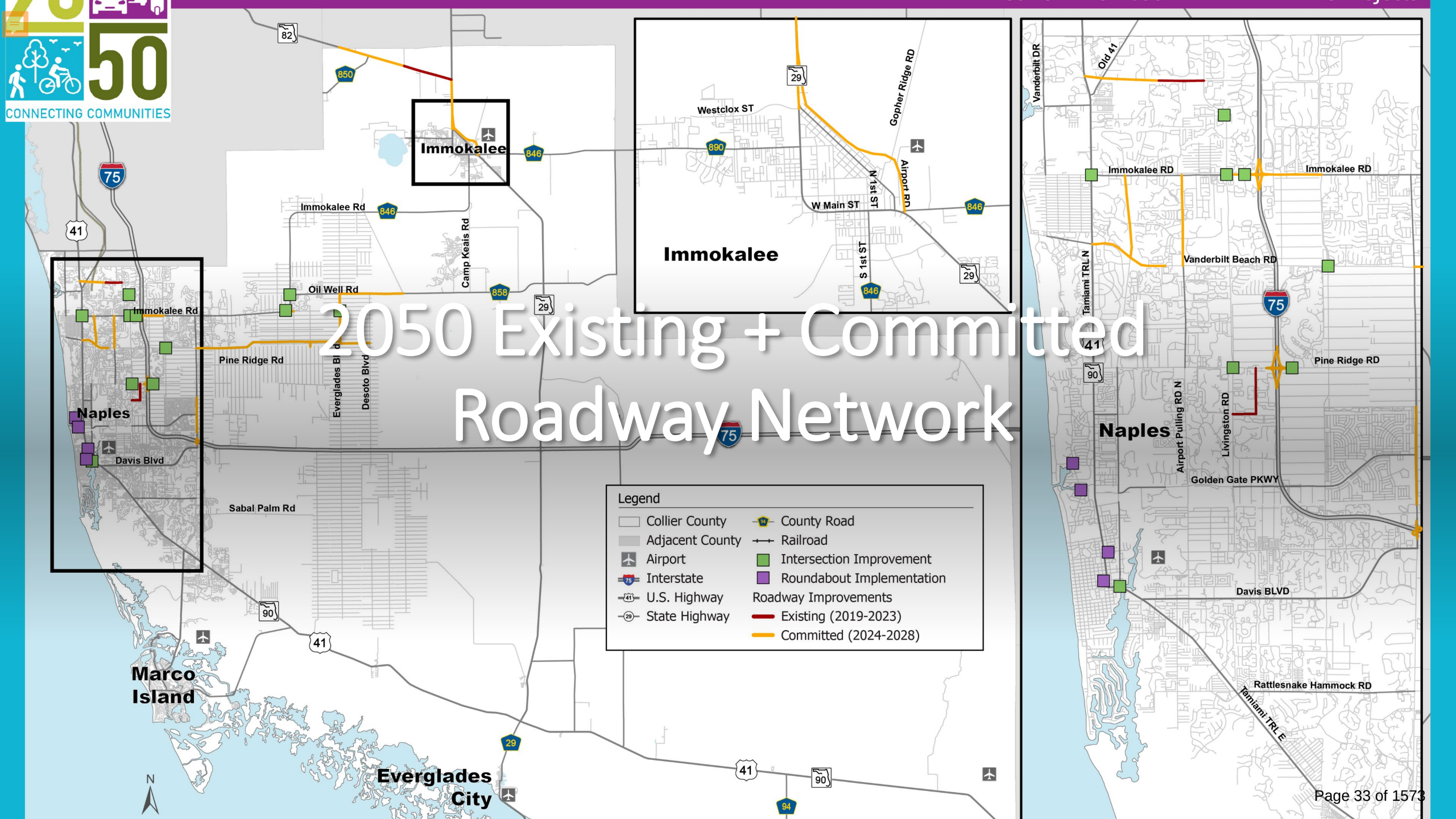




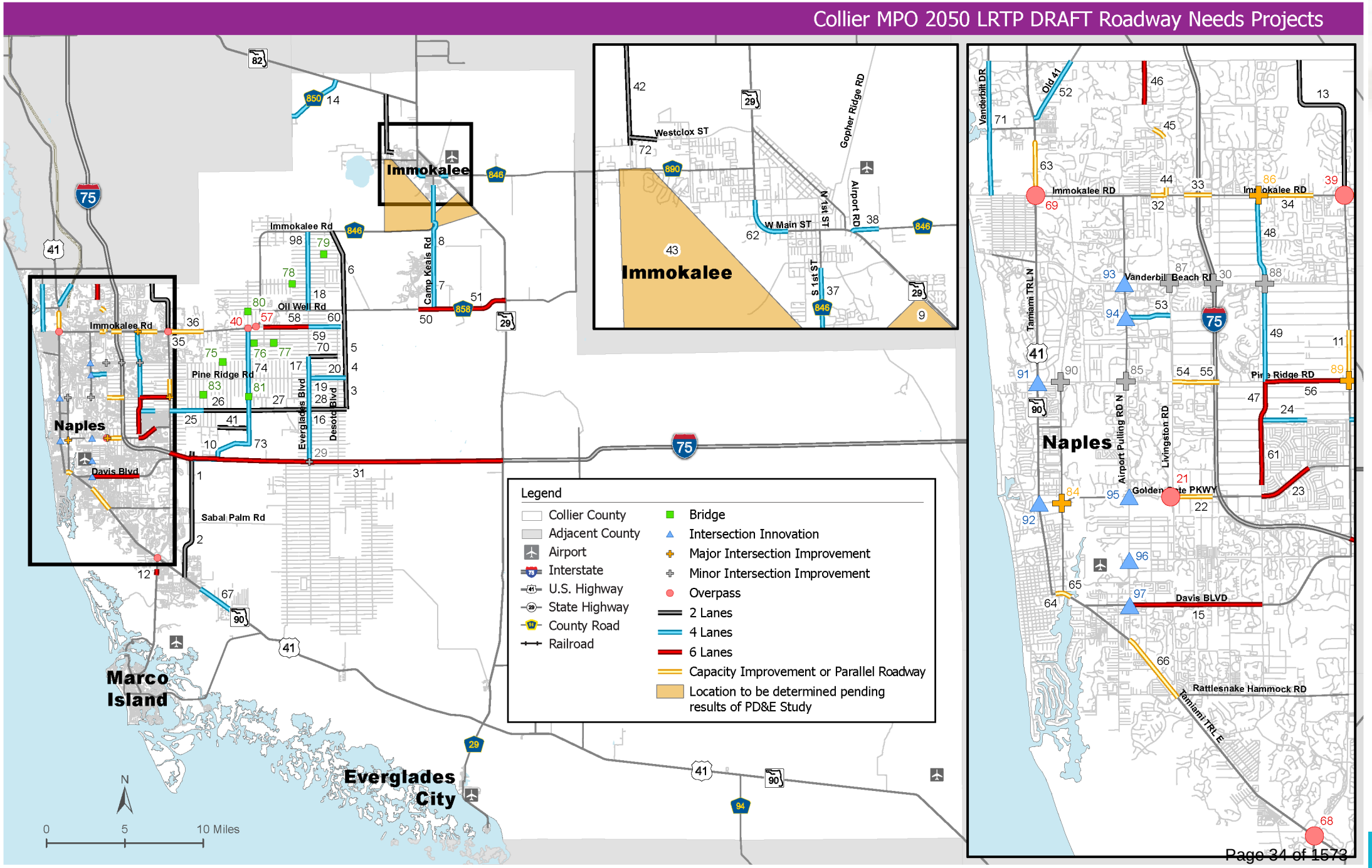
Estimated Growth in Collier County

Socioeconomic Data	2019 SE Data[1]	2050 SE Data[1]	Percent Change
Single-Family Dwelling Units	110,686	158,118	42.9%
Population in Single-Family Units	213,687	312,310	46.2%
Multi-Family Dwelling Units	115,409	140,412	21.7%
Population in Multi-Family Units	163,959	211,777	29.2%
Residential Population (in SF + MF units)	377,646	524,073	38.8%
Hotel/Motel Rooms	7,877	10,445	32.6%
Students in School (including colleges)	57,864	108,707	87.9%
Total Employees	149,122	177,773	19.2%

[1]Socioeconomic data provided by the FDOT D1RPM Development Landing Page as of February 3, 2025 (https://trafodata.maps.arcgis.com/apps/instant/portfolio/index.html?appid=6a0e5aa3b7404f92886da6c3c8242cdb)


2050 Existing + Committed
Roadway Network
Immokalee
Immokalee
Naples
Marco Island
Everglades City
Legend
Collier County
Adjacent County
Airport
Interstate
U.S. Highway
State Highway
County Road
Railroad
Intersection Improvement
Roundabout Implementation
Roadway Improvements
Existing (2019-2023)
Committed (2024-2028)
Immokalee Rd
Pine Ridge Rd
Oil Well Rd
Camp Keais Rd
Everglades Blvd
Desoto Blvd
Sabal Palm Rd
Davis Blvd
Westclox ST
W Main ST
N 1st ST
S 1st ST
Gopher Ridge RD
Airport RD
Vanderbilt DR
Old 41
Immokalee RD
Vanderbilt Beach RD
Tamiami TRL N
Airport Pulling RD N
Livingston RD
Golden Gate PKWY
Davis BLVD
Rattlesnake Hammock RD
Tamiami TRL E
N

2050 Roadway Needs



Activities – Next Quarter



- Continuing stakeholder and public outreach
- Incorporate Needs identified in modal plans: Bike-Ped Master Plan, Transit Development Plan, Joint Lee/Collier MPO Congestion Management Plan; and Safety Action Plan
- Finalize Needs Plan
- Develop travel model alternatives to help inform Cost Feasible projects
- Develop Cost Feasible Plan



Thank you!

Anne McLaughlin, Executive Director, 239-252-5884,
anne.mclaughlin@colliercountyfl.gov

Collier County
Public Services Department
Community & Human Services Division

State Housing Initiatives Partnership (SHIP)

Collier County and the City of Naples Local Housing Assistance Plan (LHAP) 2025-2028

State Housing Initiatives Partnership (SHIP) - Basics

- Before a City or County can receive SHIP funds, its staff must take specific actions as outlined in the SHIP rule and statute - 420.907, Florida Statutes
- Updated Local Housing Assistance Plan (LHAP) is required triennially to receive future funding.
- Concise description of the local housing assistance strategies and local housing incentive strategies setting forth the program operations for three fiscal year periods:

  FY 2025/26 FY 2026/27 FY 2027/28

- Due May 2nd to the Florida Housing Finance Corporation

State Housing Initiatives Partnership (SHIP) – Future Funding

SHIP Distribution 2025-26 Estimates

County	$ 2,880,668
City Share	$ 146,198
Total	$ 3,026,866

State Housing Initiatives Partnership (SHIP) – Set-Aside Requirements

- Entire allocation subject to set-aside requirements:

Set-aside	%	$	Strategy
Home ownership	65	1,967,462.90	Purchase Assistance, Owner Occupied Rehab (OOR), Demo Replacement of Manufacture Home, Emergency Home Repair & Resilience, Community Land Trust (CLT)
Construction	75	2,270,149.50	New Construction Assistance, OOR, Demo Replacement of Manufacture Home, Emergency Home Repair & Resilience, CLT, and Rental units
Special Needs	20	605,373.20	
Very Low-Income	30	908,059.80	
Low-Income	30	908,059.80	

State Housing Initiatives Partnership (SHIP) – Strategies

Strategy	
Purchase Assistance	Down Payment & Closing Costs for 1st homebuyers
Owner-Occupied Rehabilitation (OOR)	Health and safety, plumbing, roof, electrical, and other items
Emergency Housing Repair & Housing Resilience	Used in lieu of rehab OOR when a dire situation needs to be mitigated immediately.
Demo/Replace of Manufactured Homes	Used in lieu of rehab when costs > 51% of replacement value.
Disaster Assistance	Short term and immediate assistance to households as a result of a declared disaster
New Construction Assistance	Single-family housing through developers, e.g. Habitat

State Housing Initiatives Partnership (SHIP) – Strategies

Rental Rehabilitation	Rehab of existing housing
Rental Acquisition	Purchase of existing units/land for rental housing
Rental Development	Support the construction of new rental housing
Community Land Trust (CLT) Acquisition & Development	Purchase of existing units/land for New Construction on land that is or will be owned by a CLT

State Housing Initiatives Partnership (SHIP) – Timeline

- March 12, 2025 – Draft review by Florida Housing Finance Corporation (FHFC)
- March 18, 2025 – Recommended for approval by the Affordable Housing Advisory Committee (AHAC)
- April 2, 2025 – Action by the Naples City Council
- April 22, 2025 – Action by Collier County Board of Commissioners
- May 2, 2025 – Deadline for submittal to FHFC
- July 1, 2025 – Program Year commences

<u>Plans can be amended</u>

State Housing Initiatives Partnership (SHIP)

QUESTIONS???

Collier County and the City of Naples

SHIP LOCAL HOUSING ASSISTANCE PLAN (LHAP)

2025-2026, 2026-2027, 2027-2028

Table of Contents

Description	Page #
Section I, Program Details	**3**
Section II, Housing Strategies	**7**
A. Purchase Assistance	**7**
B. Owner-Occupied Rehabilitation	**9**
C. Emergency Housing Repair & Housing Resilience	**11**
D. Demolition and Replacement of Manufactured Housing	**14**
E. Disaster Assistance	**17**
F. New Construction Assistance	**19**
G. Rental Rehabilitation	**21**
H. Rental Acquisition	**22**
I. Rental Development	**24**
J. Community Land Trust Acquisition & Development	**26**
Section III, Incentive Strategies	**28**
A. Expedited Permitting	**28**
B. Ongoing Review Process	**28**
C. Other Incentive Strategies Adopted	**29**
Exhibits	**30**
A. Administrative Budget for each fiscal year covered in the Plan B. Timeline for Estimated Encumbrance and Expenditure C. Housing Delivery Goals Chart (HDGC) For Each Fiscal Year Covered in the plan D. Signed LHAP Certification E. Signed, dated, witnessed, or attested adopting resolution F. Ordinance: (If changed from the original creating ordinance) G. Interlocal Agreement H. Short Sale Policy & Short Sale Application. I. Essential Personnel Certification.	

J. Subordination Policy & Subordination Request Form. K. Community Land Trust Acquisition & Development Instructions	

Section I. Program Details:

A. LG(s)

Name of Local Government	**COLLIER COUNTY BOARD OF COUNTY COMMISSIONERS**
Does this LHAP contain an interlocal agreement?	**Yes**
If yes, name of other local government(s)	**City of Naples**

B. Purpose of the program:

- To meet the housing needs of the very low, low, and moderate-income households.
- To expand production of and preserve affordable housing; and
- To further the housing element of the local government's comprehensive plan specific to affordable housing.

C. Fiscal years covered by the Plan: 2025-2026, 2026-2027, 2027-2028

D. Governance: The SHIP Program is established in accordance with Section 420.907-9079, Florida Statutes and Chapter 67-37, Florida Administrative Code. Cities and Counties must be in compliance with these applicable statutes, rules, and any additional requirements as established through the Legislative process.

E. Local Housing Partnership: The SHIP Program encourages building active partnerships between government, lending institutions, builders and developers, not-for-profit and community-based housing providers and service organizations, providers of professional services related to affordable housing, advocates for low-income persons, real estate professionals, persons or entities that can provide housing or support services, and lead agencies of the local continuums of care.

F. Leveraging: The Plan is intended to increase the availability of affordable residential units by combining local resources and cost-saving measures into a local housing partnership and using public and private funds to reduce the cost of housing. SHIP funds may be leveraged with or used to supplement other Florida Housing Finance Corporation programs and to provide local match to obtain federal housing grants or programs.

G. Public Input: Public input was solicited through face-to-face meetings with housing providers, social service providers, local lenders, and neighborhood associations. Public input was solicited through the local newspaper in the advertising of the Local Housing Assistance Plan and the Notice of Funding Availability.

H. Advertising and Outreach: SHIP funding availability shall be advertised in a newspaper of general circulation and periodicals serving ethnic and diverse neighborhoods, and the Collier County website at least 30 days before the beginning of the application period. If no funding is available due to a waiting list, no notice of funding availability is required.

For advertisements other than NOFAs, the County will accept applications during the dates specified in the advertisement distributed via the County website, email, or via the County procurement office.

I. Waiting List/Priorities: A waiting list will be established when there are eligible applicants for strategies that no longer have funding available. Those households on the waiting list will be notified of their status. Applicants will be maintained in an order that is consistent with the time completed applications were submitted as well as any established funding priorities as described in this plan.

Applications will be accepted and approved on a first come, first-qualified basis with priority given to households with a special needs occupant, or other priorities that may be deemed by the program funder, Florida Housing Finance Corporation.

When funds are available for a strategy, the applicants from the waiting list will be contacted to complete/update the application for SHIP assistance. Applicants will be placed in the queue for assistance once they have provided all required documentation and been deemed SHIP eligible.

Once there is a list of eligible applicants, they will be ranked in the following order. The following priorities for funding listed here apply to all strategies unless otherwise stated in an individual strategy in Section II:

RANKING PRIORITY

1. Special Needs Households – Very low, low, and moderate-income households and persons with special needs as defined in 420.0004 (13)
- a) Very low
- b) Low
- c) Moderate

2. Essential Services Personnel (ESP)
- a) Very Low
- b) Low
- c) Moderate

3. After Special Needs Set-asides and after ESP applicants
- a) Very Low
- b) Low
- c) Moderate

J. Discrimination: In accordance with the provisions of ss.760.20-760.37 and ss. 760.01-760.11, it is unlawful to discriminate on the basis of race, color, religion, sex, national origin, age, handicap, or marital status in the award application process for eligible housing.

K. Support Services and Counseling: Support services are available from various sources. Available support services may include but are not limited to: Homeownership Counseling (Pre and Post), Credit Counseling, Tenant Counseling, and Foreclosure Counseling.

L. Purchase Price Limits: The sales price or value of new or existing eligible housing may not exceed 90% of the average area purchase price in the statistical area in which the eligible housing is located. Such average area purchase price may be calculated for any 12-month period beginning not earlier than the fourth calendar year prior to the year in which the award occurs. The sales price of new and existing units can be lower but may not exceed 90% of the average area purchase price established by the U.S. Treasury Department or as described above.

The methodology used is:

U.S. Treasury Department	X
Local HFA Numbers	

M. Income Limits, Rent Limits and Affordability: The Income and Rent Limits used in the SHIP Program are

updated annually by the Department of Housing and Urban Development and posted at www.floridahousing.org.

"Affordable" means that monthly rents or mortgage payments including taxes and insurance do not exceed 30 percent of that amount which represents the percentage of the median annual gross income for the households as indicated in Sections 420.9071, F.S. However, it is not the intent to limit an individual household's ability to devote more than 30% of its income to housing, and housing for which a household devotes more than 30% of its income shall be deemed Affordable if the first institutional mortgage lender is satisfied that the household can afford mortgage payments in excess of the 30% benchmark and in the case of rental housing does not exceed those rental limits adjusted for bedroom size.

N. Welfare Transition Program: Should an eligible sponsor be used, a qualification system and selection criteria for applications for Awards to eligible sponsors shall be developed, which includes a description that demonstrates how eligible sponsors that employ personnel from the Welfare Transition Program will be given preference in the selection process.

O. Monitoring and First Right of Refusal: In the case of rental housing, the staff and any entity that has administrative authority for implementing the local housing assistance plan assisting rental developments shall annually monitor and determine tenant eligibility or, to the extent another governmental entity provides periodic monitoring and determination, a municipality, county, or local housing financing authority may rely on such monitoring and determination of tenant eligibility. However, any loan or grant in the original amount of $10,000 or less shall not be subject to these annual monitoring and determination of tenant eligibility requirements. Tenant eligibility will be monitored annually for no less than 30 years or the term of assistance whichever is longer unless as specified above. Eligible sponsors that offer rental housing for sale before 30 years or that have remaining mortgages funded under this program must give a first right of refusal to eligible nonprofit organizations for purchase at the current market value for continued occupancy by eligible persons.

P. Administrative Budget: A line-item budget is attached as Exhibit A. The city/county finds that the moneys deposited in the local housing assistance trust fund is necessary to administer and implement the local housing assistance plan.

Section 420.9075 Florida Statute and Chapter 67-37, Florida Administrative Code, states: *"A county or an eligible municipality may not exceed the 5 percent limitation on administrative costs, unless its governing body finds, by resolution, that 5 percent of the local housing distribution plus 5 percent of program income is insufficient to adequately pay the necessary costs of administering the local housing assistance plan."*

Section 420.9075 Florida Statute and Chapter 67-37, Florida Administrative Code, further states: "*The cost of administering the program may not exceed 10 percent of the local housing distribution plus 5 percent of program income deposited into the trust fund, except those small counties, as defined in s. 120.52(19), and eligible municipalities receiving a local housing distribution of up to $350,000 may use up to 10 percent of program income for administrative costs." The applicable local jurisdiction has adopted the above findings in the resolution attached as Exhibit E.*

Q. Program Administration: Administration of the local housing assistance plan will be performed by:

Entity	Duties	Admin. Fee Percentage
Local Government	**Collier County Government**	**10%**
Third-Party Entity/Sub-recipient		

R. First-time Homebuyer Definition: For any strategies designed for first-time homebuyers, the following definition will apply: *An individual who has had no ownership in a principal residence during the 3-year period ending on the date of purchase of the property. This includes a spouse (if either meets the above test, they are considered first-time homebuyers). A single parent who has only owned a home with a former spouse while married. An individual who is a displaced homemaker and has only owned with a spouse. An individual who has only owned a principal residence not permanently affixed to a permanent foundation in accordance with applicable regulations. An individual who has only owned a property that was not in compliance with state, local, or model building codes and which cannot be brought into compliance for less than the cost of constructing a permanent structure.*

S. Project Delivery Costs: In addition to the administrative costs listed above, the county or sponsor will charge a project delivery fee according to the below table to cover inspections and other eligible project delivery activities performed by the county or non-county employees. The delivery cost will be included in the maximum award to the applicant. The below listed strategies will include, but not be limited to, such activities as: Inspections, work write-ups, recording fees, application & processing fees, development of assessments, and cost estimates. This is a fixed price reimbursement that does not require timesheets and payroll documentation to support the associated cost.

STRATEGIES **Owner-Occupied Rehabilitation** **Demolition and Replacement** **Emergency Repair Housing Resilience** **Amount of the Project**	**Fixed Price Project Delivery**
$1.00 - $10,998	$ 500.00
$10,999-$25,998	$1,500.00
$25,999-$35,998	$2,000.00
$35,999- or more	$2,500.00

STRATEGY **Rental Rehabilitation** **Amount of the Project**	**Fixed Price Project Delivery**
$1.00 - $200,998	$ 5,000.00
$200,999-$400,998	$10,000.00
$400,999-$600,998	$12,000.00
$600,999- or more	$16,000.00

T. Essential Service Personnel Definition (ESP): Collier County defines Essential Service Personnel as follows: Those individuals employed in the community as teachers, educators, other school district employees, community college and university employees, police and fire personnel, health care personnel, skilled building trades personnel, and government employees.

U. Describe efforts to incorporate Green Building and Energy Saving products and processes: The County will, when economically feasible, employ the following Green Building requirements on rehabilitation and

emergency repairs:
All housing rehabilitation and new construction will incorporate "green" standards including but not limited to:

- Appliances replaced or installed shall be Energy Star.
- Doors and/or windows replaced or installed shall be Energy Star; and
- Any lighting fixture replaced or installed shall be Energy Star
- Weatherization shall be incorporated into all homes rehabilitated including but not limited to weatherization of the attic, floor insulation, if appropriate, and sealing of exterior walls. New construction is presumed to meet the minimum insulation and sealing requirements. Any replaced or new HVAC unit shall have a SEER rating of at least 14.

These requirements may be adjusted for rental developments if the requirement of other construction funding sources requires a more prescriptive list.

Innovative design, green building principles, storm-resistant construction, or other elements that reduce long-term costs relating to maintenance, utilities, or insurance may be encouraged.

Homeownership Education classes provide a curriculum on cost-cutting measures that homeowners can use to reduce energy consumption. Collier County also encourages the use or inclusion, when appropriate, of the following: energy star appliances; Low-E windows; additional insulation (for increased R-Value); ceramic tile; tank-less water heater; 14 and 15 SEER air conditioning units; stucco; LED light bulbs; impact resistant windows and doors.

V. Describe efforts to meet the 20% Special Needs set-aside: Prioritization of funding will include all strategies for persons with special needs, with an emphasis on rental programs and rehabilitation. Outreach for clients will include marketing to a variety of agencies, including but not limited to, the Agency for Persons with Disabilities, United Cerebral Palsy, Community Assisted and Supported Living, etc. Additionally, advertisements in publications of general circulation may also be used.

W. Describe efforts to reduce homelessness: Collier County supports the Continuum of Care (CoC) efforts to simplify and broaden outreach and assessment for homeless persons in the County. Much of the outreach to homeless persons is conducted at community events such as the Point in Time Count. Additionally, outreach is conducted by the many caseworkers at community agencies, the SW Florida Coalition on Homelessness, schools, and other not-for-profit social service entities that encounter the homeless during service delivery or during their regular course of business. Needs are assessed during these points of contact, and referrals are made as appropriate for shelter, food, counseling, or other needs. The County works closely with various agencies and local resources utilizing federal ESG and State SHIP funds.

Section II. LHAP Strategies:

A. Purchase Assistance without Rehabilitation	Code 2

a. **Summary:** SHIP funds will be awarded to first-time homebuyers for down payment and closing costs to purchase a newly constructed or an existing single-family home, manufactured home, or condominium.

b. **Fiscal Years Covered:** 2025-2026, 2026-2027, 2027-2028

c. **Income Categories to be served:** Very low, low, and moderate

d. **Maximum award:**

Very Low:	$110,000 ESP, $100,000 non-ESP
Low:	$ 90,000 ESP, $ 80,000 non-ESP
Moderate:	$ 80,000 ESP, $ 70,000 non-ESP

(Additional $10,000 for Essential Service Personnel-ESP))

e. **Terms:**

1. Repayment loan/deferred loan/grant: Funds will be awarded as a deferred payment loan secured by a recorded subordinate mortgage and promissory note.
2. Interest Rate: 0%
3. Years in loan term: 30 years
4. Forgiveness: If all conditions have been met, the loan is forgiven entirely at the end of the 30-year term. In cases where the qualifying homeowner(s) die(s) during the loan term, the loan will be forgiven.
5. Repayment: Monthly payments are not required
6. Default: The loan will be determined to be in default if any of the following occurs during the Loan term: sale, transfer, or conveyance of property; conversion to rental property; or failure to occupy the home as primary residence. If any of these occur, the outstanding balance will be due and payable. Persons that qualify for SHIP assistance will be required to contractually agree to all SHIP program guidelines, County SHIP mortgage requirements, and repayment provisions, and certify that the unit assisted will be their primary residence.

In addition to the above, the loan may be determined to be in default if any of the following occurs:

i. Sale: if proceeds are not enough to pay off the promissory note then the homeowner may contact the County Regarding a settlement amount of the SHIP loan that is outlined in the County's "Short Sale Policy".
ii. Title transfer: either voluntary or by operation of law, divested of title by judicial sale, levy, or other proceedings, including foreclosure or Deed in Lieu.
iii. Refinance: may be allowed in accordance with the published "Subordination Policy".
iv. Home is no longer primary residence, abandoned, leased, or rented.

The County reserves the right to foreclose if the homeowner does not repay the loan as noted above.

If the home is foreclosed on by a superior mortgage holder, the County may try to recapture funds through the legal process if it is determined that adequate funds may be available to justify pursuing a recapture.

f. **Recipient Selection Criteria:** Applicants will be ranked for assistance based on a first-qualified, first-served basis with the priorities for Special Needs, Essential Services Personnel, and income groups as described in Section I, Program Details, of this plan.

g. **Sponsor Selection Criteria**: N/A

h. **Additional Information:** Applicants must secure a first mortgage from a licensed mortgage lender. Other requirements:

1. Manufactured homes constructed after mid-June 1994 are considered eligible housing pursuant to Section 420.9071 (9), Florida Statute.
2. First mortgage must be at a fixed rate; no ARMs, prepayment penalty, negative amortizations, balloon loans, owner financing, or other non-affordable loan terms are allowed.
3. A newly constructed home must have received a Certificate of Occupancy within the twelve months

prior to purchase. A manufactured home must be in place with all site requirements met and a valid certificate of occupancy. Funding, which is provided as a subordinate mortgage loan, may be used for down payment, closing costs, and principal buy-down as needed for affordable home ownership.

4. Refinance may be allowed in accordance with the published "Subordination Policy".
5. An applicant may submit a completed application for housing assistance to the County for a determination of eligibility at any time. Applicants are required to provide all documentation requested for income, eligibility, and qualification determination.
6. Funds will be reserved and awarded to applicants who have met all the County requirements, are SHIP Income Certified, and have a mortgage loan pre-approval from a participating Lender prior to applying.
7. Applicants must attend a HUD-approved Homebuyer Education Program and provide a copy of the certificate to the Division prior to closing on a home. The certificate must be dated within 12 months r of the income certification date.
8. Verification of US Citizenship or Permanent Residency Status: All borrowers must submit one of the following: U.S. Passport, Birth Certificate, naturalization, and or permanent residence card.
9. Asset Cap or Liquid Assets: All applicants will be limited to a cash or liquid asset of $30,000.00 upon completion of their assistance. However, the Board of County Commissioners will have the authority to suspend the asset cap/liquid assets in determining income qualifications during recovery from a declared disaster.

B. Owner-Occupied Rehabilitation	**Code 3**

a. **Summary:** SHIP funds will be awarded to households needing repairs to correct code violations, health, and safety issues, electrical, plumbing, roofing, windows, other structural items, and relocation, if necessary. Assistance may include costs related to all eligible repairs, inspections, work write-ups, recording fees, and project delivery fees.

b. **Fiscal Years Covered:** 2025-2026, 2026-2027, 2027-2028

c. **Income Categories to be served:** Very low, low, and moderate

d. **Maximum award:** - $92,500 (up to $75,000 for rehabilitation expenses, up to $2,500.00 project delivery cost, and up to $-$15,000 for relocation expenses if necessary)

e. **Terms:**

1. Repayment loan/deferred loan/grant: Funds will be awarded as a deferred payment loan secured by a recorded subordinate mortgage and promissory note or Florida Department of Motor Vehicle Title for manufactured homes.
2. Interest Rate: 0%
3. Years in loan term: 15 years
4. Forgiveness: If all conditions of the loan agreement are met, one-third of the loan will be forgiven in five-year increments so that at the end of the fifteenth (15) year the loan is fully forgiven. In cases where the qualifying homeowner(s) die(s) during the loan term, the loan will be forgiven.
5. Repayment: Monthly payments are not required.
6. Default: The loan will be determined to be in default if any of the following occurs during the Loan term: sale, transfer, or conveyance of property; conversion to rental property; or failure to occupy the home as primary residence. If any of these occur, the outstanding balance will be due and payable. Persons that qualify for SHIP assistance will be required to contractually agree to all SHIP program

guidelines, County SHIP mortgage requirements, and repayment provisions, and certify that the unit assisted will be their primary residence.

In addition to the above, repayment of the loan is required in full when one of the following conditions is met, whichever occurs first:

i. Sale: if proceeds are not enough to pay off the promissory note, then the homeowner may contact the County regarding a settlement amount of the SHIP loan that is outlined in the County's "Short Sale Policy".
ii. Title transfer: either voluntary or by operation of law, divested of title by judicial sale, levy, or other proceedings, including foreclosure or Deed in Lieu.
iii. Refinance: may be allowed in accordance with the published "Subordination Policy".
iv. Home is no longer primary residence, abandoned, leased, or rented.

The County reserves the right to foreclose if the homeowner does not repay the loan as noted above.

If the home is foreclosed on by a superior mortgage holder, the county may attempt to recapture funds through the legal process if is determined that adequate funds may be available to justify pursuing a repayment.

f. **Recipient Selection Criteria:** Applicants will be ranked for assistance based on a first-qualified, first-served basis with the priorities for Special Needs, Essential Services Personnel, and income groups as described in Section I, Program Details, of this plan.

An applicant may submit a completed application for SHIP Owner-Occupied Rehabilitation to the County/Sponsor for determination of eligibility at any time. Applicants are required to provide all documentation requested for income, eligibility, and qualification determination. Applicants will receive a pre-approval letter and their file will be submitted to the Sponsor for unit eligibility.

1. Must provide proof of homeowner's insurance or attestation of no insurance.

2. Property taxes must be current at the time of application and closing. Delinquent property taxes are a basis for denial.

3. If applicable, must file a claim for and use proceeds from insurance and/or FEMA as first option.

4. Where the unit and land are owned by the same person, the unit assisted must be owner-occupied and, have applied for, or already be homesteaded as the primary residence. Owner-occupied manufactured homeowners renting their lot may also apply for assistance.

5. Verification of US Citizenship or Permanent Residency Status: All borrowers must submit one of the following: U.S. Passport, Birth Certificate, naturalization, and or permanent residence card.

6. Asset Cap or Liquid Assets: All applicants will be limited to a cash or liquid asset of $30,000.00 upon completion, and rehabilitation assistance. However, the Board of County Commissioners will have the authority to suspend the asset cap/liquid assets in determining income qualifications during recovery from a declared disaster.

7. Primary Residence: Documentation used for verification of primary residence includes, but is not limited to: homestead exemption, utility bill(s), Tax return or driver's license.

g. **Sponsor Selection Criteria:** The County will issue a notice of Grant Application for SHIP funding from non-profit/for-profit organizations.

Sponsor organizations must apply and provide any related information, specified by the SHIP Administrator, to be used for evaluation of sponsor eligibility.

CHS staff will evaluate each application submitted. In the initial phase, staff will review the application for general conformance with the submission requirements. The evaluation phase will consist of an in-depth review of the following:

- Compliance with SHIP regulations
- Project risk analysis
- Financial risk analysis
- Capacity and experience
- Project feasibility
- Adherence to SHIP eligibilities/requirements
- Past performance evaluation

h. **Additional Information:** Manufactured homes will only be eligible for housing assistance if owner occupied, is affixed to the ground, the land is (a) owned and homesteaded by the occupant or (b) leased/rented by the homeowner. Manufactured homes constructed from mid-June 1994 forward are considered eligible housing pursuant to Section 420.9071 (8), Florida Statute. The repairs must not exceed 90% of the value of the existing property and residence, and all repairs are within existing codes for the property. For an owner-occupied mobile or manufactured home on land that is leased, a State of Florida Vehicle Certificate of Title will list Collier County Board of County Commissioners on the title as the security interest in the unit.

Homeowners may receive additional Rehabilitation funding provided it has been at least three (3) years since the last rehabilitation. Disaster-related funding is exempt from this restriction.

C. Emergency Housing Repair & Housing Resilience	**Code 6**

a. **Summary:** SHIP funds will be awarded to owner-occupied households in need of rehabilitation, and/or repair of their home related to a dire situation that needs to be mitigated immediately. Eligible rehabilitation and repair are:

- Remediation of an immediate health hazard to the occupants;
- Elimination of a developing threat to the dwelling or infrastructure;
- Structural elevation, rehabilitation, impact windows, doors, and/or waterproofing of the structure or critical components to comply with the local housing code and with Chapter 553. F.S and;
- Improving the home's resilience to the impact of a future disaster.

SHIP funds may be awarded to applicants requiring emergency power generator installation if 1. A member of the household meets the Special Needs set-aside criterion; and 2. A written statement from a healthcare provider indicating that electricity is bona fide medically necessary.

Proof of insurance claim must be submitted, if applicable. SHIP funds may also be awarded to pay

the Homeowner's Insurance Policy and/or Flood Insurance Policy for one year, if no insurance is in place at the time of the award. Homeowner's insurance and Flood insurance are a grant with no recapture terms.

SHIP funds may be used to assist with the payment of relocation and storage/moving costs associated with the rehabilitation of the residence.

b. **Fiscal Years Covered**: 2025-2026, 2026-2027, 2027-2028

c. **Income Categories to be served**: Very Low, and Low

d. **Maximum award:** $127,500 – (up to $100,000 for rehabilitation and $10,000 for insurance expenses, up to $2,500.00 project delivery cost, and up to $15,000 for relocation and storage/moving expenses if necessary)

e. **Terms**:

1. Repayment loan/deferred loan/grant: Funds will be awarded as a deferred payment loan secured by a recorded subordinate mortgage and promissory note. Homeowner's insurance and Flood insurance is a grant with no recapture terms.
2. Interest Rate: 0%
3. Years in loan term: 15 years
4. Forgiveness: If all conditions of the loan agreement are met, one-third of the loan will be forgiven in five-year increments so that at the end of the fifteenth (15) year the loan is fully forgiven. In cases where the qualifying homeowner(s) die(s) during the loan term, the loan will be forgiven.
5. Repayment: Monthly payments are not required.
6. Default: The loan will be determined to be in default if any of the following occurs during the Loan term: sale, transfer, or conveyance of property; conversion to rental property; or failure to occupy the home as primary residence. If any of these occur, the outstanding balance will be due and payable. Persons that qualify for SHIP assistance will be required to contractually agree to all SHIP program guidelines, County SHIP mortgage requirements, and repayment provisions, and certify that the unit assisted will be their primary residence.

In addition to the above, repayment of the loan is required in full when one of the following conditions is met, whichever occurs first:

i. Sale: if proceeds are not enough to pay off the promissory note, then the homeowner may contact the County regarding a settlement amount of the SHIP loan that is outlined in the County's "Short Sale Policy".
ii. Title transfer: either voluntary or by operation of law, divested of title by judicial sale, levy, or other proceedings, including foreclosure or Deed in Lieu.
iii. Refinance: may be allowed in accordance with the published "Subordination Policy".
iv. Home is no longer primary residence, abandoned, leased, or rented.

The County reserves the right to foreclose if the homeowner does not repay the loan as noted above.
If the home is foreclosed on by a superior mortgage holder, the county may attempt to recapture funds through the legal process if is determined that adequate funds may be available to justify pursuing a repayment.

f. **Recipient Selection Criteria:** Applicants will be ranked for assistance based on a first-qualified, first-served basis with the priorities for Special Needs, Essential Services Personnel, and income groups as described in

Section I, Program Details, of this plan.

An applicant may submit a completed application for SHIP Emergency Housing Repair and Resilience to the County/Sponsor for determination of eligibility at any time. Applicants are required to provide all documentation requested for income, eligibility, and qualification determination. Applicants will receive a pre-approval letter and their file will be submitted to the Sponsor for unit eligibility.

1. Must provide proof of homeowner's insurance or attestation of no insurance.

2. Property taxes must be current at the time of application and closing. Delinquent property taxes are a basis for denial.

3. If applicable, must file a claim for and use proceeds from insurance and/or FEMA as the first option. If applicable.

4. Where the unit and land are owned by the same person, the unit assisted must be owner-occupied and, have applied for, or already be homesteaded as the primary residence. Owner-occupied manufactured homeowners renting their lot may also apply for assistance.

5. Verification of US Citizenship or Permanent Residency Status: All borrowers must submit one of the following: U.S. Passport, Birth Certificate, naturalization, and or permanent residence card.

6. Asset Cap or Liquid Assets: All applicants will be limited to a cash or liquid asset of $30,000.00 upon completion, and rehabilitation assistance. However, the Board of County Commissioners will have the authority to suspend the asset cap/liquid assets in determining income qualifications during recovery from a declared disaster.

7. Primary Residence: Documentation used for verification of primary residence includes, but is not limited to: homestead exemption, utility bill(s), or driver's license.

g. **Sponsor Selection Criteria:** The County will issue a notice of Grant Application for SHIP assistance from non-profit/for-profit organizations.

Sponsor organizations must apply and provide any related information, specified by the SHIP Administrator, to be used for evaluation of sponsor eligibility.

CHS staff will evaluate each application submitted. In the initial phase, staff will review the application for general conformance with the submission requirements. The evaluation phase will consist of an in-depth review of the following:

- Compliance with SHIP regulations
- Project risk analysis
- Financial risk analysis
- Capacity and experience
- Project feasibility
- Adherence to SHIP eligibilities/requirements
- Past performance evaluation

Additional Information: Manufactured homes will only be eligible for housing assistance if the owner-occupied, is affixed to the ground, the land is (a) owned and homesteaded by the occupant or (b) leased/rented by the homeowner. Manufactured homes constructed from mid-June 1994 forward are considered eligible housing pursuant to Section 420.9071 (8), Florida Statute. The repairs must not exceed 90% of the value of the existing property and residence, and all repairs are within existing codes for the property. For an owner-occupied mobile or manufactured home on land that is leased, a State of Florida Vehicle Certificate of Title will list Collier County Board of County Commissioners on the title as the security interest in the unit.

Homeowners may receive additional Rehabilitation funding provided it has been at least three (3) years since the last rehabilitation. Disaster-related funding is exempt from this restriction.

D. Demolition and Replacement of Manufactured Housing	**Code 4**

a. **Summary:** SHIP funds will be awarded to homeowners in need of demolition and replacement of manufactured housing. This strategy will be used in place of rehabilitation when costs to repair the home are determined to exceed 51% of the home's value, as determined by the Collier County Property Appraiser office or the structure must be certified by the SHIP inspector or Growth Management determination as not suitable for rehabilitation. The goal is to prevent the imminent displacement of homeowners due to distressed conditions, encourage revitalization, and increase the supply of safe, decent, and sanitary housing. Awards made under this strategy will not exceed 20% of the County's allocation.

i. The property site must be suitable for demolition/replacement. Loans for assistance may include costs related to all eligible demolition activities, debris removal, permits, transportation, installation, inspections by the sponsor or vendor, work write-ups, sales tax, recording fees, and project delivery fees.

ii. One-time annual premium payment of a Homeowner's insurance and/or Flood Insurance Policy for homeowners not covered under an insurance policy at the time of home replacement.

b. **Fiscal Years Covered:** 2025-2026, 2026-2027, 2027-2028

c. **Income Categories to be served:** Very low, low, and moderate

d. **Maximum award:** $227,500. (Up to $200,000 for construction, $2,500 for project delivery and up to $15,000 for relocation/moving/storage expenses, and $10,000 for Homeowners' and/or flood insurance)

e. **Terms:**

1. Repayment loan/deferred loan/grant: Funds will be awarded as a deferred payment loan secured by a recorded subordinate mortgage and note, or if the unit is on leased land, a security instrument in accordance with the Florida Department of Motor Vehicles will be recorded.
2. Interest Rate: 0%
3. Years in loan term: 30 years
4. Forgiveness: If all conditions of the loan are met, one-third of the loan will be forgiven in ten-year increments so that at the end of the thirtieth year the loan is forgiven. In cases where the qualifying homeowner(s) die(s) during the loan term, the loan will be forgiven.
5. Repayment: Monthly payments are not required.
6. Default: The loan will be determined to be in default if any of the following occurs during the Loan

term: sale, transfer, or conveyance of property; conversion to rental property; or failure to occupy the home as primary residence. If any of these occur, the outstanding balance will be due and payable. Persons who qualify for SHIP assistance will be required to contractually agree to all SHIP program guidelines, County SHIP mortgage requirements, and repayment provisions, and certify that the unit assisted will be their primary residence.

In addition to the above, the loan will be determined to be in default if any of the following occurs during the Loan term:

i. Sale: if proceeds are not enough to pay off the promissory note then the property owner may contact the County regarding a settlement amount of the SHIP loan in accordance with the "Short Sale Policy".
ii. Title transfer: either voluntary or by operation of law, divested of title by judicial sale, levy, or other proceedings, including foreclosure or Deed in Lieu.
iii. Refinance: may be allowed in accordance with the published "Subordination Policy".
iv. Home is no longer primary residence, abandoned, leased, or rented.

f. **Recipient Selection Criteria**: Applicants will be ranked for assistance based on a first-qualified, first-served basis with the priorities for Special Needs, Essential Services Personnel, and income groups as described in Section I, Program Details, of this plan.

g. **Sponsor Selection Criteria:** The County will issue a Request for Proposals for SHIP funding for demolition and replacement of manufactured housing from non-profit/for-profit organizations.

Sponsor organizations must submit an application and provide any related information, specified by the SHIP Administrator, to be used for evaluation of sponsor eligibility.

CHS staff will evaluate each application submitted. In the initial phase, staff will review the application for general conformance with the submission requirements. The evaluation phase will consist of an in-depth review of the following:

- Compliance with SHIP regulations
- Project risk analysis
- Financial risk analysis
- Capacity and experience
- Project feasibility
- Adherence to SHIP eligibilities/requirements
- Past performance evaluation

Vendor Selection Criteria: The vendor may submit a proposal at any time to deliver services under this strategy. The vendor may be a contractor, supplier or service provider who is involved in manufactured housing development and/or construction. No project delivery fee will be paid to the vendor. Vendors are exempt from procurement since their selection will be based on the price of their product and ability to deliver the product and service.

Vendors must submit a proposal and provide any related documentation, as specified by the SHIP Administrator, for evaluation of vendor eligibility.

CHS staff will review each proposal. The staff will assess general conformance with the following:

- Ability to comply with SHIP regulations

- Qualifications and licensing
- Financial stability and capacity
- Experience and past performance, if applicable
- Ability to meet project timelines and deliverables
- Price of goods or services

h. Additional Information:

An applicant shall submit a completed application for Demolition and Replacement Housing assistance to the County for a determination of eligibility at any time. Applicants are required to provide all documentation requested for income, eligibility, and qualification determination.

1. For manufactured homes not located on leased or rental land, ownership must be a fee simple estate at the time of closing with the name of the applicants on the title.

2. Property taxes must be current at the time of application and closing. Delinquent property taxes are a basis for denial.

3. The value after replacement may not exceed the SHIP maximum allowable purchase price for existing homes.

4. The replacement housing shall be consistent with the character of the household, neighborhood, and area-wide market conditions. The homeowner may choose the most suitable replacement housing to meet their needs.

5. The existing home must be damaged or in disrepair to the extent that the home is condemned by Collier County Growth Management Community Development Department, the Department of Health, or the County's third-party inspector/general contractor.

6. Must provide proof of homeowner's insurance or attestation of no insurance.

7. If applicable, must file a claim for and use proceeds from insurance as the first option.

8. If applicable, must complete an FHFC-approved "Disaster Self-Declaration of Income" form, if this strategy is used during a declared disaster.

9. Where the unit and land are owned by the same person, the unit assisted must be owner-occupied and have applied for, or already be homesteaded as the primary residence. Owner-occupied manufactured homeowners renting their lot may also apply for assistance.

10. Verification of US Citizenship or Permanent Residency Status: All borrowers must submit one of the following: U.S. Passport, Birth Certificate, naturalization, and or permanent residence card.

11. Asset Cap or Liquid Assets: All applicants will be limited to a cash or liquid asset of $30,000.00 upon completion of the demolition and replacement assistance. This asset cap applies to all SHIP strategies. However, the Board of County Commissioners will have the authority to suspend the asset cap/liquid assets in determining income qualifications during recovery from a declared disaster.

12. Primary Residence: Documentation used for verification of primary residence includes, but is not

limited to homestead exemption, utility bill(s), or driver's license.

SHIP funds can be used to bring the building site and improvements up to Local, State, and Federal requirements, Homeowner's Association by-laws, and/or to adequately replace the amenities of the existing home. These additional site improvement costs may include, but are not limited to geotechnical surveys, engineering, concrete pilings/piers, septic system improvements, fill, sod, driveways, storage sheds, and any other requirements as noted above.

E. Disaster Assistance	**Codes 5 & 16**

a. Summary: Disaster Assistance aids households in incorporated or unincorporated Collier County in the aftermath of a disaster as declared by the President of the United States or Governor of the State of Florida, to include households that were displaced or financially impacted in another disaster-affected area and then relocated to Collier County after the disaster event. This strategy will only be funded and implemented in the event of a disaster using any funds that have not yet been encumbered or with additional disaster funds allocated by the Florida Housing Finance Corporation. SHIP disaster funds may be used for items such as, but not limited to:

(b) Purchase of emergency supplies for eligible households to weatherproof damaged homes.

(c) Interim repairs to avoid further damage; tree and debris removal required to make the individual housing unit habitable.

(d) Construction of wells and septic or repair of existing wells and septic systems where public water and/or sewer are not available.

(e) Payment of insurance deductibles for rehabilitation of homes covered under homeowners' insurance policies.

(e) Security deposit and additional move-in deposits or fees listed in a lease for eligible recipients who have been displaced from their homes due to a disaster or have experienced a financial impact directly related to the storm.

(f) Temporary Rental and/or relocation assistance for eligible recipients who have been displaced from their homes due to a disaster or have experienced a financial impact directly related to the storm.

(g) Temporary Rental and/or relocation assistance for households with a mortgage that have been displaced due to the disaster while their home is being repaired. This may be in Collier County or outside Collier County due to limited availability post disaster.

(h) Temporary mortgage payments and utility payments for homesteaded homeowners directly financially impacted by a disaster.

(i) Foreclosure prevention services and housing counseling

(j) Relocation and moving expenses, if necessary.

(k) One-time full premium payment of a Homeowner's and/or Flood Insurance Policy for homeowners not covered under an insurance policy at the time of a disaster or those homeowners who could not afford the renewal after the storm due to an insurance premium increase.

i. The homeowner must sign a Property Insurance deferral lien agreement in the amount of the one-year premium.

ii. The debt will be reduced on a pro-rated month-for-month basis during the year, any unused months created by the sale of the property, title transfer, the home is no longer a primary residence, or is leased or rented within the one-year term, will

immediately become due to the County.

iii. One-year term.

iv. Interest Rate (0%)

v. No Payments are required

(l) Hotel or Motel or short-term Rental (VRBO/Airbnb payments for up to 90 days) for recipients displaced and in need of temporary housing until their home and/or rental unit is repaired OR a new unit is secured (Daily lodging rates will be pursuant to U.S General Services Administration (GSA) published rates at the time of the Disaster). This may be provided in Collier County or outside due to limited availability post-disaster.

(m) Rehabilitation/Hardening/Mitigation for owner-occupied residence [i.e., Roofs, Hurricane Impact windows, storm shutters, and doors, installation of generators (special needs required, etc.)] Under this activity, the maximum award amount shall not exceed $75,000.

(n) Strategies included in the approved LHAP that benefit applicants directly affected by the declared disaster.

(o) Other activities as proposed by the county and approved by Florida Housing Finance Corporation.

b. Fiscal Years Covered: 2025-2026, 2026-2027, 2027-2028

c. Income Categories to be Served: Very low, low, and moderate

d. **Maximum award:** $30,000 per household, per declared disaster event. This may include a combination of items listed in Disaster Assistance (a) through (j), (l) (n), and (o). This will be a grant with no recapture terms. Item (k) recapture is specified above.

Maximum award: $75,000 per household. This includes Disaster Assistance item (m) only. This will be a grant with no recapture terms.

e. Terms:

1. Grant: Funds will be awarded as a grant with no recapture terms. Except for Item (k) recapture as specified above.
   The terms of an award under other strategies, if used in conjunction, will apply to the other strategies.
2. Interest Rate: N/A
3. Years in loan term: N/A
4. Forgiveness: N/A
5. Default: N/A

f. Recipient Selection Criteria: Applicants will be assisted on a first-qualified, first-served basis with the following additional requirements:

1. Must provide proof of homeowner's insurance or attestation of no insurance, if applicable.

2. If applicable, homeowners must file a claim for and use proceeds from insurance and/or FEMA as the first option.

3. Must complete an FHFC-approved "Disaster Self-Declaration of Income" form, if applicable. Where the unit and land are owned by the same person, the unit assisted must be owner-

occupied and, have applied for, or already be homesteaded as the primary residence. Owner-occupied manufactured homeowners renting their lot may also apply for assistance.

4. Verification of US Citizenship, Permanent Residency Status or qualified non-citizens as aligned with FEMA. All borrowers must submit one of the following: U.S. Passport, U.S. Birth Certificate, U.S. naturalization document, permanent resident card or proof of immigration status.

5. Primary Residence: Documentation used for verification of primary residence includes, but is not limited to lease, paystubs, homestead exemption, utility bill(s), or driver's license.

g. **Sponsor Selection Criteria**: N/A.

h. **Additional Information:** Residents using this strategy during a disaster are required to submit lease agreements, mortgage statements, past due notices if impacted by a disaster or proper invoices and receipts as applicable for each approved disaster activity above. Mortgage, Rent, Utility and Counseling payments will be made directly to a landlord, financial institution, utility company or contracted community partner. Reimbursement for other Disaster Assistance expenses will require invoices and paid receipts, proof of insurance deductible and proof of FEMA funds, as appropriate. Payments will be made to the vendor/service provider, community partner, or resident. Manufactured homes constructed after mid-June 1994 are considered eligible housing pursuant to Section 420.9071 (8), Florida Statute. Residents will need to provide documentation to demonstrate a relationship and direct impact to the declared disaster.

The County reserves the right to inspect for compliance prior to reimbursement.

F. New Construction Assistance		**Code 10**

a. **Summary:** SHIP funds may be provided to organizations to be used for costs including, but limited to, land acquisition, infrastructure, landscape and development costs, and all associated fees and permits for single-family housing for resale to eligible home buyers in incorporated or unincorporated Collier County. The units may be constructed on infill lots or as a part of a larger development. The funds awarded to the Sponsor will be passed through to the eligible buyer as down payment assistance.

b. **Fiscal Years Covered:** 2025-2026, 2026-2027, 2027-2028

c. **Income Categories to be served:** Very low, low, and moderate

d. **Maximum award (per unit for Sponsor and buyer):** $100,000/unit

e. **Terms:** - **For the Sponsor:**

1. Repayment loan/grant: Deferred Loan secured by a note and mortgage.
2. Interest Rate: 0%
3. Years in loan term for Sponsor: 18 months
4. Forgiveness: The Sponsor's obligation is forgiven upon the successful sale of the unit to an eligible homebuyer with the benefit being passed to the buyer in the form of a reduced sales price or a seller's credit.
5. Repayment: No monthly payments are required.
6. Default: If the property has not been successfully sold to an income-qualified buyer within 18 months of

the date the mortgage and promissory note are entered into, the entire amount is due and payable to the County.

Terms - For the Eligible Homebuyer:

1. Repayment loan/deferred loan/grant**:** Funds will be awarded as a deferred payment loan secured by a recorded subordinate mortgage and promissory note.
2. Interest Rate: 0%
3. Years in loan term: 30 years
4. Forgiveness: If all conditions of the loan are met, then the loan is forgiven after 30 years. In cases where the qualifying homeowner(s) die(s) during the loan term, the loan will be forgiven.
5. Repayments: No monthly payments are required.
6. Default: The loan will be determined to be in default and due and payable if any of the following occurs during the Loan term: sale, transfer, or conveyance of property; conversion to rental property; or failure to occupy the home as a primary residence. If any of these occur, the outstanding balance will be due and payable. Persons who qualify for SHIP assistance will be required to contractually agree to all SHIP program guidelines, County SHIP mortgage requirements, and repayment provisions, and certify that the unit assisted will be their primary residence.
   In addition to the above, the loan may be determined to be in default if any of the following occurs:

   i. Sale: if proceeds are not enough to pay off the mortgage note, then the homeowner may contact the County Regarding a settlement amount of the SHIP loan in accordance with the "Short Sale Policy".
   ii. Title transfer: either voluntary or by operation of law, divested of title by judicial sale, levy or other proceedings, including foreclosure or Deed in Lieu.
   iii. Refinance: may be allowed in accordance with the published "Subordination Policy".
   iv. Home is no longer primary residence, abandoned, leased, or rented.

The county reserves the right to foreclose if the homeowner does not repay the loan as noted above. If the home is foreclosed on by a superior mortgage holder, the county may attempt to recapture funds through the legal process if is determined that adequate funds may be available to justify pursuing a repayment.

f. **Home Buyer Selection Criteria-** Sponsor shall identify applicants and provide the Application intake and income certification of households applying for Construction Assistance, as specified in their agreement with the County.

Applicants will be ranked for assistance based on a first-qualified, first-served basis with the priorities for Special Needs, Essential Service Personnel and income group as described in Section I.

1. Applicants must complete a HUD approved Homebuyer Education Program and provide a copy of the certification to the Sponsor prior to closing on a property. The certificate must be dated prior to the SHIP award date and be good through closing.

2. Verification of US Citizenship or Permanent Residency Status: All borrowers must submit one of the following: U.S. Passport, Birth Certificate, naturalization, and or permanent residence card.

3. Asset Cap or Liquid Assets: All beneficiaries will be limited to a cash or liquid asset of $30,000.00 upon completion of their new construction assistance. However, the Board of County Commissioners will have the authority to suspend the asset cap/liquid assets in determining income qualifications during recovery from a declared disaster.

g. **Sponsor Selection Criteria** – The County will issue a notice of an ongoing Application from non-profit/for-profit organizations.

Sponsor organizations must apply and provide any related information, specified by the SHIP Administrator, to be used for evaluation of sponsor eligibility.

CHS staff will evaluate each application submitted. In the initial phase, staff will review the application for general conformance with the submission requirements. The evaluation phase will consist of an in-depth review of the following:

- Compliance with SHIP regulations
- Project risk analysis
- Financial risk analysis
- Capacity and experience
- Project feasibility
- Adherence to SHIP eligibilities/requirements
- Past performance evaluation

h. **Additional Information:** N/A

G. Rental Rehabilitation	**Code 14**

a. **Summary:** The program is designed to rehabilitate rental units in Collier County. Loans will be given to non-profit/for-profit housing landlords/owners who have site control and/or ownership of the properties to rehabilitate existing single-family, multifamily, or mobile/manufactured rental units on scattered sites or a rental complex. Assistance may be provided for large projects involving the repair of multiple rental units.

b. **Fiscal Years Covered:** 2025-2026, 2026-2027, 2027-2028

c. **Income Categories to be served:** Very low, low, and moderate

d. **Maximum award:** $300,000-Single-Family -1 to 4 dwelling units, $75,000 per unit
$1,000,000-Multi-Family-5 or more dwelling units, $50,000 per unit

- 1-4 units assisted: 1 special needs, 1 Very Low-income person
- 5-10 units assisted: 2 special needs, 3 very low income and 2 low income
- 11-20 units assisted: 3 special needs, 4 very low, 3 low income
- 20 or more units assisted: 4 special needs, 6 very low income and 5 low income

e. **Terms:**

1. Repayment loan/deferred loan/grant: Funds will be made available by loans secured by a subordinate mortgage, promissory note, and a land use restriction agreement placed on the property being rehabilitated.
2. Interest Rate: 0%
3. Years in loan term: 30 years
4. Repayment: Monthly payments are not required.
5. Forgiveness: If all conditions of the loan are met, the loan is forgiven at the end of the 30th year.
6. Default: Loan default will be triggered by any of the following actions:
    i. Sale - if proceeds are not enough to pay off the mortgage note, then the property owner (not-

for-profit or for-profit or landlord) may contact the county regarding a settlement amount of the SHIP loan.

ii. Title transfer - either voluntary or by operation of law, divested of title by judicial sale, levy, or other proceedings, including foreclosure or Deed in Lieu.

iii. Refinance - a refinance of the first mortgage may be approved without repayment if the request is submitted in writing and the refinance is at a lower fixed rate and/or term with no cash-out.

iv. Change in use - Property no longer serves the intended population.

f. **Recapture:** Eligible Sponsors that offer rental housing for sale before the end of the 30-year term must give First Right of Refusal to other eligible nonprofit sponsors for purchase per Section 420.9075(5)(i) Florida Statutes.

g. **Tenant Selection Criteria:** Units receiving assistance must be reserved on a first-qualified, first-served basis for income-eligible residents. Sponsor will be required to assist the minimum number of special need, low and very low-income persons in accordance with the table below, however, the County reserves the right to request additional units.

Verification of US Citizenship, Permanent Residency Status or qualified non-citizens as aligned with FEMA. All borrowers must submit one of the following: U.S. Passport, U.S. Birth Certificate, U.S. naturalization document, permanent resident card or proof of immigration status.

h. **Sponsor Selection Criteria:** Non-profit/for-profit housing sponsors or landlords will be evaluated using established evaluation and selection criteria.

CHS staff will evaluate each application submitted. In the initial phase, staff will review the application for general conformance with the submission requirements. The evaluation phase will consist of an in-depth review of the following:

- Compliance with SHIP regulations
- Project risk analysis
- Financial risk analysis
- Capacity and experience
- Project feasibility
- Adherence to SHIP eligibilities/requirements
- Past performance evaluation

i. **Additional Information:** Once the improvements are completed, the sponsor/landlord shall ensure all eligible tenants who occupy the units on the subject property, will be income-qualified during the thirty (30) year loan term.

Individual tenants seeking repairs on their individual rental units may not directly apply for assistance from this strategy. The SHIP funds used in the rehabilitation rental program may be leveraged by public and private sources.

H. Rental Acquisition	**Code 20**

a. **Summary:** The program is designed to acquire rental units within Collier County. The sponsor must

purchase units in Collier County to create rental opportunities for very-low-, low-, -income tenants and Special Needs households as defined in 420.0004 (13).

b. **Fiscal Years Covered:** 2025-2026, 2026-2027, 2027-2028

c. **Income Categories to be served:** Very low-income, and low-income

d. **Maximum award:** $ 1,000,000 per property, as identified by the Collier County Property Appraiser.

- 1-4 units assisted: at a minimum 1 special needs, 1 Very Low-income person
- 5-10 units assisted: at a minimum 2 special needs, 3 very low income and 2 low income
- 11-20 units assisted: at a minimum 3 special needs, 4 very low, 3 low income
- 21 or more units assisted: at a minimum 4 special needs, 6 very low income and 5 low income

e. **Terms:**

1. Repayment loan/deferred loan/grant: Funds will be made available by loans secured by a subordinate mortgage, promissory note, and land use restriction agreement placed on the property acquired.
2. Interest Rate: 0%
3. Years in loan term: 30 years
4. Repayment: Monthly payments are not required.
5. Forgiveness: If all conditions of the loan are met, then the loan is forgiven after 30 years.
6. Default: Repayment of the loan is required in full under the following conditions:
   i. Sale: if proceeds are not enough to pay off the promissory note, then the property owner (non-profit or for-profit) may contact the County regarding a settlement amount of the SHIP loan.
   ii. Title transfer: either voluntarily or by operation of law, divested of title by judicial sale, levy, or other proceedings, including foreclosure or Deed in Lieu.
   iii. Refinance: a refinance of the first mortgage may be approved without repayment if the request is submitted in writing and the refinance is at a lower fixed rate and/or term, with no cash-out.
   iv. Property will no longer serve the intended target population.

f. **Recapture:** Eligible Sponsors that offer rental housing for sale before the end of the 30-year term must give First Right of Refusal to other eligible nonprofit sponsors for purchase per Section 420.9075(5)(i) Florida Statutes.

g. **Tenant Selection Criteria:** Tenants will be selected on a first-qualified, first-served basis. Sponsor will be required to assist the minimum number of special need, low and very low-income persons in accordance with the table below, however, the County reserves the right to request additional units.

Verification of US Citizenship, Permanent Residency Status or qualified non-citizens as aligned with FEMA. All borrowers must submit one of the following: U.S. Passport, U.S. Birth Certificate, U.S. naturalization document, permanent resident card or proof of immigration status.

h. **Sponsor Selection Criteria:** Non-profit/for-profit housing sponsors will be evaluated using established evaluation and selection criteria.

CHS staff will evaluate each application submitted. In the initial phase, staff will review the application for general conformance with the submission requirements. The evaluation phase will consist of an in-depth

review of the following:

- Compliance with SHIP regulations
- Project risk analysis
- Financial risk analysis
- Capacity and experience
- Project feasibility
- Adherence to SHIP eligibilities/requirements
- Past performance evaluation

i. **Additional Information:** Once the acquisition is completed, the sponsor shall ensure all eligible tenants who occupy the units on the subject property, will be income-qualified on an annual basis during the thirty (30) year loan term.

I. Rental Development	**Code 21**

a. **Summary:** Funds will be awarded to developers of affordable rental units for construction, impact fees, and land acquisition financing through other state or federal housing programs to construct affordable rental units in incorporated or unincorporated Collier County. This funding is intended to be used as gap financing required for the project. In cases where a smaller development (less than 50 units) is being proposed that includes Special Needs units, the County may choose to provide a larger amount of the overall financing.

b. **Fiscal Years Covered:** 2025-2026, 2026-2027, 2027-2028

c. **Income Categories to be served:** Very low, low, and moderate

d. **Maximum award:** The applicable dollar figure as determined annually by the Florida Housing Finance Corporation for match contribution per developer whose application is approved through the Florida Housing Finance Corporation for low-income housing tax credits.

1. $1,000,000 per development under 50 units, which includes at least two (2) special needs units, at least four (4) 50% AMI very low-income units and the remaining units at 80% AMI low-income units.

2. $1,500,000 per development with 50 units or less, which includes at least two (2) Special Needs units, at least five (5) 50% AMI very low-income units and the remaining units at 80% AMI low-income units

3. $2,000,000 per development with over 50 units, which includes at least three (3) Special Needs units, at least six (6) 50% AMI very-low-income units and the remaining units at 80% AMI low-income units.

e. **Terms:**

1. Repayment loan/deferred loan/grant:
   a. For-profit developers, funds will be awarded as a loan secured by a recorded subordinate mortgage, promissory note, and land use restriction agreement, against the property.
   b. Non-profit developers, funds will be awarded as a forgivable loan or grant secured by a recorded

subordinate mortgage, promissory note, and land use restriction agreement, against the property.

2. Interest Rate: 0%
3. Years in loan term: 30 years
4. Forgiveness:
   i. For for-profit developers, the loan is due and payable at the end of the term unless the County negotiates an extended loan term to secure affordable rental units in the best interest of the County's residents.
   ii. For Non-profit developers, one-third of the principal loan balance is forgiven every ten years through the thirty (30) year term.
5. Repayment: Monthly payments are not required.
6. Default: For all awards, the outstanding balance will be due and payable, and a default will be determined if any of the following occurs:
   i. Sale: if proceeds are not enough to pay off the promissory note then the property owner (not-for-profit or for-profit) may contact the county regarding a settlement amount of the SHIP loan.
   ii. Title transfer: either voluntary or by operation of law, divested of title by judicial sale, levy or other proceedings, including foreclosure or Deed in Lieu.
   iii. Refinance: a refinance of the first mortgage may be approved without repayment if the request is submitted in writing and the refinance is at a lower fixed rate and/or term with no cash-out.
   iv. Property will no longer serve the intended target population.

Repaid funds are considered program income, a portion of which may be used for program administration.

f. **Recapture:** Eligible Sponsors that offer rental housing for sale before the end of the 30-year term must give First Right of Refusal to other eligible nonprofit sponsors for purchase per Section 420.9075(5)(i) Florida Statutes.

g. **Tenant Selection Criteria:** All applicants for residence in a SHIP-assisted unit must meet the income qualifications of the program as determined and reported by the developer for the development and will be served on a first-qualified basis.

Verification of US Citizenship, Permanent Residency Status or qualified non-citizens as aligned with FEMA. All borrowers must submit one of the following: U.S. Passport, U.S. Birth Certificate, U.S. naturalization document, permanent resident card or proof of immigration status.

h. **Sponsor Selection Criteria:** Sponsors will apply to the County through an application or solicitation process. The application/solicitation will require proof of developer experience in providing affordable rental housing, proof of financial capacity, proof of ability to proceed once all funding is closed, and an approved housing unit design plan that meets with the County's housing element in the Comprehensive Plan.

The County reserves the right to select developments that have met all the above requirements and:

a. Are in areas of immediate need due to a lack of available units.
b. Propose to preserve and improve existing units.

All funding awards will be subject to closing on other funding sources.

i. **Additional Information:** Once the project is completed, the sponsor shall ensure all eligible tenants who

occupy the units on the subject property, will be income-qualified on an annual basis during the thirty (30) year loan term.

J. Land Trust Acquisition & Development	Code 9,10

a. **Summary:** Summary: Funds will be awarded to Community Land Trust (CLT) as a cost pay down reducing the base sales price for the construction of new homes or the acquisition of new and existing homes that are sited on land that is, or will be, owned by a CLT Assisted homes will be for sale to eligible first-time homebuyers. Funds may be used for acquisition (including land), soft costs, infrastructure and development costs, demolition, impact fees, construction, rehabilitation, financing, buydown, developer fees, and all other eligible acquisition and construction-related costs.

b. **Fiscal Years Covered:** 2025-2026, 2026-2027, 2027-2028 Update as needed

c. **Income Categories to be served:** Very low, Low

d. **Maximum award:** $$400,000: $250,000 for the purchase of existing single-family home or single-family home construction cost and $150,000 for land acquisition

e. **Terms:**
Sponsor Terms:

1. Repayment loan/deferred loan/grant: Funds will be awarded as deferred payment loans secured by recorded LURA, mortgages, and notes.
   - SHIP funds will be awarded as a deferred loan secured by a recorded mortgage and note for the acquisition, development, and other eligible costs related to the construction, acquisition, and improvements (home), not to include the underlying land, 100% shall be converted to a mortgage and retained as a permanent subsidy to the benefit of the eligible initial and subsequent buyer.

   - When applicable, SHIP funds will be awarded as a deferred loan secured by a recorded mortgage and note for the acquisition of the underlying land which will not be converted into a mortgage with the eligible buyer and will be considered a grant to the recipient to be retained as permanent subsidy for future buyers. The value of the land for award purposes shall be determined by the purchase price of the land and the number of units sited/constructed on the land.

2. **Interest Rate:** 0%

3. **Years in loan term:** 30 years

4. **Forgiveness:** If the loan(s) is in good standing upon the sale of the property to an eligible homebuyer, the County will satisfy the promissory note(s) and release any restrictive covenant(s) with the Sponsor/CLT.
5. **Repayment:** Not required if the loan is in good standing.

6. **Default:** The loan(s) will be in default if the Sponsor/CLT fails to construct and sell the assisted unit(s) to an eligible buyer and execute a ground lease within the contractual timeframe. The County will

recapture the subsidy and/or property if the housing has not been completed within the term of the recorded Mortgage Agreement(s).

Recipient Terms:

1. **Repayment loan/deferred loan/grant**: Funds will be awarded as a deferred payment loan secured by a recorded mortgage and note totaling SHIP cost associated with the acquisition, development, and other eligible costs related to the improvements (home), that is assumable or originates as new at resale by each subsequent income qualified purchaser with prior approval by the CLT. The security interest provided shall be solely on the home and improvements, not the underlying land.

2. **Interest Rate:** 0%

3. **Years in loan term:** 30 years Forgiveness: If the loan remains in good standing, assistance will be forgiven at the end of the loan term but will be retained as a permanent subsidy via the CLT ground lease which will survive the term of the loan and will address the requirements for residency, resale price, subsequent buyer's income eligibility as well as to assure that units served remain affordable in perpetuity.

4. **Repayment:** Monthly payments are not required.

5. **Default:** The loan will be determined to be in default if any of the following occurs during the Loan term: sale, transfer, or conveyance of property; conversion to rental property; or failure to occupy the home as primary residence. If any of these occur, the outstanding balance will be due and payable. Persons that qualify for SHIP assistance will be required to contractually agree to all SHIP program guidelines, County SHIP mortgage requirements, and repayment provisions, and certify that the unit assisted will be their primary residence.

In addition to the above, the loan may be determined to be in default if any of the following occurs:

ii. Sale: if proceeds are not enough to pay off the promissory note, then the homeowner may contact the County regarding a settlement amount of the SHIP loan that is outlined in the County's "Short Sale Policy".
    ii. Title transfer: either voluntary or by operation of law, divested of title by judicial sale, levy, or other proceedings, including foreclosure or Deed in Lieu.
    iii. Refinance: may be allowed in accordance with the published "Subordination Policy".
    iv. Home is no longer primary residence, abandoned, leased, or rented.

f. Recipient Selection Criteria:

- Applicants will be ranked for assistance based first on priorities established in part "I" of the first section of this plan and then on a first-qualified, first-served basis.
- CLT homebuyers must complete a homebuyer education class that contains a community land trust component and/or session with the CLT in addition to a homebuyer education class that requires CLT buyers to demonstrate and attest to a clear understanding of the terms of community land trust homeownership.
- First mortgage lender approval, if applicable.
- Verification of US Citizenship, Permanent Residency Status or qualified non-citizens as aligned with FEMA. All borrowers must submit one of the following: U.S. Passport, U.S. Birth Certificate, U.S. naturalization document, permanent resident card or proof of immigration status.

g. **Sponsor Selection Criteria:** Applications from potential sponsors/CLTs will be reviewed on an ongoing basis. The criteria to select sponsors may include, but is not limited to, the following:

- Community land trusts that meet the definition of a "community land trust" under section 193.018 of the Florida Statutes. Preference will be given to CLTs who have been certified or are in the process of certification by the Florida Community Land Trust Institute.
- Quantity and quality of experience in affordable housing development;
- Experience in developing and/or stewarding CLT homes for permanent affordability;
- Financial strength of the sponsor, including the ability to leverage funds from other sources;
- Ability of the sponsor to complete the project by deadlines established by the City/County; and
- Capacity of the sponsor; and
- Contract for sale/conveyance or site control.

h. **Additional Information:**

Subsidy for the acquisition, development, construction and rehabilitation of units, new or existing, will be awarded at the maximum amount to reduce the base price dollar-for-dollar for initial and subsequent homebuyers via the CLTs stewardship of the ground lease.

This type of assistance may first require that the CLT take ownership of the property (land & existing improvements) and sell the improvements and enter into a ground lease with the eligible buyer.

Please see Exhibit K for additional instructions and information for CLT purchases.

Section III. LHAP Incentive Strategies

In addition to the **required Incentive Strategy A and Strategy B**, include all adopted incentives with the policies and procedures used for implementation as provided in Section 420.9076, F.S.:

A. Expedited Permitting

Permits as defined in s. 163.3177 (6) (f) (3) for affordable housing projects are expedited to a greater degree than other projects.

Provide a description of the procedures used to implement this strategy: The Collier County Board of County Commissioners approved an AHAC recommended Incentive Strategy to expedite the development review process for qualified affordable workforce housing. Expedited Permitting, or Fast Track, was amended via Resolution 2018-40.

Initially, a qualification meeting is held with the developer/agent and Community and Human Services (CHS) staff to determine if the project meets the affordable housing requirements outlined in Res. 18-40. Those projects that demonstrate compliance are issued a certificate of affordable housing to allow the expedited review process for all aspects of the development. Planning and Zoning staff will provide expedited status by assisting these developments first throughout the process from application through Certificate of Occupancy.

B. Ongoing Review Process

An ongoing process for review of local policies, ordinances, regulations, and plan provisions that increase the cost of housing prior to their adoption.

Provide a description of the procedures used to implement this strategy: Collier County requires all items that have the potential to increase the cost of housing to be prepared and presented to the Collier County

Board of County Commissioners with the amount of the increase or decrease identified in the executive summary. The executive summary must be prepared in official County format and include a description of the Growth Management Impact and the Fiscal Impact.

The process, by which items are prepared for the BCC Agenda includes a vast approval hierarchy to ensure that all proposed actions impacting affordable housing are reviewed on an ongoing basis. Furthermore, the Collier County Affordable Housing Advisory Committee (AHAC) regularly forms subcommittees to review impediments to affordable housing, as well as new affordable housing incentives.

C. Other Incentive Strategies Adopted:

1. Increased Density for Affordable Housing – Collier County allows developers to request increased density when including a certain percentage of affordable housing in the proposed development.

   An Affordable Housing Density Bonus Agreement must be submitted and approved by the Collier County Board of County Commissioners as provided for in the Collier County Land Development Code, § 2.06.00. Improvements to the Affordable Housing Density Bonus (AHDB) program were approved via Ordinance 2019-02.

2. Inventory of Locally Owned Public Lands Suitable for Affordable Housing.

   Collier County prepares an inventory of all real property owned by Collier County that may be appropriate for use as affordable housing in accordance with Sec. 125.379 F.S. every three years.

   The Collier County Board of County Commissioners approved an AHAC recommended Incentive Strategy to permit properties identified as appropriate for use as affordable housing to be offered for sale and the proceeds used to purchase land for the development of affordable housing, or to increase the local government fund (Housing Trust Fund) earmarked for affordable housing, or may be sold with a restriction that requires the development of the property as permanent affordable housing, or may be donated to a nonprofit housing organization for the construction of permanent affordable housing.

IV. EXHIBITS:

A. Administrative Budget for each fiscal year covered in the Plan.

B. Timeline for Estimated Encumbrance and Expenditure.

C. Housing Delivery Goals Chart (HDGC) For Each Fiscal Year Covered in the plan.

D. Signed LHAP Certification.

E. Signed, dated, witnessed, or attested adopting resolution.

F. Ordinance: (If changed from the original creating ordinance)

G. Interlocal Agreement.

H. Short Sale Policy & Short Sale Application

I. Essential Personnel Certification.

J. Subordination Policy & Subordination Request Form.

K. CLT Acquisition & Development instructions and Information

EXHIBIT A

Collier County SHIP Budget

Fiscal Year 2025 - 2026		
Estimated SHIP Funds for Fiscal Year:	$	3,026,866.00
Salaries and Benefits	$	254,256.74
Office Supplies and Equipment	$	4,540.30
Travel Per diem Workshops, etc.	$	7,567.17
Advertising	$	3,026.87
Other	$	33,295.53
Total	$	302,686.60
Admin %		10%
Project FUNDS	$	2,724,179.40

Fiscal Year 2026 - 2027		
Estimated SHIP Funds for Fiscal Year:	$	3,178,209.00
Salaries and Benefits	$	266,969.56
Office Supplies and Equipment	$	4,767.31
Travel Per diem Workshops, etc.	$	7,945.52
Advertising	$	3,178.21
Other	$	34,960.30
Total	$	317,820.90
Admin %		10%
Project FUNDS	$	2,860,388.10

Fiscal Year 2027 - 2028		
Estimated SHIP Funds for Fiscal Year:	$	3,337,119.00
Salaries and Benefits	$	280,318.00
Office Supplies and Equipment	$	5,005.68

Travel Per diem Workshops, etc.	$	8,342.80
Advertising	$	3,337.12
Other	$	36,708.31
Total	$	333,711.90
Admin %		10%
Project FUNDS	$	3,003,407.10

EXHIBIT B

Timeline for SHIP Expenditures

Collier County Board of County Commissioners affirms that funds allocated for these fiscal years will meet the following deadlines:

Fiscal Year	Encumbered	Expended	Closeout Report
2025-2026	6/30/2027	6/30/2028	9/15/2028
2026-2027	6/30/2028	6/30/2029	9/15/2029
2027-2028	6/30/2029	6/30/2030	9/15/2030

If funds allocated for these fiscal years is not anticipated to meet expenditure deadlines, Florida Housing Finance Corporation should be notified according to the following dates:

Fiscal Year	Funds Not Expended	Closeout AR Not Submitted
2025-2026	3/30/2028	6/15/2028
2026-2027	3/30/2029	6/15/2029
2027-2028	3/30/2030	6/15/2030

Requests for Expenditure Extensions (close-out year ONLY) must be emailed to robert.dearduff@floridahousing.org and include:

1. A statement that "(city/county) requests an extension to the expenditure deadline for fiscal year _____.
2. The amount of funds that is not expended.
3. The amount of funds that is not encumbered or has been recaptured.
4. A detailed plan/timeline of how/when the money will be expended.

Note: an extension to the expenditure deadline (June 30) does not relieve the requirement to submit (September 15) the annual report online detailing all funds that have been expended.

Other Key Deadlines:

AHAC reports are now due annually by December 31. Local governments receiving the minimum (or less) allocation may choose not to report.

ACFR financial statements are due each June 30 for the report ending September 30 of the previous year.

FLORIDA HOUSING FINANCE CORPORATION												
HOUSING DELIVERY GOALS CHART												
2025-2026												
Name of Local Government:												
Estimated Funds (Anticipated allocation only):			$ 3,026,866									
Code	Strategies Homeownership	Qualifies for 75% set-aside	VLI Units	Max. SHIP Award	LI Units	Max. SHIP Award	Mod Units	Max. SHIP Award	New Construction	Without Construction	Total	Units
2	Purchase Assistance	Yes	1	$100,000	2	$80,000	1	$70,000	$330,000.00	$0.00	$330,000.00	4
3	Owner-Occupied Rehabilitation	Yes	3	$75,000	2	$75,000	1	$69,000	$444,000.00	$0.00	$444,000.00	6
6	Emergency Housing Repair & Housing Resilience	Yes	1	$100,000	1	$100,000	0	$0	$200,000.00	$0.00	$200,000.00	2
4	Demolition & Replacement of Manufactured Housing	Yes	1	$200,000	1	$200,000	0	$0	$400,000.00	$0.00	$400,000.00	2
5 & 16	Disaster Assistance	Yes	2	$30,000	2	$30,000	1	$30,000	$150,000.00	$0.00	$150,000.00	5
10	New Construction Assistance	Yes	3	$100,000	9	$100,000	0	$100,000	$1,200,000.00	$0.00	$1,200,000.00	12
9, 10	Community Land Trust Acquisition & Development	No	0	$400,000	0	$400,000	0	$400,000	$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
	Total Homeownership		11		17		3		$2,724,000.00	$0.00	$2,724,000.00	31
Purchase Price Limits:			New	$ 748,837	Existing	$ 748,837						
			OK		OK							
Code	Rental	Qualifies for 75% set-aside	VLI Units	Max. SHIP Award	LI Units	Max. SHIP Award	Mod Units	Max. SHIP Award	New Construction	Without Construction	Total	Units
14	Rental Rehabilitation	Yes	0	$300,000	0	$300,000	0	$300,000	$0.00	$0.00	$0.00	0
20	Rental Acquisition	No	0	$1,000,000	0	$1,000,000	0	$1,000,000	$0.00	$0.00	$0.00	0
21	Rental Development	Yes	0	$1,000,000	0	$1,000,000	0	$1,000,000	$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
	Total Rental		0		0		0		$0.00	$0.00	$0.00	0
	Administration Fees		$ 302,687		10%		OK					
	Home Ownership Counseling		$ -									
	Total All Funds		$ 3,026,687	OK								

Set-Asides				
Percentage Construction/Rehab (75% requirement)		90.0%		OK
Homeownership % (65% requirement)		90.0%		OK
Rental Restriction (25%)		0.0%		OK
Very-Low Income (30% requirement)		$ 985,000	32.5%	OK
Low Income (30% requirement)		$ 1,570,000	51.9%	OK
Moderate Income		$ 169,000	5.6%	

EXHIBIT C

FLORIDA HOUSING FINANCE CORPORATION

HOUSING DELIVERY GOALS CHART

2026-2027

Name of Local Government:

Estimated Funds (Anticipated allocation only): $ 3,178,209

Code	Strategies Homeownership	Qualifies for 75% set-aside	VLI Units	Max. SHIP Award	LI Units	Max. SHIP Award	Mod Units	Max. SHIP Award	New Construction	Without Construction	Total	Units
2	Purchase Assistance	Yes	1	$100,000	2	$80,000	1	$70,000	$330,000.00	$0.00	$330,000.00	4
3	Owner-Occupied Rehabilitation	Yes	3	$75,000	2	$75,000	1	$75,000	$450,000.00	$0.00	$450,000.00	6
6	Emergency Housing Repair & Housing Resilience	Yes	1	$30,000	0	$100,000	0	$0	$30,000.00	$0.00	$30,000.00	1
4	Demolition & Replacement of Manufactured Housing	Yes	0	$200,000	0	$200,000	0	$0	$0.00	$0.00	$0.00	0
5 & 16	Disaster Assistance	Yes	2	$30,000	2	$30,000	1	$30,000	$150,000.00	$0.00	$150,000.00	5
10	New Construction Assistance	Yes	3	$100,000	9	$100,000	0	$100,000	$1,200,000.00	$0.00	$1,200,000.00	12
9, 10	Community Land Trust Acquisition & Development	No	0	$400,000	0	$400,000	0	$400,000	$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
	Total Homeownership		10		15		3		$2,160,000.00	$0.00	$2,160,000.00	28
	Purchase Price Limits:		New	$ 748,837	Existing	$ 748,837						
			OK		OK							

Code	Rental	Qualifies for 75% set-aside	VLI Units	Max. SHIP Award	LI Units	Max. SHIP Award	Mod Units	Max. SHIP Award	New Construction	Without Construction	Total	Units
14	Rental Rehabilitation	Yes	0	$300,000	0	$300,000	0	$300,000	$0.00	$0.00	$0.00	0
20	Rental Acquisition	No	0	$1,000,000	0	$1,000,000	0	$1,000,000	$0.00	$0.00	$0.00	0
21	Rental Development	Yes	1	$700,000	0	$1,000,000	0	$1,000,000	$700,000.00	$0.00	$700,000.00	1
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
	Total Rental		1		0		0		$700,000.00	$0.00	$700,000.00	1
	Administration Fees		$	317,821	10%		OK					
	Home Ownership Counseling		$	-								
	Total All Funds		$	3,177,821	OK							

Set-Asides

Percentage Construction/Rehab (75% requirement)		90.0%	OK
Homeownership % (65% requirement)		68.0%	OK
Rental Restriction (25%)		22.0%	OK
Very-Low Income (30% requirement)	$1,415,000	44.5%	OK
Low Income (30% requirement)	$1,270,000	40.0%	OK
Moderate Income	$ 175,000	5.5%	

LHAP Exhibt C 2024

FLORIDA HOUSING FINANCE CORPORATION

HOUSING DELIVERY GOALS CHART

2027-2028

\

Estimated Funds (Anticipated allocation only):			$ 3,337,119									
Code	Strategies Homeownership	Qualifies for 75% set-aside	VLI Units	Max. SHIP Award	LI Units	Max. SHIP Award	Mod Units	Max. SHIP Award	New Construction	Without Construction	Total	Units
2	Purchase Assistance	Yes	2	$100,000	1	$80,000	1	$70,000	$350,000.00	$0.00	$350,000.00	4
3	Owner-Occupied Rehabilitation	Yes	3	$75,000	2	$75,000	1	$75,000	$450,000.00	$0.00	$450,000.00	6
6	Emergency Housing Repair & Housing Resilience	Yes	1	$13,000	1	$100,000	0	$0	$113,000.00	$0.00	$113,000.00	2
4	Demolition & Replacement of Manufactured Housing	Yes	0	$200,000	1	$200,000	0	$0	$200,000.00	$0.00	$200,000.00	1
5 & 16	Disaster Assistance	Yes	0	$30,000	2	$30,000	1	$30,000	$90,000.00	$0.00	$90,000.00	3
10	New Construction Assistance	Yes	3	$100,000	9	$100,000	0	$100,000	$1,200,000.00	$0.00	$1,200,000.00	12
9, 10	Community Land Trust Acquisition & Development	No	0	$400,000	0	$400,000	0	$400,000	$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
	Total Homeownership		9		16		3		$2,403,000.00	$0.00	$2,403,000.00	28
Purchase Price Limits:			New	$ 748,837	Existing	$ 748,837						
			OK		OK							

Code	Rental	Qualifies for 75% set-aside	VLI Units	Max. SHIP Award	LI Units	Max. SHIP Award	Mod Units	Max. SHIP Award	New Construction	Without Construction	Total	Units
14	Rental Rehabilitation	Yes	1	$300,000	1	$300,000	0	$300,000	$600,000.00	$0.00	$600,000.00	2
20	Rental Acquisition	No	0	$1,000,000	0	$1,000,000	0	$1,000,000	$0.00	$0.00	$0.00	0
21	Rental Development	Yes	0	$1,000,000	0	$1,000,000	0	$1,000,000	$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
									$0.00	$0.00	$0.00	0
	Total Rental		1		1		0		$600,000.00	$0.00	$600,000.00	2
	Administration Fees		$	333,712	10%			OK				
	Home Ownership Counseling		$	-								
	Total All Funds		$	3,336,712 OK								

Set-Asides				
Percentage Construction/Rehab (75% requirement)		90.0%		OK
Homeownership % (65% requirement)		72.0%		OK
Rental Restriction (25%)		18.0%		OK
Very-Low Income (30% requirement)		$ 1,038,000	31.1%	OK
Low Income (30% requirement)		$ 1,490,000	44.6%	OK
Moderate Income		$ 175,000	5.2%	

Exhibit D

CERTIFICATION TO
FLORIDA HOUSING FINANCE CORPORATION

Local Government or Interlocal Entity: COLLIER COUNTY/CITY OF NAPLES

Certifies that:

(1) The availability of SHIP funds will be advertised pursuant to program requirements in 420.907-420.9079, Florida Statutes.

(2) All SHIP funds will be expended in a manner which will ensure that there will be no discrimination on the basis of race, color, national origin, sex, handicap, familial status, or religion.

(3) A process to determine eligibility and for selection of recipients for funds has been developed.

(4) Recipients of funds will be required to contractually commit to program guidelines and loan terms.

(5) Florida Housing will be notified promptly if the local government /interlocal entity will be

unable to comply with any provision of the local housing assistance plan (LHAP).

(6) The LHAP provides a plan for the encumbrance of funds within twelve months of the end of the State fiscal year in which they are received and a plan for the expenditure of SHIP funds including allocation, program income and recaptured funds within 24 months following the end of the State fiscal year in which they are received.

(7) The LHAP conforms to the Local Government Comprehensive Plan, or that an amendment to the Local Government Comprehensive Plan will be initiated at the next available opportunity to insure conformance with the LHAP.

(8) Amendments to the approved LHAP shall be provided to the Florida Housing for review and/or approval within 21 days after adoption.

(9) The trust fund exists with a qualified depository for all SHIP funds as well as program income or recaptured funds.

(10) Amounts on deposit in the local housing assistance trust fund shall be invested as permitted by law.

(11) The local housing assistance trust fund shall be separately stated as a special revenue fund in the local governments audited financial statements (ACFR). An electronic copy of the ACFR or a

hyperlink shall be provided to Florida Housing by June 30 of the applicable year.

(12) Evidence of compliance with the Florida Single Audit Act, as referenced in Section 215.97, F.S. shall be provided to Florida Housing by June 30 of the applicable year.

(13) SHIP funds will not be pledged for debt service on bonds.

(14) Developers receiving assistance from both SHIP and the Low-Income Housing Tax

Credit (LIHTC) Program shall comply with the income, affordability and other LIHTC requirements, similarly, any units receiving assistance from other federal programs shall comply with all Federal and SHIP program requirements.

(15) Loans shall be provided for periods not exceeding 30 years, except for deferred payment

loans or loans that extend beyond 30 years which continue to serve eligible persons.

(16) Rental Units constructed or rehabilitated with SHIP funds shall be monitored for compliance with tenant income requirements and affordability requirements or as required in Section 420.9075 (3)(e). To the extent another governmental entity provides periodic monitoring and determination, a municipality, county or local housing financing authority may rely on such monitoring and determination of tenant eligibility.

(17) The LHAP meets the requirements of Section 420.907-9079 FS, and Rule Chapter 67-37 FAC.

(18) The provisions of Chapter 83-220, Laws of Florida have not been implemented (except for Miami-Dade County).

ATTEST:
CRYSTAL K. KINZEL, CLERK

_____
, Deputy Clerk

Date:_____
(SEAL)

AS TO COUNTY:
BOARD OF COUNTY COMMISSIONERS OF COLLIER COUNTY, FLORIDA

By: _____
CHRIS HALL, CHAIRMAN

Date: _____

Approved as to form and
legal sufficiency:

_____
Jeffrey A. Klatzkow
Collier County Attorney

EXHIBIT E

EXHIBIT F

RECEIVED
APR 22 2013
By AJ

ORDINANCE NO. 2013 - 27

AN ORDINANCE OF THE BOARD OF COUNTY COMMISSIONERS OF COLLIER COUNTY, FLORIDA, ESTABLISHING THE COLLIER COUNTY SHIP LOCAL HOUSING ASSISTANCE PROGRAM ORDINANCE; PROVIDING FOR TITLE AND CITATION; PROVIDING FOR DEFINITIONS; PROVIDING FOR ESTABLISHMENT OF THE LOCAL HOUSING ASSISTANCE PROGRAM; PROVIDING FOR ESTABLISHMENT OF A LOCAL HOUSING ASSISTANCE TRUST FUND; PROVIDING FOR DESIGNATION OF RESPONSIBILITY FOR IMPLEMENTATION; PROVIDING FOR ESTABLISHMENT OF AN AFFORDABLE HOUSING ADVISORY COMMITTEE; PROVIDING FOR REPEAL OF ORDINANCE NO. 93-19, AS AMENDED; PROVIDING FOR THE REPEAL OF ORDINANCE NO. 91-65, AS AMENDED; PROVIDING FOR INCLUSION IN THE CODE OF LAWS AND ORDINANCES; PROVIDING FOR CONFLICT AND SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

FILED
2013 APR 26 PM 3:05
SECRETARY OF STATE
TALLAHASSEE, FLORIDA

WHEREAS, in 1992, the Legislature of the State of Florida approved the Sadowski Affordable Housing Act creating the State Housing Initiatives Partnership ("SHIP") Program for the specific purpose of supporting and expanding the availability of affordable housing resources within the State; and

WHEREAS, the Collier County Board of County Commissioners (Board) adopted Ordinance No. 93-19 on April 13, 1993, creating a local housing assistance trust fund, establishing a local housing assistance program, designating responsibility for the program, and creating an Affordable Housing Advisory Committee; and

WHEREAS, on July 23, 1991, the Board of County Commissioners adopted Ordinance No. 91-65, establishing the Collier County Affordable Housing Commission (now known as the Affordable Housing Advisory Committee), which Ordinance was subsequently amended by Ordinance Nos. 04-77, 05-69, 08-17, and 09-50; and

WHEREAS, the Board has determined that it is in the best interest of the County to repeal Ordinance No. 93-19, as amended, and Ordinance No. 91-65, as amended, in order to adopt a single consolidated Ordinance to comply with the requirements set forth in *Florida Statutes, Sections 420.907- 420.9070* and Chapter 67-37, Florida Administrative Code.

NOW, THEREFORE, BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF COLLIER COUNTY, FLORIDA, that:

SECTION ONE: Title and Citation.

This Ordinance shall be known and cited as the "Collier County SHIP Local Housing Assistance Program Ordinance".

SECTION TWO: Definitions.

For the purposes of this Ordinance, the definitions contained in Florida Statutes, Chapter 420.9071 and Rule 67-37.002, Florida Administrative Code, as they may be amended or replaced from time to time, are adopted herein by reference.

SECTION THREE: Establishment of the Local Housing Assistance Program.

The Local Housing Assistance Program is hereby created and established to implement the requirements of *Florida Statutes, Section 420.907* and *Rule 67-37, Florida Administrative Code*, adopted herein by reference, as they may be amended or replaced from time to time.

The County shall implement the program within the unincorporated boundaries of Collier County and may enter into an interlocal agreement with municipalities. The strategies of the program will be set forth in the County's SHIP local housing assistance plan.

SECTION FOUR: Establishment of a Local Housing Assistance Trust Fund.

Pursuant to the requirements *Section 420.907 Florida Statutes*, the County hereby reaffirms establishment of a Local Housing Assistance Trust Fund within the official and fiscal accounting office of the County as originally established on April 13, 1993, by Ordinance No. 93-19. The County's local housing assistance trust fund shall be separately stated as a special revenue fund in the county's audited financial statements. Copies of such audited financial statements shall be forwarded to the Florida Housing Finance Agency.

All moneys received from the state pursuant to the State Housing Initiative Partnership (SHIP] Program and any other funds received or budgeted to provide funding for the Local Housing Assistance Program shall be deposited into the Collier County Local Housing Assistance Trust Fund.

SECTION FIVE: Designation of responsibility for implementation.

The Director of the County's Department of Housing, Human and Veterans Services shall be primarily responsible for implementation and administration of the local housing assistance program.

SECTION SIX: Establishment of an Affordable Housing Advisory Committee.

The Affordable Housing Advisory Committee is created and established in accordance with *Florida Statutes, Section 420.*9076 and County Ordinance No. 01-55, Standards for The Creation and Review of Boards. In the event of a conflict, the provisions of *Florida Statutes, Section 420.*9076 shall apply.

Duties of the advisory committee are provided in *Florida Statutes, Section 420.9076(2)(a) - (k)* adopted herein by reference, as they may be amended or replaced from time to time.

Appointments to the Affordable Housing Advisory Committee will be made in accordance with the membership requirements of *Florida Statutes, Section 420.9076*, including joint appointments to prepare a joint plan when a participating municipality enters into an interlocal agreement to administer its program.

The committee shall consist of eleven (11) members as required by *Florida Statutes 420.9076 (2)(a)-(k)*, appointed by Resolution of the Board of County Commissioners no later than March 2, prior to the year the Local Housing Assistance Plan is due. The term of service shall be for three (3) years or at the discretion of the Board. Terms may be extended for one additional three (3) year term.

Six (6) members shall constitute a quorum sufficient to permit the committee to take any formal action. However, if formal action is not taken, the committee may meet to hear presentations with less than a quorum in attendance, if the meeting is duly noticed.

A majority of concurring votes of the entire membership of the committee shall be necessary for a decision or recommendation by the committee.

The committee may elect a chairperson or presiding officer.

The committee members serving immediately prior to this Ordinance's adoption shall fulfill the remainder of their appointed terms.

The committee shall meet at least triennially and submit a report to the local governing body that includes recommendations on, and triennially thereafter evaluates the implementation of, affordable housing incentives as required by *Florida Statutes, Section 420.9076(4)(a) - (k).*

The Board of County Commissioners may sunset or suspend meetings of the committee upon submission of the triennial Incentive Report and reconvene no later than March 2 of the year the Incentive Report is due. The committee will be cooperatively staffed by Housing, Human and Veterans Services Department and Planning and Zoning Department staff in accordance with *Florida Statutes, Section 420.9076(9).*

SECTION SEVEN: Repeal of Ordinance No. 93-19, as amended.

Ordinance No. 93-19, pertaining to the Collier County Housing Initiatives Partnership Program, and all amendments thereto, is hereby repealed in its entirety.

SECTION EIGHT: Repeal of Ordinance No. 91-65, as amended.

Ordinance No. 91-65, pertaining to the Affordable Housing Committee, and all amendments thereto, is hereby repealed in its entirety.

SECTION NINE: Inclusion in the Code of Laws and Ordinances.

The provisions of this Ordinance shall become and be made a part of the Code of Ordinances of Collier County, Florida. The sections of this Ordinance may be renumbered or re-lettered to accomplish such, and that the word "ordinance" may be changed to "section," "article," or other appropriate word or phrase necessary to accomplish such intentions.

SECTION TEN: Conflict and Severability.

In the event this Ordinance conflicts with any other Ordinance of Collier County or other applicable law, deemed a separate, distinct and independent provision and such holding shall not affect the validity of the remaining portion.

SECTION ELEVEN: Effective date.

This Ordinance shall become effective thirty (30) days after its adoption by the Board of County Commissioners.

PASSED AND DULY ADOPTED by the Board of County Commissioners of Collier County, Florida, this 9th day of April, 2013.

ATTEST:
DWIGHT E. BROCK, CLERK

By: _____ Deputy Clerk

Attest as to Chairman's signature only.

Approved as to form
and legal sufficiency:

_____
Jennifer B. White
Assistant County Attorney

JBW 3/5/13

BOARD OF COUNTY COMMISSIONERS
COLLIER COUNTY, FLORIDA

By: _____
Georgia A. Hiller, Esq.
Chairwoman

This ordinance filed with the Secretary of State's Office the 10th day of April, 2013 and acknowledgement of that filing received this 10th day of April 2013.

By _____ Deputy Clerk

EXHIBIT G

COLLIER COUNTY/CITY OF NAPLES

INTERLOCAL AGREEMENT

STATE HOUSING INITIATIVES PARTNERSHIP PROGRAM

THIS INTERLOCAL AGREEMENT (the "Agreement") made and entered into this day of _____, 2025, by and between Collier County, a political subdivision of the State of Florida, acting by and through its Board of County Commissioners, and the City of Naples, a municipal corporation created and existing under the laws of the State of Florida, acting by and through its City Council.

W I T N E S S E T H:

WHEREAS, Section 420.9072, et seq., Florida *Statutes* (the "State Housing Initiatives Partnership Program" ("SHIP"), authorizes monies in the Local Government Housing Trust Fund (the "Fund") to be distributed to approved counties and eligible municipalities within the county pursuant to an Interlocal Agreement; and

WHEREAS, Collier County is an approved county and the City of Naples is an eligible municipality within Collier County; and

WHEREAS, the parties desire to jointly utilize SHIP allocations pursuant to this Agreement; and

WHEREAS, the parties have determined that SHIP funds can be more efficiently utilized and managed when the parties work cooperatively to address the community's affordable housing needs.

NOW, THEREFORE, in consideration of the mutual promises set forth herein, the parties agree as follows:

1. The County and City do hereby agree that the SHIP Program funds as allocated in Section 420.9073, Florida Statutes, are to be distributed to Collier County to administer in conformity with the mutually approved Local Housing Assistance Plan.

2. Unless earlier terminated pursuant to other provisions of this Interlocal Agreement, the term of this Agreement shall run concurrent with the three-year Local Housing Assistance Plan (the "LHAP") which expires June 30, 2028 and will be automatically renewed with adoption of subsequent LHAPs.

3. The County and City direct the Florida Housing Finance Corporation (the "Corporation") to distribute and allocate the SHIP Program funds in accordance with this Agreement and authorize the Corporation to rely on their stated intent and their authority to execute this Agreement.

4. The SHIP Program funds so distributed will be deposited in a single depository trust fund account created and managed by Collier County, Finance Division of the Office of the Clerk of the Circuit Court. This account shall be known as the Collier County Local Housing Trust Fund (hereinafter referred to as "Local Fund"), to which SHIP funds are distributed by the Corporation. The Corporation will be notified of any change in the Local Fund status and the parties agree to have such Local Fund audited annually as required by Chapter 420, Florida Statutes and Chapter 67-37, Florida Administrative Code. Since all distributions from the Local Fund shall be processed by Collier County, parties hereto agree that the Comprehensive Single Entity Audit of the accounts and records of the County with respect to SHIP revenues and expenditures shall constitute the audit for the Interlocal Entity as described in the SHIP Regulations. The parties hereto agree that the Local Fund may be allocated a pro-rata cost of the independent audit by the County.

5. During the term of this Agreement, both parties agree that they will not do anything to jeopardize the other party's right to receive its allocation from the Local Fund.

6. Membership to the Affordable Housing Advisory Committee shall be jointly appointed by Resolution of both the County and City to triennially prepare a joint Local Housing Incentive Plan as required by Chapter 420.9076, Florida Statues.

7. The parties to this Agreement have adopted incentives from the Affordable Housing Incentive Plan as prepared and submitted by the joint Affordable Housing Advisory Committee, amending the Local Housing Assistance Plan accordingly. Both parties understand that Chapter 420, Florida Statutes requires continuing monitoring and implementation of the Affordable Housing Incentive Plan for the purpose of enhancing and providing affordable housing and agree to cooperate in ensuring that the requirements and spirit of the Chapter 420, Florida Statutes is satisfied.

8. Neither party shall use any revenues distributed and allocated for purposes other than those authorized by Section 420.907 et seq., Florida Statutes, or Chapter 67-37, Florida Administrative Code.

9. During the term of this Agreement, any party may give the other party ninety (90) days written notice that it wishes to renegotiate the terms of this Agreement, to be effective on the first day of the next fiscal year. If the parties fail to reach a new agreement prior to the commencement of the next fiscal year, this Agreement shall terminate and be of no further force or effect, and the funds shall be allocated according to population pursuant to Section 420.9072 and Section 420.9073, Florida Statutes.

10. If either party shall cease to be eligible for allocation and distribution, such party's allocation of the funds shall remain in the Local Fund to be used by the Corporation. Both parties acknowledge the SHIP enabling legislation, the rules promulgated to implement same, and that the Chapter 420, Florida Statutes and Chapter 67-37, Florida Administrative Code are incorporated herein as if they were restated.

IN WITNESS THEREOF, the parties hereto have caused this Agreement to be executed by their duly authorized officials.

ATTEST:
CRYSTAL K. KINZEL, CLERK

_____
, Deputy Clerk

BOARD OF COUNTY COMMISSIONERS
OF COLLIER COUNTY, FLORIDA

By: _____
BURT L. SAUNDERS, CHAIRPERSON

Approved as to form and
legal sufficiency:

_____
Jeffrey A. Klatzkow
Collier County Attorney

ATTEST:

_____
, City Clerk

CITY OF NAPLES, a Municipal Corporation

By: _____
Teresa Heitmann, Mayor

Approved as to form and
legal sufficiency:

_____
, City Attorney

EXHIBIT H

Collier County
Community and Human Services Division
State Housing Initiatives Partnership Program

SHORT SALE POLICY

Requests for short sale must be approved in advance and in writing by Collier County Community and Human Services Division. The following minimum criteria shall apply:

1. The recipient, as seller of the property, shall not receive any funds from the Short Sale transaction.

2. To facilitate a Short Sale, Collier County shall forgive 70 percent (70%) of the assistance provided based upon the following table.

PROPOSED SHORT SALE SETTLEMENT AMOUNT
30% of SHIP Second Mortgage face value amount

3. The Collier County Short Sale amount cannot conflict with the primary mortgage lender Short Sale Agreement.
   - If the primary lender rejects the SHIP Proposed Short Sale Settlement amount, at the discretion of the CHS Director or his/her designated representative, the settlement amount may be reduced as appropriate to help facilitate the sale of the property to avoid the possibility of foreclosure.

In order to determine if a recipient may qualify for Short Sale, the Division will require the following information:

1. Short Sale Request Form from owner or authorized agent.
2. Evidence of the first mortgage lender's approval for Short Sale.
3. Copy of signed sales contract or buyer offer sheet.

Following initial review, the Division will advise in writing if the recipient has been pre-approved for Short Sale. However, the following documents will be required prior to closing of the Short Sale and issuance of final approval:

1. Final unsigned Closing Disclosure as prepared for settlement (signed copy to be obtained immediately after settlement); and
2. Final first mortgage lender Short Sale approval; and
3. Final signed sales contract; and
4. Name, phone number and email address of closing agent.

Please allow 20 business days for processing from the date the request is submitted to our office. If approved, the Division will forward the Short Sale Agreement and/or payoff letter to the title company. If we are unable to approve the request, a denial letter will be issued.

EMAIL THE SHORT SALE REQUEST FORM ALONG WITH SUPPORTING DOCUMENTS TO:

CollierCountySHIP@colliercountyfl.gov
Collier County
Community and Human Services Division
State Housing Initiatives Partnership Program

SHORT SALE APPLICATION

Recipient(s) name: _____

Property address: _____

_____

First Mortgage Information

First Mortgage Lender: _____

Principal Balance:_____

Approved Short Sale Amount:_____

Net Proceeds to Recipient:_____

SHIP Second Mortgage Information

SHIP Mortgage Amount:_____

SHIP File Number:_____

Date Recorded: _____

Required Repayment Amount:_____

Amount Paid by Lender:_____

Amount Paid by Other: _____

Net Proceeds to Recipient:_____

OFFICE USE ONLY

☐ PRE-APPROVED
☐ DENIED

_____ _____
CHS Director Date

EXHIBIT I

ESSENTIAL PERSONNEL CERTIFICATION

Collier County Purchase Assistance Program recipients must have evidence of employment status in a specific field before they may be approved for additional funding in the program. Please certify which category the below named person's employment falls under.

Employee Name:	
Position Title:	

I certify that to the best of my knowledge the above-named applicant is a;

☐ Healthcare Personnel ☐ Skilled Building Trade Personnel ☐ Police and Fire Personnel

☐ Teacher and Educators, other school district, community college, university employees

☐ Local Government Employees

Healthcare Personnel and Government Employees
Health care personnel (HCP) are persons who have special education on health care and who are directly related to provision of health care services. HCP includes all paid and unpaid persons working in health-care settings. Physicians, nurses, nursing assistants, therapists, technicians, emergency medical service personnel, dental personnel, pharmacists, laboratory personnel, autopsy personnel who are employed with health-care facility will fall under HCP category.

Teacher and Educators, other school district, community college, university employees
A teacher or educator, employed by a county/city school district, private or public college/university or technical school/institute.

Skilled Building Trade Personnel
Common skilled trade careers include machinist, tool designer, fabricator, production technician, carpenter, mason, plumber, pipefitter, steamfitter, electrician, painter, HVAC and roofer.

Police, Emergency and Fire Personnel
An employee of a local law enforcement agency who is an officer sworn to carry out law enforcement duties. Examples of this class are sheriffs, deputy sheriffs, chiefs of police, city police officers, and sworn personnel of law enforcement subunits of port and transit authorities. This class includes campus police officers employed by of local city and community college districts. Private campus police are excluded. A firefighter or fire personnel who are extensively trained in firefighting. In addition those individuals also trained in Emergency Medical Services (EMS) and operate ambulances who may or may not in addition to being a firefighter.

Local Government Employees
An employee of Federal, State or Local Government is responsible for protecting the public's health and safety during emergencies. As such, all regular full and part-time employees are considered essential personnel and are expected to participate as assigned during and/or after a declared emergency and/or activation event, which will fall into one of the following categories: Department/Division Protective Measures, Shelter Operations, Emergency Support Function/Emergency Operations Center, Phone Bank/Hotline, Damage Assessment, Other: (Childcare, Volunteer Coordinator, Point of Distribution Assistant, etc. to be initiated by Emergency Management or their Division Director)
Employer Name:
Representative Name:
Signature:

EXHIBIT J

Collier County
Community and Human Services Department

SUBORDINATION POLICY

Requests for subordination must be approved in advance by the Community and Human Services Division ("Division"). We may consider subordinating our loan if the following factors are present:

- If the proposed transaction is a rate and term refinance (less than $500.00 to the borrower at closing), the new interest rate must be at least one percent less than the current interest rate; or any combination of Interest Rate reduction plus Mortgage Insurance reduction that would be the equivalent of a one percent interest rate reduction; and
- The new principal and interest payment is lower than the current total payment(s) as evidenced by the Loan Application or Loan Estimate; or if the new monthly payment is increased due to a reduction to the term of the loan, the Division will determine if the new payment is reasonable and beneficial to the client; and
- The proposed transaction may include the current first mortgage plus other purchase-related grants and/or financing (i.e., USDA Subsidy, etc.) OR
- Cash-out transactions are allowed, provided the Combined Loan-To-Value (CLTV) ratio of mortgages plus County liens does not exceed 80% of the current appraised value for the subject property. In this instance, the one percent reduction in interest rate may be waived if the transaction is beneficial to the client as determined by the Division; and
- Closing costs are reasonable as determined by the Division; and
- The proposed transaction does not include a prepayment penalty.
- Property being refinanced must be the borrower's principal residence.

The following documents must be submitted to our office to process a subordination request:

4. Subordination Request form (attached).
5. Signed and executed Loan Estimate or equivalent; and
6. Signed and executed mortgage/loan application; and
7. Preliminary Closing Disclosure or equivalent; and
8. Copy of title commitment
9. Copy of Appraisal (if applicable)

Please allow 20 business days for processing from the date the request is submitted to our office. If approved, the Division will notify the lender and title company to prepare the Subordination Agreement. If we are unable to approve the request, a payoff letter will be issued.

EMAIL THE SUBORDINATION REQUEST FORM ALONG WITH DOCUMENTS 2-6 TO:
For additional questions contact:
Lisa Carr, Supervisor-Grants
Phone: 239-252-2509
Email: lisa.carr@colliercountyfl.gov
ColliercountySHIP@colliercountyfl.gov

Subordination Request Form

To be completed by the Financial Institution processing refinance on behalf of clients listed below

Borrower (s) name: _____

Borrower (s) address: _____

Financial Institution: _____

Address: _____

Email: _____Phone: _____

Current Mortgage Information

Principal Balance: _____ Interest Rate: _____
Monthly Payment (PITI): _____ Loan Term: _____

New Mortgage Information

Loan Amount: _____ Interest Rate: _____

Monthly Payment (PITI): _____ Loan Term: _____

Closing Agent/Title Company Information

Name: _____ Contact Person: _____

Phone: _____ Email Address: _____

I certify that the above information is correct. I certify that there will be no cash out to the borrower, and no other unsecured debt will be paid off (i.e., credit cards, automobile loans, etc.). I understand that the subordination document prepared by Collier County will be invalid if that is the case.

_____ _____ _____
Lender/Broker Signature Lender/ Broker Name Printed Date

_____ _____
Email address Phone

EXHIBIT K

Additional Instructions and Information for Assistance for Community Land Trust Homes

To qualify, homes must be acquired/developed by a city/county-approved community land trust (CLT) that meets the definition of a "community land trust" under section 193.018 of the Florida Statutes. The CLT will execute a 99-year ground lease with the homebuyer. A memorandum of that ground lease is recorded in the public records immediately following the deed. The terms of the ground lease restrict the resale of the property to an income-eligible household and provide a right of repurchase to the CLT in the event of default. The CLT must approve the subsequent homebuyer. In the event of a default, the CLT must notify the City/County whether it intends to exercise its right of repurchase. In the event the CLT is not willing or able to exercise its right of repurchase, it shall transfer its right of repurchase to City/County, giving City/County the right, but not the obligation, to purchase the property.

Development assistance shall be treated as a cost pay-down to further reduce the sales price to the homebuyer. The assistance amount on a CLT home shall be separated from the Base Price and Formula Price as defined in the ground lease. The balance of the assistance must be included in the Purchase Option Price as defined in the ground lease to repay the funds to the City/County in the event of default. At the end of the loan term, the loan will be forgiven, and the lien released. However, the CLT ground lease will remain in effect and the subsidy as well as the requirements for residency, resale price, and subsequent buyer's income eligibility will continue. The CLT may request satisfaction of a loan and release of the lien during the term of the loan on behalf of a homeowner or seller, and under certain defined circumstances, with approval granted by the City/County on a case-by-case basis.

When selling a CLT home, the seller must notify the CLT. The CLT will then enter into a purchase and sale agreement with the seller, that will get assigned to the subsequent homebuyer who will execute an [Assumption Agreement or new loan with identical terms and/or ground lease]. The Purchase Option Price for the CLT will be calculated as follows:

Purchase Option Price = Formula Price + Payoff Amount of Deferred Payment Loans

Until the recipient loan is forgiven, the Formula Price is calculated using a Base Price calculated by subtracting the amount of SHIP assistance from the purchase price. The assistance on the improvements is included to lower purchase price. For example:

Purchase Price: $335,000
MINUS Assistance Provided as buy down (maximum): $100,000
EQUALS Base Price (sales price) for first buyer: **$235,000**

The base price is the amount the buyer would need to finance (plus transaction costs) and is used to calculate the Formula Price in the ground lease.

Suppose the Formula (re-sale) Price in the ground lease is calculated by a 1% annual increase to the Base Price, compounded. Suppose the home is sold after 5 years. To calculate the Purchase Option Price (price that will go in the purchase and sale agreement between the CLT and the seller), first calculate the Formula Price:

Formula Price = Base Price x Compound Rate

Calculated as follows:

Year 1 = $235,000 x 1.01 = $237,350
Year 2 = $237,350 x 1.01 = $239,723.50

Year 3 = $239,723.50 x 1.01 = $242,120.74
Year 4 = $242,120.74 x 1.01 = $244,541.95
Year 5 = $244,541.95 x 1.01 = $246,987.37

Formula Price = $246,987

Purchase Option Price = $246,987 + $100,000 = $346,987

The price to the subsequent buyer equals the Purchase Option price minus any down payment assistance (development assistance already included in the lower initial purchase price):

Purchase Option Price:	$346,987.37
DPA assumed:	- $100,000
Sales price for subsequent buyer:	$246,987.37 (New Base Price for Formula Price)

The new price should be affordable to the subsequent buyer without additional subsidy.

At the end of the loan term, the value of the Purchase Option Price will be equal to the Formula Price; however, funds will remain as a direct subsidy of the unit via the CLT and its administration of a ground lease.

Collier County Strategic Plan

WORKFORCE HOUSING LAND TRUST FUND

District #3	3
Project #	50267
Project Manager	Cormac Giblin, Director Economic Development & Housing
Project Sponsor	Real Property GMCD – Housing Policy & Economic Development Division

Scope:

- Purchase land that can be reserved for housing that is affordable through extended County ownership.
- Acquire land for housing that is affordable
- Long term affordability of Collier's housing stock
- Promote economic development by increasing affordable housing options for the area's workforce

Total Budget	$20,000,000.00

Stage	% Complete
Procurement	72%
Design	50%
Construction	0%
Closeout	0%



Next Steps/Current Challenges **Updated: 02/28/25**

- Staff is currently accepting and reviewing applications for properties for acquisition.
- Shortage of available and appropriate parcels and development partners.
- End of dedicated funding source with expiration of Workforce Housing Land Acquisition Surtax Funding on December 31, 2023.
- Directed by BCC to purchase the Williams property in Immokalee funded in part by $5,950,000 in Surtax dollars.

Progress

- First acquisition validated by the Surtax Infrastructure Committee on January 11, 2024 (**Ekos Collier)** of $3,750,000.
  - Current Status: SDP approved, building permits under review.
- Second acquisition validated by Surtax Infrastructure Committee on March 14, 2024 (**Golden Gate Golf Course**) of $4,605,900.
  - Current Status: SDP Approved, building permits approved, site-work and vertical construction underway.
- Third acquisition validated by Surtax Committee on Sept 12, 2024 (**Williams Property**) of $5,950,000.
  - Current Status: Due diligence proceeding prior to acquisition.

- A total of $14,305,900 of the available $20M in surtax funding has been validated by the Infrastructure Surtax Committee, leaving $5,694,100 left to allocate.
- 6 Workforce Housing Land Acquisition applications have been received thus far exceed the total available funding.

A bill to be entitled

An act relating to housing; amending s. 196.1978, F.S.; providing and revising definitions; revising eligibility requirements for a specified affordable housing tax exemption; authorizing certain adaptive reuse projects to be eligible for a certain tax exemption; revising the period of time to determine eligibility for such exemption; providing that certain property owners continue to be eligible for such exemption if certain conditions are met; authorizing subsequent property owners to continue receiving such exemption; providing requirements for receiving a certification notice; authorizing specified actions by foreclosed property owners; requiring property appraisers to issue certain letters; providing that projects that have received such letters may continue receiving a specified tax exemption and may begin receiving such exemption on a specified date; revising requirements for taxing authorities; prohibiting such authorities from using specified emergency enactment procedures for specified purposes; requiring certain projects and developments to continue to be exempt from specified ordinances and resolutions; authorizing certain projects a cause of action to recover specified relief; revising penalties that must be

included in a certain land use restriction; providing applicability; amending s. 196.1979, F.S.; providing a definition for the term "adaptive reuse project"; revising eligibility requirements for a specified tax exemption; authorizing certain developments to abate certain future ad valorem property taxes by paying a specified amount at the time a building permit is issued; requiring the Florida Housing Finance Corporation to adopt certain rules; amending s. 212.055, F.S.; revising the types of expenditures for which the proceeds of a specified surtax may be used; amending s. 213.053, F.S.; authorizing the Department of Revenue to share certain information with specified parties; amending s. 220.02, F.S.; revising the order in which credits against specified taxes may be taken; amending s. 220.13, F.S.; revising adjustments for adjusted federal income; amending s. 220.197, F.S.; providing a short title; providing definitions; authorizing a tax credit for qualified expenses incurred for a specified purpose beginning on a certain date; providing applicability; prohibiting a taxpayer from receiving more than a specified amount in tax credits for a single project; providing eligibility requirements for such tax credit; authorizing forfeiture of such tax credit under

certain circumstances; authorizing the carryforward of such tax credit; authorizing the sale or transfer of such tax credit under certain conditions; authorizing the department to conduct audits; authorizing the Division of Historical Resources of the Department of State to assist in such audits; authorizing forfeiture of certain tax credits under certain circumstances; requiring repayment of certain funds into a specified account; requiring the filing of an amended revenue in specified circumstances; authorizing the department to issue a notice of deficiency in certain circumstances; providing applicability; requiring the department to submit a certain annual report; providing reporting requirements; providing department duties in administering a specified tax credit program; authorizing the Department of Revenue, the Division of Historical Resources, and the Florida Housing Finance Corporation to adopt rules; amending s. 420.503, F.S.; revising the definition of the term "qualified contract"; amending s. 420.50871, F.S.; revising the types of affordable housing projects funded by the Florida Housing Finance Corporation; prohibiting the corporation from requiring certain projects to use specified tax credits or financing; amending s. 420.50872, F.S.; prohibiting projects financed through

the Live Local Program from being required to use specified tax credits or financing; amending s. 624.509, F.S.; revising the order of credits and deductions taken against a specified tax; providing applicability; providing an effective date.

Be It Enacted by the Legislature of the State of Florida:

Section 1. Subsections (1) through (4) of section 196.1978, Florida Statutes, are renumbered as subsections (2) through (5), respectively, paragraphs (n) and (o) of present subsection (3) are redesignated as paragraphs (o) and (p), respectively, present subsection (1), paragraphs (b) and (d) of present subsection (2), paragraphs (a), (b), (d), (e), and (f) and present paragraph (o) of present subsection (3), and paragraphs (b), (d), and (f) of present subsection (4) are amended, a new paragraph (n) is added to present subsection (3), and a new subsection (1) and subsection (6) are added to that section, to read:

196.1978 Affordable housing property exemption.—

(1) As used in this section, the term:

(a) "Financial beneficiary" means any principal of the developer or applicant entity that receives or will receive any direct or indirect financial benefit from a development. A financial beneficiary does not include third-party lenders,

third-party management agents or companies, third-party service providers, housing credit syndicators, or credit enhancers regulated by a state or federal agency.

(b) "Multifamily project" includes all parcels or properties which have one or more of the same financial beneficiaries, submitted together for a single exemption under this section, for which any of the following conditions are met:

1. Any part of any of the property site is contiguous with any part of any of the other property sites;

2. Any of the property sites are divided only by a street or easement; or

3. It is readily apparent from the applications, proximity, chain of title, or other information made available to the Florida Housing Finance Corporation or property appraiser that the properties are part of a common or related scheme of development.

(2)(a) ~~(1)(a)~~ Property used to provide affordable housing to eligible persons as defined by s. 159.603 and natural persons or families meeting the extremely-low-income, very-low-income, low-income, or moderate-income limits specified in s. 420.0004, which is owned entirely by a governmental entity or nonprofit entity that is a corporation not for profit, qualified as charitable under s. 501(c)(3) of the Internal Revenue Code and in compliance with Rev. Proc. 96-32, 1996-1 C.B. 717, is considered property owned by an exempt entity and used for a

charitable purpose, and those portions of the affordable housing property that provide housing to natural persons or families classified as extremely low income, very low income, low income, or moderate income under s. 420.0004 are exempt from ad valorem taxation to the extent authorized under s. 196.196. All property identified in this subsection must comply with the criteria provided under s. 196.195 for determining exempt status and applied by property appraisers on an annual basis. The Legislature intends that any property owned by a limited liability company which is disregarded as an entity for federal income tax purposes pursuant to Treasury Regulation 301.7701-3(b)(1)(ii) be treated as owned by its sole member. If the sole member of the limited liability company that owns the property is also a limited liability company that is disregarded as an entity for federal income tax purposes pursuant to Treasury Regulation 301.7701-3(b)(1)(ii), the Legislature intends that the property be treated as owned by the sole member of the limited liability company that owns the limited liability company that owns the property. Units that are vacant and units that are occupied by natural persons or families whose income no longer meets the income limits of this subsection, but whose income met those income limits at the time they became tenants, shall be treated as portions of the affordable housing property exempt under this subsection if a recorded land use restriction agreement in favor of the Florida Housing Finance Corporation, a

housing finance authority as defined in s. 159.603(3), or any other governmental or quasi-governmental jurisdiction requires that all residential units within the property be used in a manner that qualifies for the exemption under this subsection and if the units are being offered for rent.

(b) Property ~~Land~~ that is owned entirely by a governmental entity or a nonprofit entity that is a corporation not for profit, qualified as charitable under s. 501(c)(3) of the Internal Revenue Code and in compliance with Rev. Proc. 96-32, 1996-1 C.B. 717, and is leased for a minimum of 90 ~~99~~ years for the purpose of, and is predominantly used for, providing housing to natural persons or families meeting the extremely-low-income, very-low-income, low-income, or moderate-income limits specified in s. 420.0004 is exempt from ad valorem taxation. For purposes of this paragraph, property ~~land~~ is predominantly used for qualifying purposes if the square footage of the improvements on the land used to provide qualifying housing is greater than 50 percent of the square footage of all improvements on the land. All improvements used to provide qualifying housing on the exempt property are also exempt from such taxation. This paragraph first applies to the 2024 tax roll and is repealed December 31, 2059.

(3) ~~(2)~~

(b) The multifamily project must:

1. Contain at least one unit that is ~~more than 70 units~~

~~that are~~ used to, or, for an adaptive reuse project as defined in s. 196.1979(1), at least 20 percent of the project's residential units must be used to, provide affordable housing to natural persons or families meeting the extremely-low-income, very-low-income, or low-income limits specified in s. 420.0004; and

2. Be subject to an agreement with the Florida Housing Finance Corporation, or a housing finance authority as defined in s. 159.603(3), recorded in the official records of the county in which the property is located to provide affordable housing to natural persons or families meeting the extremely-low-income, very-low-income, or low-income limits specified in s. 420.0004.

This exemption terminates if the property no longer serves extremely-low-income, very-low-income, or low-income persons pursuant to the recorded agreement.

(d) The property appraiser shall apply the exemption to those portions of the affordable housing property that are dedicated to providing ~~provide~~ housing to natural persons or families meeting the extremely-low-income, very-low-income, or low-income limits specified in s. 420.0004 before certifying the tax roll to the tax collector.

(4)(a) ~~(3)(a)~~ As used in this subsection, the term:

1. "Corporation" means the Florida Housing Finance Corporation.

2. "Improvement to real property" includes new construction, substantial rehabilitation of an existing multifamily project, or conversion from another use to multifamily.

3.~~2.~~ "Newly constructed" means an improvement, or the substantial rehabilitation of an existing improvement, to real property which was substantially completed within 5 years before the date of the property owner's ~~an applicant's~~ first submission of a request for a certification notice pursuant to this subsection.

4. "Substantial rehabilitation" means the meaningful repair or restoration of a property when the total value of such meaningful repair or restoration is equal to the greater of $15,000 per unit or $750 per unit, per year of building age, which is the difference between the year in which the property received the certificate of occupancy and the year in which the property first received the certification notice. Meaningful repairs or restorations may be reasonably allocated among in-unit, common area, superstructure, substructure, mechanical, electrical, plumbing, and other property repairs or restorations that prolong the useful life of the building. Meaningful repairs or restorations include onsite improvements, offsite improvements, rehabilitation costs for physical improvements to the property, and construction contingency but do not include general contractor fees or overhead, general requirements,

architect and engineering fees, permit fees, financing or soft costs, and developer fees.

5.~~3.~~ "Substantially completed" means the date on which a project receives its certificate of occupancy. If the project has multiple buildings or phases, the property owner must submit its first submission of a request for a certification notice within 5 years after the date on which the last certificate of occupancy was issued for the project ~~has the same meaning as in s. 192.042(1)~~.

(b) Notwithstanding ss. 196.195 and 196.196, portions of property in a multifamily project are considered property used for a charitable purpose and are eligible to receive an ad valorem property tax exemption if such portions meet all of the following conditions:

~~1. Provide affordable housing to natural persons or families meeting the income limitations provided in paragraph (d).~~

1.a.~~2.a.~~ Are within a newly constructed multifamily project that contains at least one unit that is ~~more than 70 units~~ dedicated to, or, for an adaptive reuse project as defined in s. 196.1979(1), at least 20 percent of the project's residential units are dedicated to, housing natural persons or families meeting the income limitations provided in paragraph (d); or

b. Are within a newly constructed multifamily project, or

an adaptive reuse project as defined in s. 196.1979(1), in an area of critical state concern, as designated by s. 380.0552 or chapter 28-36, Florida Administrative Code, which contains more than 10 units dedicated to, or, for an adaptive reuse project, at least 20 percent of the project's residential units are dedicated to, housing natural persons or families meeting the income limitations provided in paragraph (d).

2.~~3.~~ Are rented or, if vacant, posted for rent for an amount that does not exceed the amount as specified by the most recent multifamily rental programs income and rent limit chart posted by the corporation and derived from the Multifamily Tax Subsidy Projects Income Limits published by the United States Department of Housing and Urban Development or 90 percent of the fair market value rent as determined by a rental market study meeting the requirements of paragraph (l), whichever is less.

(d)1. The property appraiser shall exempt:

a. Seventy-five percent of the assessed value of the units in multifamily projects that meet the requirements of this subsection and are used to house natural persons or families whose annual household income at the time the lease is executed is greater than 80 percent but not more than 120 percent of the median annual adjusted gross income for households within the metropolitan statistical area or, if not within a metropolitan statistical area, within the county in which the person or family resides; ~~and~~

b. From ad valorem property taxes the units in multifamily projects that meet the requirements of this subsection and are used to house natural persons or families whose annual household income at the time the lease is executed does not exceed 80 percent of the median annual adjusted gross income for households within the metropolitan statistical area or, if not within a metropolitan statistical area, within the county in which the person or family resides; and

c. At least 75 percent of the assessed value of all affordable units within a qualified development authorized pursuant to s. 125.01055 or s. 166.04151.

However, if the income of tenants residing in a unit that received the exemption in the previous year increases above the income thresholds prescribed in sub-subparagraphs a. and b., the unit remains eligible for the exemption if such tenants voluntarily vacate the unit and the tenants to whom the property owner subsequently rents the unit to satisfy the income thresholds.

2. When determining the value of a unit for purposes of applying an exemption pursuant to this paragraph, the property appraiser must include in such valuation the proportionate share of the residential common areas, including the land, fairly attributable to such unit. The property appraiser shall calculate the value of the exemption based on the number of

units satisfying the income and rent requirements of this subsection, which shall include the proportionate share of the residential common areas attributable to each unit.

(e) To be eligible to receive an exemption under this subsection, a property owner must submit an application on a form prescribed by the department by March 1 for the exemption, accompanied by a certification notice from the corporation to the property appraiser. The property appraiser shall review the application and determine whether the original applicant or subsequent property owner meets all of the requirements of this subsection and is entitled to an exemption. A property appraiser may request and review additional information necessary to make such determination. A property appraiser may grant an exemption only for a property for which the corporation has issued a certification notice and which the property appraiser determines is entitled to an exemption.

(f) To receive a certification notice, a property owner must submit a request to the corporation on a form provided by the corporation which includes all of the following:

1. The most recently completed rental market study meeting the requirements of paragraph (l).

2. A list of the units for which the property owner seeks an exemption. The property owner of a multifamily project that receives an exemption in any taxable year may:

a. Revise the list for an exemption sought in any

subsequent taxable year by adding units to the list or removing units from the list or both; or

b. Increase or decrease the number of units for which an exemption is sought in any subsequent taxable year,

so long as the multifamily project continues to meet any minimum number of percentage of units dedicated to affordable housing, which is required by law for the exemption.

3. The rent amount received by the property owner for each occupied unit and the published rent amount for each vacant unit for which the property owner seeks an exemption. If a unit is vacant and qualifies for an exemption under paragraph (c), the property owner must provide evidence of the published rent amount for each vacant unit.

4. A sworn statement, under penalty of perjury, from the applicant restricting the property for a period of not less than 3 years to housing persons or families who meet the income limitations under this subsection. If the property is foreclosed, the foreclosing party may elect to void the sworn statement and remove the project from qualifying for the exemption or, if the project remains in compliance with this subsection, continue to apply for and receive the exemption.

(n) Upon the request of a property owner, the property appraiser must issue a letter to verify that a multifamily project, if constructed and leased as described in the site

plan, qualifies for the exemption under this section. Within 30 days after receipt of the request described in this paragraph, the property appraiser must issue a verification letter or explain why the project is ineligible for the exemption. A project that has received a verification letter before the adoption of the ordinance described in paragraph (p) is exempt from such ordinance. The verification letter is prima facie evidence that the project is eligible for the exemption if the project is constructed and leased as described in the site plan used to receive the verification letter. This letter shall qualify the project, if constructed and leased as described in the site plan, to obtain the exemption beginning with the January 1 assessment immediately after the date on which the property obtains a certificate of occupancy and is placed in service allowing the property to be used as an affordable housing property.

(p)1.~~(o)1.~~ Beginning with the 2025 tax roll, a taxing authority may elect, upon adoption of an ordinance or resolution approved by a two-thirds vote of the governing body, not to exempt property under sub-subparagraph (d)1.a. located in a county specified pursuant to subparagraph 2., subject to the conditions of this paragraph.

2. A taxing authority must make a finding in the ordinance or resolution that annual housing reports ~~the most recently~~ published by the Shimberg Center for Housing Studies ~~Annual~~

~~Report, prepared~~ pursuant to s. 420.6075 identify~~, identifies~~ that a county that is part of the jurisdiction of the taxing authority is within a metropolitan statistical area or region where, for each of the previous 3 years, the number of affordable and available units in the metropolitan statistical area or region is greater than the number of renter households in the metropolitan statistical area or region for the category entitled "0-120 percent AMI."

3. An election made pursuant to this paragraph may apply only to the ad valorem property tax levies imposed within a county specified pursuant to subparagraph 2. by the taxing authority making the election.

4. The ordinance or resolution must take effect on the January 1 immediately succeeding adoption and shall expire on the following ~~second~~ January 1 ~~after the January 1 in which the ordinance or resolution takes effect~~. The ordinance or resolution may be renewed before ~~prior to~~ its expiration pursuant to this paragraph if the taxing authority makes the same finding required in subparagraph 2.

5. The taxing authority proposing to make an election under this paragraph must advertise the ordinance or resolution or renewal thereof pursuant to the requirements of s. 50.011(1) before ~~prior to~~ adoption. The taxing authority may not utilize the emergency enactment procedures under s. 125.66.

6. The taxing authority must provide to the property

appraiser the adopted ordinance or resolution or renewal thereof by the effective date of the ordinance or resolution or renewal thereof.

7. Notwithstanding an ordinance or resolution or renewal thereof adopted pursuant to this paragraph, a ~~property owner of a~~ multifamily project that ~~who~~ was granted an exemption, at least in part, pursuant to sub-subparagraph (d)1.a. before ~~the~~ adoption or renewal of an ~~such~~ ordinance or resolution may continue to receive an ~~such~~ exemption for each subsequent consecutive year that the property owner, or a subsequent owner, transferee, or assignee, applies for and is granted the exemption.

8. Notwithstanding an ordinance or resolution, or renewal thereof, adopted pursuant to this paragraph, a proposed development that has been administratively approved under s. 125.01055(7)(e) or s. 166.04151(7)(e) before the adoption or renewal of such ordinance or resolution must be eligible to receive the exemption for each year it applies for and is granted the exemption.

9. Before adoption of an ordinance or resolution pursuant to this paragraph, the taxing authority must conduct an assessment on the taxing authority's current need for affordable housing at each of the extremely-low-income, very-low-income, and low-income limits specified in s. 420.0004, including supply and demand projections of such need for at least the next 5

years. The needs assessment must be presented at the same public meeting at which the proposed ordinance or resolution not to exempt property is adopted by the taxing authority's governing body.

10. A taxing authority adopting or renewing an ordinance or resolution pursuant to this paragraph must provide notice of such ordinance or resolution to the corporation in the format prescribed by the corporation. Each year, within 60 days before the regular session of the Legislature, the corporation shall submit an annual report to the Governor, the President of the Senate, and the Speaker of the House of Representatives on the adoption or renewal of such ordinances and resolutions.

11. The owner of a multifamily project that would otherwise qualify for an affordable housing ad valorem tax exemption under this subsection, which is adversely affected by an ordinance or resolution adopted or renewed in violation of this paragraph, has a cause of action against the taxing authority and may recover injunctive relief and compensatory damages therefor before a court of competent jurisdiction. The court may also award reasonable attorney fees and costs, not to exceed $100,000, to a prevailing plaintiff. For purposes of this subparagraph, the term "reasonable attorney fees and costs" means the reasonable and necessary attorney fees and costs incurred for all preparations, motions, hearings, trials, and appeals in a proceeding. The term does not include attorney fees

or costs directly incurred by or associated with litigation to determine an award of reasonable attorney fees or costs.

(5) ~~(4)~~

(b) The multifamily project must:

1. Be composed of an improvement to land where an improvement did not previously exist or the construction of a new improvement where an old improvement was removed, which was substantially completed within 2 years before the first submission of an application for exemption under this subsection. For purposes of this subsection, the term "substantially completed" has the same definition as in s. 192.042(1).

2. Contain at least one unit that is ~~more than 70 units that are~~ used to, or, for an adaptive reuse project as defined in s. 196.1979(1), at least 20 percent of the project's residential units are used to, provide affordable housing to natural persons or families meeting the extremely-low-income, very-low-income, or low-income limits specified in s. 420.0004.

3. Be subject to a land use restriction agreement with the Florida Housing Finance Corporation, or a housing finance authority pursuant to part IV of chapter 159, recorded in the official records of the county in which the property is located that requires that the property be used for 99 years to provide affordable housing to natural persons or families meeting the extremely-low-income, very-low-income, low-income, or moderate-

income limits specified in s. 420.0004. The agreement must include a provision for a penalty for ceasing to provide affordable housing under the agreement before the end of the agreement term that is equal to 100 percent of the total value of the ad valorem tax exemption received to date ~~amount financed by the corporation multiplied by each year remaining in the agreement~~. The agreement may be terminated or modified without penalty if the exemption under this subsection is repealed.

The property is no longer eligible for this exemption if the property no longer serves extremely-low-income, very-low-income, or low-income persons pursuant to the recorded agreement.

(d)1. The property appraiser shall apply the exemption to those portions of the affordable housing property that are dedicated to providing ~~provide~~ housing to natural persons or families meeting the extremely-low-income, very-low-income, or low-income limits specified in s. 420.0004 before certifying the tax roll to the tax collector.

2. When determining the value of the portion of property used to provide affordable housing for purposes of applying an exemption pursuant to this subsection, the property appraiser must include in such valuation the proportionate share of the residential common areas, including the land, fairly attributable to such portion of property.

(f) Property receiving an exemption pursuant to subsection

(4) ~~(3)~~ or s. 196.1979 is not eligible for this exemption.

(6) A person who purchases a property described in subparagraph (3)(b)2. is eligible to continue to receive an exemption under this section until December 31, 2059, as long as the property complies with the requirements of this section.

Section 2. Subsections (1) through (8) and (9) of section 196.1979, Florida Statutes, are renumbered as subsections (2) through (9) and (12), respectively, present subsection (1), paragraphs (c), (e), (i), and (j) of present subsection (3), and present subsection (4) are amended, and a new subsection (1) and subsections (10) and (11) are added to that section, to read:

196.1979 County and municipal affordable housing property exemption.—

(1) As used in this section, the term "adaptive reuse project" means a conversion of an existing nonresidential building or structure into multifamily or mixed-use residential housing.

(2)(a) ~~(1)(a)~~ Notwithstanding ss. 196.195 and 196.196, the board of county commissioners of a county or the governing body of a municipality may adopt an ordinance to exempt those portions of property used to provide affordable housing meeting the requirements of this section. Such property is considered property used for a charitable purpose. To be eligible for the exemption, the portions of property:

1. Must be used to house natural persons or families whose

annual household income:

a. Is greater than 30 percent but not more than 60 percent of the median annual adjusted gross income for households within the metropolitan statistical area or, if not within a metropolitan statistical area, within the county in which the person or family resides; or

b. Does not exceed 30 percent of the median annual adjusted gross income for households within the metropolitan statistical area or, if not within a metropolitan statistical area, within the county in which the person or family resides;

2. Must be within a multifamily project containing 50 or more residential units, or less as provided in subparagraph (c)2., or an adaptive reuse project of which at least 20 percent of the project's residential units ~~which~~ are used to provide affordable housing that meets the requirements of this section;

3. Must be rented for an amount no greater than the amount as specified by the most recent multifamily rental programs income and rent limit chart posted by the corporation and derived from the Multifamily Tax Subsidy Projects Income Limits published by the United States Department of Housing and Urban Development or 90 percent of the fair market value rent as determined by a rental market study meeting the requirements of subsection (5) ~~(4)~~, whichever is less;

4. May not have been cited for code violations on three or more occasions in the 24 months before the submission of a tax

exemption application;

5. May not have any cited code violations that have not been properly remedied by the property owner before the submission of a tax exemption application; and

6. May not have any unpaid fines or charges relating to the cited code violations. Payment of unpaid fines or charges before a final determination on a property's qualification for an exemption under this section will not exclude such property from eligibility if the property otherwise complies with all other requirements for the exemption.

(b) Qualified property may receive an ad valorem property tax exemption of:

1. Up to 75 percent of the assessed value of each residential unit used to provide affordable housing if fewer than 100 percent of the multifamily project's or adaptive reuse project's residential units are used to provide affordable housing meeting the requirements of this section.

2. Up to 100 percent of the assessed value of each residential unit used to provide affordable housing if 100 percent of the multifamily project's or adaptive reuse project's residential units are used to provide affordable housing meeting the requirements of this section.

(c) The board of county commissioners of the county or the governing body of the municipality, as applicable, may choose to adopt an ordinance that exempts property:

1. Used to provide affordable housing for natural persons or families meeting the income limits of sub-subparagraph (a)1.a., natural persons or families meeting the income limits of sub-subparagraph (a)1.b., or both.

2. Within a multifamily project containing at least five units.

(4) ~~(3)~~ An ordinance granting the exemption authorized by this section must:

(c) Require the property owner to apply for certification by the local entity in order to receive the exemption. The application for certification must be on a form provided by the local entity designated pursuant to paragraph (b) and include all of the following:

1. The most recently completed rental market study meeting the requirements of subsection (5) ~~(4)~~.

2. A list of the units for which the property owner seeks an exemption.

3. The rent amount received by the property owner for each unit for which the property owner seeks an exemption. If a unit is vacant and qualifies for an exemption under subsection (3) ~~(2)~~, the property owner must provide evidence of the published rent amount for the vacant unit.

(e) Require the eligible unit to meet the eligibility criteria of paragraph (2)(a) ~~(1)(a)~~.

(i) Identify the percentage of the assessed value which is

exempted, subject to the percentage limitations in paragraph (2)(b) ~~(1)(b)~~.

(j) Identify whether the exemption applies to natural persons or families meeting the income limits of sub-subparagraph (2)(a)1.a. ~~(1)(a)1.a.~~, natural persons or families meeting the income limits of sub-subparagraph (2)(a)1.b. ~~(1)(a)1.b.~~, or both.

(5)~~(4)~~ A rental market study submitted as required by paragraph (4)(c) ~~(3)(c)~~ must identify the fair market value rent of each unit for which a property owner seeks an exemption. Only a certified general appraiser, as defined in s. 475.611, may issue a rental market study. The certified general appraiser must be independent of the property owner who requests a rental market study. In preparing the rental market study, a certified general appraiser shall comply with the standards of professional practice pursuant to part II of chapter 475 and use comparable property within the same geographic area and of the same type as the property for which the exemption is sought. A rental market study must have been completed within 3 years before submission of the application.

(10) Qualifying developments authorized pursuant to s. 125.01055 or s. 166.04151 may abate up to 20 percent of the development's ad valorem property tax for a period of 10 years by paying an amount equal to 20 percent of the total amount of the ad valorem property taxes to be abated at the time a

building permit is issued for the qualifying development.

(11) The Florida Housing Finance Corporation shall adopt rules establishing standards for monitoring and compliance of a property owner that receives an ad valorem property tax exemption under this section, including a multifamily's or adaptive reuse project's minimum number or percentage of residential units used to provide affordable housing that meets the requirements of this section. A county or municipality may not impose compliance monitoring requirements more stringent than the standards adopted by the corporation.

Section 3. Paragraph (d) of subsection (2) of section 212.055, Florida Statutes, is amended to read:

212.055 Discretionary sales surtaxes; legislative intent; authorization and use of proceeds.—It is the legislative intent that any authorization for imposition of a discretionary sales surtax shall be published in the Florida Statutes as a subsection of this section, irrespective of the duration of the levy. Each enactment shall specify the types of counties authorized to levy; the rate or rates which may be imposed; the maximum length of time the surtax may be imposed, if any; the procedure which must be followed to secure voter approval, if required; the purpose for which the proceeds may be expended; and such other requirements as the Legislature may provide. Taxable transactions and administrative procedures shall be as provided in s. 212.054.

(2) LOCAL GOVERNMENT INFRASTRUCTURE SURTAX.—

(d) The proceeds of the surtax authorized by this subsection and any accrued interest shall be expended by the school district, within the county and municipalities within the county, or, in the case of a negotiated joint county agreement, within another county, to finance, plan, and construct infrastructure; to acquire any interest in land for public recreation, conservation, or protection of natural resources or to prevent or satisfy private property rights claims resulting from limitations imposed by the designation of an area of critical state concern; to provide loans, grants, or rebates to residential or commercial property owners who make energy efficiency improvements to their residential or commercial property, if a local government ordinance authorizing such use is approved by referendum; or to finance the closure of county-owned or municipally owned solid waste landfills that have been closed or are required to be closed by order of the Department of Environmental Protection. Any use of the proceeds or interest for purposes of landfill closure before July 1, 1993, is ratified. The proceeds and any interest may not be used for the operational expenses of infrastructure, except that a county that has a population of fewer than 75,000 and that is required to close a landfill may use the proceeds or interest for long-term maintenance costs associated with landfill closure. Counties, as defined in s. 125.011, and charter counties may, in

addition, use the proceeds or interest to retire or service indebtedness incurred for bonds issued before July 1, 1987, for infrastructure purposes, and for bonds subsequently issued to refund such bonds. Any use of the proceeds or interest for purposes of retiring or servicing indebtedness incurred for refunding bonds before July 1, 1999, is ratified.

1. For the purposes of this paragraph, the term "infrastructure" means:

a. Any fixed capital expenditure or fixed capital outlay associated with the construction, reconstruction, or improvement of public facilities that have a life expectancy of 5 or more years, any related land acquisition, land improvement, design, and engineering costs, and all other professional and related costs required to bring the public facilities into service. For purposes of this sub-subparagraph, the term "public facilities" means facilities as defined in s. 163.3164(41), s. 163.3221(13), or s. 189.012(5), and includes facilities that are necessary to carry out governmental purposes, including, but not limited to, fire stations, general governmental office buildings, and animal shelters, regardless of whether the facilities are owned by the local taxing authority or another governmental entity.

b. A fire department vehicle, an emergency medical service vehicle, a sheriff's office vehicle, a police department vehicle, or any other vehicle, and the equipment necessary to outfit the vehicle for its official use or equipment that has a

life expectancy of at least 5 years.

c. Any expenditure for the construction, lease, or maintenance of, or provision of utilities or security for, facilities, as defined in s. 29.008.

d. Any fixed capital expenditure or fixed capital outlay associated with the improvement of private facilities that have a life expectancy of 5 or more years and that the owner agrees to make available for use on a temporary basis as needed by a local government as a public emergency shelter or a staging area for emergency response equipment during an emergency officially declared by the state or by the local government under s. 252.38. Such improvements are limited to those necessary to comply with current standards for public emergency evacuation shelters. The owner must enter into a written contract with the local government providing the improvement funding to make the private facility available to the public for purposes of emergency shelter at no cost to the local government for a minimum of 10 years after completion of the improvement, with the provision that the obligation will transfer to any subsequent owner until the end of the minimum period.

e. Any land acquisition expenditure for a residential housing project in which at least 30 percent of the units are affordable to individuals or families whose total annual household income does not exceed 120 percent of the area median income adjusted for household size, if the land is owned by a

local government or by a special district that enters into a written agreement with the local government to provide such housing. The local government or special district may enter into a ground lease with a public or private person or entity for nominal or other consideration for the construction of the residential housing project on land acquired pursuant to this sub-subparagraph.

f. Any expenditure to construct or rehabilitate housing that, for a period of at least 30 years, is affordable as defined in s. 420.0004.

g.~~f.~~ Instructional technology used solely in a school district's classrooms. As used in this sub-subparagraph, the term "instructional technology" means an interactive device that assists a teacher in instructing a class or a group of students and includes the necessary hardware and software to operate the interactive device. The term also includes support systems in which an interactive device may mount and is not required to be affixed to the facilities.

2. For the purposes of this paragraph, the term "energy efficiency improvement" means any energy conservation and efficiency improvement that reduces consumption through conservation or a more efficient use of electricity, natural gas, propane, or other forms of energy on the property, including, but not limited to, air sealing; installation of insulation; installation of energy-efficient heating, cooling,

or ventilation systems; installation of solar panels; building modifications to increase the use of daylight or shade; replacement of windows; installation of energy controls or energy recovery systems; installation of electric vehicle charging equipment; installation of systems for natural gas fuel as defined in s. 206.9951; and installation of efficient lighting equipment.

3. Notwithstanding any other provision of this subsection, a local government infrastructure surtax imposed or extended after July 1, 1998, may allocate up to 15 percent of the surtax proceeds for deposit into a trust fund within the county's accounts created for the purpose of funding economic development projects having a general public purpose of improving local economies, including the funding of operational costs and incentives related to economic development. The ballot statement must indicate the intention to make an allocation under the authority of this subparagraph.

Section 4. Subsections (24) and (25) of section 213.053, Florida Statutes, are renumbered as subsections (25) and (26), respectively, and a new subsection (24) is added to that section to read:

213.053 Confidentiality and information sharing.—

(24) The department may make available to the Division of Historical Resources of the Department of State and the Secretary of the Interior or his or her delegate, exclusively

for official purposes, information for the purposes of administering s. 220.197.

Section 5. Subsection (8) of section 220.02, Florida Statutes, is amended to read:

220.02 Legislative intent.—

(8) It is the intent of the Legislature that credits against either the corporate income tax or the franchise tax be applied in the following order: those enumerated in s. 631.828, those enumerated in s. 220.191, those enumerated in s. 220.181, those enumerated in s. 220.183, those enumerated in s. 220.182, those enumerated in s. 220.1895, those enumerated in s. 220.195, those enumerated in s. 220.184, those enumerated in s. 220.186, those enumerated in s. 220.1845, those enumerated in s. 220.19, those enumerated in s. 220.185, those enumerated in s. 220.1875, those enumerated in s. 220.1876, those enumerated in s. 220.1877, those enumerated in s. 220.1878, those enumerated in s. 220.193, those enumerated in former s. 288.9916, those enumerated in former s. 220.1899, those enumerated in former s. 220.194, those enumerated in s. 220.196, those enumerated in s. 220.198, those enumerated in s. 220.1915, those enumerated in s. 220.199, those enumerated in s. 220.1991, ~~and~~ those enumerated in s. 220.1992, and those enumerated in s. 220.197.

Section 6. Paragraph (a) of subsection (1) of section 220.13, Florida Statutes, is amended to read:

220.13 "Adjusted federal income" defined.—

(1) The term "adjusted federal income" means an amount equal to the taxpayer's taxable income as defined in subsection (2), or such taxable income of more than one taxpayer as provided in s. 220.131, for the taxable year, adjusted as follows:

(a) Additions.—There shall be added to such taxable income:

1.a. The amount of any tax upon or measured by income, excluding taxes based on gross receipts or revenues, paid or accrued as a liability to the District of Columbia or any state of the United States which is deductible from gross income in the computation of taxable income for the taxable year.

b. Notwithstanding sub-subparagraph a., if a credit taken under s. 220.1875, s. 220.1876, s. 220.1877, or s. 220.1878 is added to taxable income in a previous taxable year under subparagraph 11. and is taken as a deduction for federal tax purposes in the current taxable year, the amount of the deduction allowed shall not be added to taxable income in the current year. The exception in this sub-subparagraph is intended to ensure that the credit under s. 220.1875, s. 220.1876, s. 220.1877, or s. 220.1878 is added in the applicable taxable year and does not result in a duplicate addition in a subsequent year.

2. The amount of interest which is excluded from taxable income under s. 103(a) of the Internal Revenue Code or any other

federal law, less the associated expenses disallowed in the computation of taxable income under s. 265 of the Internal Revenue Code or any other law, excluding 60 percent of any amounts included in alternative minimum taxable income, as defined in s. 55(b)(2) of the Internal Revenue Code, if the taxpayer pays tax under s. 220.11(3).

3. In the case of a regulated investment company or real estate investment trust, an amount equal to the excess of the net long-term capital gain for the taxable year over the amount of the capital gain dividends attributable to the taxable year.

4. That portion of the wages or salaries paid or incurred for the taxable year which is equal to the amount of the credit allowable for the taxable year under s. 220.181. This subparagraph shall expire on the date specified in s. 290.016 for the expiration of the Florida Enterprise Zone Act.

5. That portion of the ad valorem school taxes paid or incurred for the taxable year which is equal to the amount of the credit allowable for the taxable year under s. 220.182. This subparagraph shall expire on the date specified in s. 290.016 for the expiration of the Florida Enterprise Zone Act.

6. The amount taken as a credit under s. 220.195 which is deductible from gross income in the computation of taxable income for the taxable year.

7. That portion of assessments to fund a guaranty association incurred for the taxable year which is equal to the

amount of the credit allowable for the taxable year.

8. In the case of a nonprofit corporation which holds a pari-mutuel permit and which is exempt from federal income tax as a farmers' cooperative, an amount equal to the excess of the gross income attributable to the pari-mutuel operations over the attributable expenses for the taxable year.

9. The amount taken as a credit for the taxable year under s. 220.1895.

10. Up to nine percent of the eligible basis of any designated project which is equal to the credit allowable for the taxable year under s. 220.185.

11. Any amount taken as a credit for the taxable year under s. 220.1875, s. 220.1876, s. 220.1877, or s. 220.1878. The addition in this subparagraph is intended to ensure that the same amount is not allowed for the tax purposes of this state as both a deduction from income and a credit against the tax. This addition is not intended to result in adding the same expense back to income more than once.

12. The amount taken as a credit for the taxable year under s. 220.193.

13. The amount taken as a credit for the taxable year under s. 220.196. The addition in this subparagraph is intended to ensure that the same amount is not allowed for the tax purposes of this state as both a deduction from income and a credit against the tax. The addition is not intended to result

in adding the same expense back to income more than once.

14. The amount taken as a credit for the taxable year pursuant to s. 220.198.

15. The amount taken as a credit for the taxable year pursuant to s. 220.1915.

16. The amount taken as a credit for the taxable year pursuant to s. 220.199.

17. The amount taken as a credit for the taxable year pursuant to s. 220.1991.

18. The amount taken as a credit for the taxable year pursuant to s. 220.197.

Section 7. Section 220.197, Florida Statutes, is created to read:

220.197 Florida Housing Revitalization Act; tax credits; reports.—

(1) SHORT TITLE.—This section may be cited as the "Florida Housing Revitalization Act."

(2) DEFINITIONS.—As used in this section, the term:

(a) "Affordable" has the same meaning as in s. 420.0004(3).

(b) "Certified historic structure" means a building, including its structural components, as defined in 36 C.F.R. s. 67.2, which is of a character subject to the allowance for depreciation provided in s. 167 of the Internal Revenue Code of 1986, as amended, and which is:

1. Individually listed in the National Register of Historic Places; or

2. Located within a registered historic district and certified by the Secretary of the Interior as being of historic significance to the registered historic district as set forth in 36 C.F.R. s. 67.2.

(c) "Certified rehabilitation" means the rehabilitation of a certified historic structure that the Secretary of the Interior has certified to the Secretary of the Treasury as being consistent with the historic character of the certified historic structure and, if applicable, consistent with the registered historic district in which the certified historic structure is located as set forth in 36 C.F.R. s. 67.2.

(d) "Corporation" means the Florida Housing Finance Corporation.

(e) "Division" means the Division of Historical Resources of the Department of State.

(f) "Long-term leasehold" means a leasehold in a nonresidential real property for a term of 39 years or more or a leasehold in a residential real property for a term of 27.5 years or more.

(g) "National Register of Historic Places" means the list of historic properties significant in American history, architecture, archeology, engineering, and culture maintained by the Secretary of the Interior as authorized in 54 U.S.C. s.

3021.

(h) "Placed in service" means when the property is first placed by the taxpayer in a condition or state of readiness and availability for a specifically assigned function, whether for use in a trade or business, for the production of income, or in a tax-exempt activity.

(i) "Qualified expenses" means rehabilitation expenditures incurred in this state that qualify for the credit under 26 U.S.C. s. 47.

(j) "Registered historic district" means a district listed in the National Register of Historic Places or a district:

1. Designated under general law or local ordinance and certified by the Secretary of the Interior as meeting criteria that will substantially achieve the purposes of preserving and rehabilitating buildings of historic significance to the district; and

2. Certified by the Secretary of the Interior as meeting substantially all of the requirements for listing a district in the National Register of Historic Places.

(k) "Taxpayer" has the same meaning as in s. 220.03(1)(z) and includes an insurer subject to the insurance premium tax under s. 624.509.

(l) "Workforce housing" has the same meaning as in s. 420.5095(3).

(3) ELIGIBILITY FOR TAX CREDIT.—For taxable years

beginning on or after January 1, 2026, there is allowed a credit in an amount equal to 20 percent of the total qualified expenses incurred in rehabilitating a certified historic structure that has been approved by the National Park Service to receive the federal historic rehabilitation tax credit. The credit may be used against any tax due for a taxable year under this chapter and the insurance premium tax imposed in s. 624.509 after the application of any other allowable credits. An insurer claiming a credit against insurance premium liability tax under this section may not be required to pay any additional retaliatory tax levied pursuant to s. 624.5091 as a result of claiming such credit. Section 624.5091 does not limit such credit in any manner. A taxpayer may not receive more than $2.5 million in tax credits for a single project, even if such credits are accrued over multiple tax years.

(a) To receive a tax credit under this section, within 6 months after the date a certified historical structure is placed into service, the taxpayer must apply to the division, and submit an application to the department, for a tax credit for qualified expenses in the amount and under the conditions and limitations provided in this section. The taxpayer must provide the division with all of the following:

1. Documentation showing that:

a. The rehabilitation is a certified rehabilitation.

b. The structure is a certified historic structure, is

income-producing, is located within the state, and was placed into service on or after January 1, 2026.

c. The taxpayer had an ownership or a long-term leasehold interest in the certified historic structure during the year in which such structure was placed into service after the certified rehabilitation was complete.

d. The total qualified expenses incurred in rehabilitating the certified historic structure exceeded $5,000.

e. The applicant intends to exclusively utilize the historic structure to provide affordable or workforce housing.

2. An official certificate of eligibility from the division, signed by the State Historic Preservation Officer or the Deputy State Historic Preservation Officer, attesting that the project has been approved by the National Park Service.

3. National Park Service Form 10-168c (Rev. 2023), titled "Historic Preservation Certification Application Part 3-Request for Certification of Completed Work," or a similar form, signed by an officer of the National Park Service, attesting that the completed rehabilitation meets the Secretary of the Interior's Standards for Rehabilitation and is consistent with the historic character of the property and, if applicable, the district in which the completed rehabilitation is located. The form may be obtained through the National Park Service.

4. Evidence that the certified historic structure was placed into service after the certified rehabilitation was

complete. Such evidence must identify the dates rehabilitation was started and completed and the date the structure was placed into service.

5. A list of total qualified expenses incurred by the taxpayer in rehabilitating the certified historic structure. For certified rehabilitations with qualified expenses that exceeded $750,000, the taxpayer must submit an audited cost report issued by a certified public accountant which itemizes the qualified expenses incurred in rehabilitating the certified historic structure. A taxpayer may submit an audited cost report issued by a certified public accountant which was created for the purposes of applying for a federal historic rehabilitation tax credit and which includes all of the qualified expenses incurred in rehabilitating the certified historic structure.

6. An attestation of the total qualified expenses incurred in rehabilitating the certified historic structure.

7. A certification from the corporation stating that all housing provided by the project meets state requirements for affordable or workforce housing.

8. The information required to be reported by the department in subsection (7) to enable the department to compile its annual report.

A taxpayer may begin the application process before the certified historic structure is placed into service; however, a

final determination on eligibility may not be made until after the certified historic structure is placed into service.

(b) The department shall only deem a project eligible for this tax credit if the applicant exclusively submits qualified expenses used to create affordable or workforce housing.

(c) Affordable or workforce housing must be provided for at least 5 years or the applicant shall be subject to forfeiture of the tax credit as provided under paragraph (7)(g).

(d) Within 90 days after receipt of the information required under paragraph (a) or the certified historic structure is placed into service, whichever is later, the division must approve or deny the application. If approved, the division must submit a copy of the certification and the information provided by the applicant to the department within 10 days after the division's approval.

(4) CARRYFORWARD OF TAX CREDIT.—

(a) If a taxpayer is eligible for a tax credit that exceeds taxes owed, the taxpayer may carry the unused tax credit forward for a period of up to 5 taxable years.

(b) A carryforward is considered the remaining portion of a tax credit that cannot be claimed in the current tax year.

(5) SALE OR TRANSFER OF TAX CREDIT.—

(a) A taxpayer that incurs qualified expenses may sell or transfer all or part of the tax credit that may otherwise be claimed to another taxpayer.

(b) A taxpayer to which all or part of the tax credit is sold or transferred may sell or transfer all or part of the tax credit that may otherwise be claimed to another taxpayer.

(c) A taxpayer that sells or transfers a tax credit to another taxpayer must provide a copy of the certificate of eligibility together with the audited cost report to the purchaser or transferee.

(d) Qualified expenses may be counted only once in determining the amount of an available tax credit, and more than one taxpayer may not claim a tax credit for the same qualified expenses.

(e) There is no limit on the total number of transactions for the sale or transfer of all or part of a tax credit.

(f)1. A taxpayer that sells or transfers a tax credit under this subsection and the purchaser or transferee shall jointly submit written notice of the sale or transfer to the department on a form adopted by the department no later than 30 days after the date of the sale or transfer. The notice must include all of the following:

a. The date of the sale or transfer.

b. The amount of the tax credit sold or transferred.

c. The name and federal tax identification number of the taxpayer that sold or transferred the tax credit and the purchaser or transferee.

d. The amount of the tax credit owned by the taxpayer

before the sale or transfer and the amount the selling or transferring taxpayer retained, if any, after the sale or transfer.

2. The sale or transfer of a tax credit under this subsection does not extend the period for which a tax credit may be carried forward and does not increase the total amount of the tax credit that may be claimed.

3. If a taxpayer claims a tax credit for qualified expenses, another taxpayer may not use the same expenses as the basis for claiming a tax credit.

4. Notwithstanding the requirements of this subsection, a tax credit earned by, purchased by, or transferred to a partnership, limited liability company, S corporation, or other pass-through entity may be allocated to the partners, members, or shareholders of that entity and claimed under this section in accordance with any agreement among the partners, members, or shareholders and without regard to the ownership interest of the partners, members, or shareholders in the rehabilitated certified historic structure.

(g) If the tax credit is reduced due to a determination, examination, or audit by the department, the tax deficiency must be recovered from the taxpayer that sold or transferred the tax credit or the purchaser or transferee that claimed the tax credit up to the amount of the tax credit claimed.

(h) Any subsequent deficiencies shall be assessed against

the purchaser or transferee that claimed the tax credit or, in the case of multiple succeeding entities, in the order of tax credit succession.

(6) AUDIT AUTHORITY; REVOCATION AND FORFEITURE OF TAX CREDITS; FRAUDULENT CLAIMS.—

(a) The department, with the assistance of the division, may perform any additional financial and technical audits and examinations, including examining the accounts, books, or records of the taxpayer, to verify the legitimacy of the qualified expenses included in a tax credit return and to ensure compliance with this section. If requested by the department, the division must provide technical assistance for any technical audits or examinations performed under this subsection.

(b) It is grounds for forfeiture of previously claimed and received tax credits if the department determines, as a result of an audit or information received from the division or the United States Department of the Interior or Internal Revenue Service, that a taxpayer received a tax credit pursuant to this section to which the taxpayer was not entitled. In the case of fraud, the taxpayer may not claim any future tax credits under this section.

(c) The taxpayer must return forfeited tax credits to the department, and such funds shall be paid into the General Revenue Fund.

(d) The taxpayer shall file with the department an amended

tax return or such other report as the department prescribes and shall pay any required tax within 60 days after the taxpayer receives notification from the United States Internal Revenue Service that a previously approved tax credit has been revoked or modified, if uncontested, or within 60 days after a final order is issued following proceedings involving a contested revocation or modification order.

(e) A notice of deficiency may be issued by the department at any time within 5 years after the date on which the taxpayer receives notification from the United States Internal Revenue Service that a previously approved tax credit has been revoked or modified. If a taxpayer fails to notify the department of any change in its tax credit claimed, a notice of deficiency may be issued at any time. In either case, the amount of any proposed assessment set forth in such notice of deficiency is limited to the amount of the tax credit claimed.

(f) A taxpayer that fails to report and timely pay any tax due as a result of the forfeiture of its tax credit violates this section and is subject to applicable penalties and interest.

(g) A taxpayer that fails to provide affordable or workforce housing for at least 5 years forfeits the tax credit. The taxpayer must return the forfeited credit to the department, and such funds shall be paid into the General Revenue Fund. The forfeiture of the credit shall be prorated at a rate of 4

percent of the total credit for each year that housing was not provided.

(7) ANNUAL REPORT.—Based on the applications submitted and approved, the department must submit a report by December 1 of each year to the Governor, the President of the Senate, and the Speaker of the House of Representatives that identifies, in the aggregate, all of the following:

(a) The number of employees hired during construction phases.

(b) The use of each newly rehabilitated building and the expected number of employees hired.

(c) The number of affordable housing or workforce housing units created or preserved.

(d) The property values before and after the certified rehabilitations.

(8) DEPARTMENT DUTIES.—The department shall:

(a) Establish a cooperative agreement with the division.

(b) Adopt any necessary form required to claim a tax credit under this section.

(c) Provide administrative guidelines and procedures required to administer this section, including rules establishing an entitlement to and sale or transfer of a tax credit under this section.

(d) Provide examination and audit procedures required to administer this section.

(9) RULES.—The department, the division, and the corporation may adopt rules to administer this section, including the form of application and establishing qualifications for the tax credit.

Section 8. Subsection (36) of section 420.503, Florida Statutes, is amended to read:

420.503 Definitions.—As used in this part, the term:

(36) "Qualified contract" has the same meaning as in 26 U.S.C. s. 42(h)(6)(F) in effect on the date of the preliminary determination certificate for the low-income housing tax credits for the development that is the subject of the qualified contract request, unless the Internal Revenue Code requires a different statute or regulation to apply to the development. The corporation shall deem a bona fide contract to be a qualified contract at the time the second earnest money ~~bona fide contract is presented to the owner and the initial~~ deposit is deposited in escrow in accordance with the terms of the bona fide contract, and, in such event, the corporation is deemed to have fulfilled its responsibility to present the owner with a qualified contract.

Section 9. Subsection (5) of section 420.50871, Florida Statutes, is renumbered as subsection (6), paragraph (b) of subsection (1) and present subsection (5) are amended, and a new subsection (5) is added to that section, to read:

420.50871 Allocation of increased revenues derived from

amendments to s. 201.15 made by ch. 2023-17.—Funds that result from increased revenues to the State Housing Trust Fund derived from amendments made to s. 201.15 made by chapter 2023-17, Laws of Florida, must be used annually for projects under the State Apartment Incentive Loan Program under s. 420.5087 as set forth in this section, notwithstanding ss. 420.507(48) and (50) and 420.5087(1) and (3). The Legislature intends for these funds to provide for innovative projects that provide affordable and attainable housing for persons and families working, going to school, or living in this state. Projects approved under this section are intended to provide housing that is affordable as defined in s. 420.0004, notwithstanding the income limitations in s. 420.5087(2). Beginning in the 2023-2024 fiscal year and annually for 10 years thereafter:

(1) The corporation shall allocate 70 percent of the funds provided by this section to issue competitive requests for application for the affordable housing project purposes specified in this subsection. The corporation shall finance projects that:

(b) Address urban infill, including conversions of vacant, dilapidated, or functionally obsolete buildings or the use of underused commercial property. As used in this paragraph, the term "urban infill" has the same meaning as in s. 163.3164(51). The term includes the development or redevelopment of mobile home parks and manufactured home communities that meet the urban

infill criteria and the criteria for redevelopment of an existing affordable housing development as provided in paragraph (a).

(5) The corporation may not require a project financed under this section to use low-income housing tax credits under s. 42 of the Internal Revenue Code or tax-exempt bond financing.

Section 10. Paragraph (d) is added to subsection (5) of section 420.50872, Florida Statutes, to read:

420.50872 Live Local Program.—

(5) ADMINISTRATION; RULES.—

(d) The corporation may not require a project financed under this section to use low-income housing tax credits under s. 42 of the Internal Revenue Code or tax-exempt bond financing.

Section 11. Subsection (7) of section 624.509, Florida Statutes, is amended to read:

624.509 Premium tax; rate and computation.—

(7) Credits and deductions against the tax imposed by this section shall be taken in the following order: deductions for assessments made pursuant to s. 440.51; credits for taxes paid under ss. 175.101 and 185.08; credits for income taxes paid under chapter 220 and the credit allowed under subsection (5), as these credits are limited by subsection (6); the credit allowed under s. 624.51057; the credit allowed under s. 624.51058; the credit allowed under s. 624.5107; the credit allowed under s. 220.197; and all other available credits and

deductions.

Section 12. The amendments made by this act to ss. 196.1978 and 196.1979, Florida Statutes, and the creation of s. 220.197, Florida Statutes, first apply to the 2026 tax roll.

Section 13. This act shall take effect July 1, 2025.

A bill to be entitled

An act relating to real property and land use and development; amending ss. 125.01055 and 166.04151, F.S.; requiring the board of county commissioners and the governing body of a municipality, respectively, to approve the development of affordable housing on a parcel owned by a religious institution if certain requirements are met; requiring the board of county commissioners and the governing body of a municipality, respectively, to approve the development of housing that is affordable; providing definitions; requiring counties and municipalities, respectively, to authorize multifamily and mixed-use residential as allowable uses on sites owned by specified entities and in planned unit developments for specified use, if certain conditions are met; requiring counties and municipalities, respectively, to include adjacent land as part of multifamily development, regardless of land use designation, if certain conditions are met; prohibiting counties and municipalities, respectively, from requiring a proposed mixed-use residential development to obtain certain amendments; prohibiting counties and municipalities, respectively, from requiring more than a certain percentage of total square footage to be used for specified purposes;

requiring a specified definition of areas zoned for mixed use; providing that certain affordable or workforce units also qualify as affordable housing; prohibiting counties and municipalities, respectively, from restricting the density of a proposed multifamily or mixed-use residential development below the highest density on or after a specified date; prohibiting counties and municipalities, respectively, from restricting the maximum lot size of a proposed multifamily or mixed-use residential development below the highest maximum lot size on or after a specified date; prohibiting counties and municipalities, respectively, from restricting the floor area ratio of a proposed multifamily or mixed-use residential development below a certain percentage allowed on or after a specified date; prohibiting counties and municipalities, respectively, from restricting the height of a proposed multifamily or mixed-use residential development below the highest height on or after a specified date; revising the ability of counties and municipalities, respectively, to restrict the height of multifamily or mixed-use residential developments that are adjacent specified parcels to the highest height allowed on or after a specified date; requiring administrative approval of proposed

multifamily or mixed-use residential developments without a public hearing in certain instances; prohibiting counties and municipalities, respectively, from initiating or enforcing zoning-in-progress or building moratoriums in certain instances; requiring counties and municipalities, respectively, to maintain on its website a specified policy; requiring a county and municipality, respectively, to reduce certain parking requirements by a specified percentage; requiring counties and municipalities, respectively, to approve, within a specified time frame, building permit plan review for proposed developments; providing for the awarding of attorney fees and costs under certain conditions; providing that if a county or municipality, respectively, adopts an ordinance or resolution, or makes any other decision, after a specified date having certain listed effects, the ordinance, resolution, or decision is deemed preempted; preempting the regulation of affordable housing to the state; providing that the administrative review process of a site plan filed with a county or municipality, respectively, must be based on land development regulations in effect as of the date of filing the application; requiring courts to expedite proceedings and render an order within a

specified timeframe if an action is filed against a local government based on preemption grounds; requiring notice of appeal to be filed and served within a specified timeframe from such judgment; requiring the Supreme Court to adopt rules by a specified date for such expedited proceedings; prohibiting counties and municipalities, respectively, from conditioning review or approval of applications for development permits or orders on the waiver, forbearance, or abandonment of any development right; deeming such actions to be void; providing certain reporting requirements beginning on a specified date; providing reporting requirements; prohibiting the imposition of a building moratorium under certain circumstances; providing that certain property owners have a cause of action; authorizing a court to provide specified relief, costs, and fees; providing a maximum award; providing that certain property owners have specified rights; amending s. 163.31801, F.S.; requiring an exception or waiver for a specified percentage of the impact fees for certain developments; amending s. 166.041, F.S.; revising procedures to require that resolutions with certain subjects be based on a certain finding by the governing body for adoption of such resolutions;

amending s. 163.2517, F.S.; requiring that proposed urban infill developments be administratively approved, notwithstanding any ordinance to the contrary before a specified date; amending s. 163.3164, F.S.; revising the definition of the terms "compatibility" and "urban service area"; amending s. 163.3177, F.S.; revising considerations when creating a comprehensive plan; revising future land use considerations for urban sprawl; amending s. 163.3167, F.S.; revising the scope of the Community Planning Act; amending s. 163.31771, F.S.; defining the term "department"; requiring local governments to adopt ordinances as they relate to accessory dwelling units; prohibiting local governments from increasing costs of construction of accessory dwelling units; providing exceptions; requiring local governments to submit annual reports beginning on a specified date to the Department of Commerce and post such reports on the local governments' website; requiring the department to post a summary of the reports on its website; providing requirements for the reports; authorizing the department to adopt rules; prohibiting an owner of property with an accessory dwelling unit from being denied a homestead exemption or homestead property assessment limitation solely on the basis of the

property containing an accessory dwelling unit; establishing requirements for homestead purposes if an accessory dwelling unit is rented by the property owner; requiring an accessory dwelling unit that is not rented to be considered part of homestead property; amending s. 196.1979, F.S.; authorizing the board of county commissioners or the governing body of a municipality to exempt specified portions of property within multifamily projects and accessory dwelling units used to provide affordable housing; revising ad valorem property tax exemption provisions for accessory dwelling units; amending s. 333.03, F.S.; revising applicability for certain proposed developments; defining the term "commercial service airport"; amending s. 420.50871, F.S.; expanding the scope of financing of affordable housing projects to include certain housing; creating s. 702.13, F.S.; providing definitions; authorizing the filing of motions to determine whether residential real property is abandoned real property; requiring certain documentation to be filed with such motions; requiring the trial court to set a hearing on such motions within a certain time frame; providing notice requirements; requiring the court to render a declaratory judgment upon certain findings and

immediately proceed to a foreclosure trial; requiring the court to enter a judgment of foreclosure and schedule a public sale of the abandoned real property upon certain findings; prohibiting the court from entering a declaratory judgment in certain instances; requiring the court to rescind its orders in certain instances; providing applicability; amending s. 760.26, F.S.; prohibiting discrimination in land use decisions and in permitting of development based on a development or proposed development being affordable housing; providing for waiver of sovereign immunity; limiting such waiver; providing a remedy; providing applicability; amending s. 479.01, F.S.; conforming a cross-reference; amending s. 1001.43, F.S.; requiring district school boards to exercise specified supplemental powers and duties as it related to affordable housing; providing an effective date.

Be It Enacted by the Legislature of the State of Florida:

Section 1. Subsections (6), (7), and (8) of section 125.01055, Florida Statutes, are amended, and subsections (9) through (12) are added to that section, to read:

125.01055 Affordable housing.—

(6)(a) Notwithstanding any other law or local ordinance or

regulation to the contrary, the board of county commissioners may approve the development of housing that is affordable, as defined in s. 420.0004, including, but not limited to, a mixed-use residential development, on any parcel zoned for commercial or industrial use if~~, so long as~~ at least 10 percent of the units included in the project are for housing that is affordable.

(b) The board of county commissioners shall approve the development of housing that is affordable if the following requirements are met:

1. The owner of the parcel is a religious institution as defined in s. 170.201(2).

2. At least 40 percent of the residential units included in the development are for housing that is affordable and the project has an affordability period of at least 30 years.

3. The parcel is not located within 500 feet of a military installation, as identified in s. 163.3175(2), or within a commercial service airport as defined in s. 332.0075(1).

4. State and local laws and regulations, other than land use or zoning regulations, apply to the parcel.

(c) ~~The provisions of~~ This subsection is ~~are~~ self-executing and does ~~do~~ not require the board of county commissioners to adopt an ordinance or a regulation before using the approval process in this subsection.

(7)(a) As used in this subsection, regardless of

terminology used in a county's land development regulations, the term:

1. "Allowable use" means the intended uses identified in a county's land development regulations which are authorized within a zoning category as a use by right, without the requirement to obtain a variance or waiver. The term does not include uses that are accessory, ancillary, or incidental to the allowable uses or allowed only on a temporary basis.

2. "Commercial use" means activities associated with the sale, rental, or distribution of products or the sale or performance of services. The term includes, but is not limited to, retail, office, entertainment, and other for-profit business activities.

3. "Industrial use" means activities associated with the manufacture, assembly, processing, or storage of products or the performance of related services.

4. "Planned unit development" has the same meaning as in s. 163.3202(5)(b).

(b)1.~~(a)~~ Notwithstanding any other law, local ordinance, or regulation to the contrary, including any local moratorium established after March 29, 2023, a county must authorize multifamily and mixed-use residential as allowable uses on any site owned by the county, a district school board, a religious institution as defined in s. 170.201(2), and in any area zoned for commercial, industrial, or mixed use, any planned unit

development permitted for commercial, industrial, or mixed use, or any zoning district not zoned solely for use as a single-family home or duplex, if at least 40 percent of the residential units in a proposed multifamily or mixed-use residential development are rental units that, for a period of at least 30 years, are affordable as defined in s. 420.0004(3) ~~s. 420.0004~~. A county shall authorize the inclusion of an adjacent parcel of land as part of the multifamily development, regardless of the land use designation of the adjacent parcel, if the residential units to be built on the adjacent parcel comply with the requirements of this subsection.

2. Notwithstanding any other law, local ordinance, or regulation to the contrary, a county may not require a proposed multifamily or mixed-use residential development to obtain an amendment to a development of regional impact, amendment to a development agreement, or amendment to a restrictive covenant or a zoning or land use change, special exception, conditional use approval, variance, or comprehensive plan amendment for the building height, zoning, and densities authorized under this subsection.

3. For mixed-use residential projects, at least 65 percent of the total square footage must be used for residential purposes. A county may not require more than 10 percent of the total square footage to be used for nonresidential purposes.

4. Notwithstanding any local land development regulation

categorization or title, areas zoned for mixed use shall be defined as areas that include both residential and nonresidential uses, regardless of whether the residential or nonresidential uses are permitted as principal use, conditional use, ancillary use, special use, unusual use, accessory use, planned unit development, or planned development. Nonresidential use includes, but is not limited to, retail, office, hotel, lodging, civic, institutional, parking, utilities, or other commercial uses.

5. Affordable or workforce units that receive any incentive under subsection (4) also qualify as affordable under this subsection as long as the units satisfy the requirements of s. 420.0004 and the local regulations.

(c) ~~(b)~~ A county may not directly restrict or have the effect of restricting the density of a proposed multifamily or mixed-use residential development authorized under this subsection below the highest ~~currently allowed~~ density allowed on or after July 1, 2023, on any unincorporated land in the county where residential development is allowed under the county's land development regulations. For purposes of this paragraph, the term "highest ~~currently allowed~~ density" does not include the density of any building that met the requirements of this subsection or the density of any building that has received any bonus, variance, or other special exception for density provided in the county's land development regulations as an

incentive for development.

(d) A county may not directly restrict or in effect restrict the maximum lot size of a proposed multifamily or mixed-use residential development authorized under this paragraph below the highest maximum lot size allowed on or after July 1, 2023, on any unincorporated land in the county where multifamily or mixed-use residential development is allowed pursuant to the county's land development regulations. A county may not restrict the maximum lot coverage of a proposed multifamily or mixed-use residential development authorized under this paragraph below 70 percent.

(e) ~~(c)~~ A county may not directly restrict or have the effect of restricting the floor area ratio of a proposed multifamily or mixed-use residential development authorized under this subsection below 150 percent of the highest ~~currently allowed~~ floor area ratio allowed on or after July 1, 2023, on any unincorporated land in the county where development is allowed under the county's land development regulations. For purposes of this paragraph, the term "highest ~~currently allowed~~ floor area ratio" does not include the floor area ratio of any building that met the requirements of this subsection or the floor area ratio of any building that has received any bonus, variance, or other special exception for floor area ratio provided in the county's land development regulations as an incentive for development. For purposes of this subsection, the

term "floor area ratio" includes floor lot ratio.

(f) ~~(d)~~1. A county may not directly restrict or have the effect of restricting the height of a proposed multifamily or mixed-use residential development authorized under this subsection below the highest ~~currently allowed~~ height allowed on or after July 1, 2023, for a commercial or residential building located in its jurisdiction within 1 mile of the proposed development or 3 stories, whichever is higher. For purposes of this paragraph, the term "highest ~~currently allowed~~ height" does not include the height of any building that met the requirements of this subsection or the height of any building that has received any bonus, variance, or other special exception for height provided in the county's land development regulations as an incentive for development.

2. If the proposed multifamily or mixed-use residential development is adjacent to, on two or more sides, a parcel zoned for single-family residential use which is within a single-family residential development with at least 25 contiguous single-family homes, the county may restrict the height of the proposed development to 150 percent of the tallest building on any property adjacent to the proposed development, the highest ~~currently allowed~~ height allowed on or after July 1, 2023, for the property provided in the county's land development regulations, or 3 stories, whichever is higher. For the purposes of this paragraph, the term "adjacent to" means those properties

sharing more than one point of a property line, but does not include properties separated by a public road.

(g)1. ~~(e)~~ A proposed multifamily or mixed-use residential development authorized under this subsection must be administratively approved and ~~no~~ further action by the board of county commissioners or any quasi-judicial board of the reviewing body is not authorized ~~required~~ if the development satisfies the county's land development regulations for multifamily and mixed-use residential developments in areas zoned for such use, density, intensity, and height, and is otherwise consistent with the comprehensive plan, with the exception of provisions establishing allowable densities, floor area ratios, height, and land use, including mixed use and minimum nonresidential or commercial floor area requirements. The removal or demolition of an existing structure to be performed as part of the proposed development must also be administratively approved. Such land development regulations include, but are not limited to, regulations relating to setbacks and parking requirements.

2. A county may not initiate or enforce zoning-in-progress or a building moratorium on a proposed development that is subject to this subsection and for which the county has approved the development's preliminary site plan.

3. A proposed development located within one-quarter mile of a military installation identified in s. 163.3175(2) may not

be administratively approved.

4. Each county shall maintain on its website a policy containing the zoning map and zoning regulations in effect on July 1, 2023, and the procedures and expectations for administrative approval pursuant to this subsection.

(h) ~~(f)~~1. A county must reduce ~~consider reducing~~ parking requirements by at least 20 percent for a proposed development authorized under this subsection, or by 100 percent for structures that are 20,000 square feet or less ~~if the development is located within one-quarter mile of a transit stop, as defined in the county's land development code, and the transit stop is accessible from the development~~.

2. A county must reduce parking requirements by at least 20 percent for a proposed development authorized under this subsection if the development:

a. Is located within one-half mile of a major transportation hub that is accessible from the proposed development by safe, pedestrian-friendly means, such as sidewalks, crosswalks, elevated pedestrian or bike paths, or other multimodal design features; or ~~and~~

b. Has available parking within 600 feet of the proposed development which may consist of options such as on-street parking, parking lots, or parking garages available for use by residents of the proposed development. However, a county may not require that the available parking compensate for the reduction

in parking requirements.

3. A county must eliminate parking requirements for a proposed mixed-use residential development authorized under this subsection within an area recognized by the county as a transit-oriented development or area, as provided in paragraph (j) ~~(h)~~.

4. For purposes of this paragraph, the term "major transportation hub" means any transit station, whether bus, train, or light rail, which is served by public transit with a mix of other transportation options.

(i) ~~(g)~~ For proposed multifamily developments in an unincorporated area zoned for commercial or industrial use which is within the boundaries of a multicounty independent special district that was created to provide municipal services and is not authorized to levy ad valorem taxes, and less than 20 percent of the land area within such district is designated for commercial or industrial use, a county must authorize, as provided in this subsection, such development only if the development is mixed-use residential.

(j) ~~(h)~~ A proposed development authorized under this subsection which is located within a transit-oriented development or area, as recognized by the county, must be mixed-use residential and otherwise comply with requirements of the county's regulations applicable to the transit-oriented development or area except for use, height, density, floor area ratio, and parking as provided in this subsection or as

otherwise agreed to by the county and the applicant for the development.

~~(i) Except as otherwise provided in this subsection, a development authorized under this subsection must comply with all applicable state and local laws and regulations.~~

(k) ~~(j)~~1. Nothing in this subsection precludes a county from granting a bonus, variance, conditional use, or other special exception for height, density, or floor area ratio in addition to the height, density, and floor area ratio requirements in this subsection.

2. Nothing in this subsection precludes a proposed development authorized under this subsection from receiving a bonus for density, height, or floor area ratio pursuant to an ordinance or regulation of the jurisdiction where the proposed development is located if the proposed development satisfies the conditions to receive the bonus except for any condition which conflicts with this subsection. If a proposed development qualifies for such bonus, the bonus must be administratively approved by the county and no further action by the board of county commissioners is required.

(l) A county shall approve a building permit plan review for a proposed development within 60 days as authorized under this subsection, and prioritize a building permit plan review for projects authorized under this subsection over other development projects.

(m) Notwithstanding s. 57.112(6), the prevailing party in a challenge under this subsection is entitled to recover attorney fees and costs, including reasonable appellate attorney fees and costs.

(n) ~~(k)~~ This subsection does not apply to:

1. Airport-impacted areas as provided in s. 333.03.

2. Property defined as recreational and commercial working waterfront in s. 342.201(2)(b) in any area zoned as industrial.

(o) If a county adopts an ordinance or resolution, or makes any other decision, and such ordinance, resolution, or decision has the effect, either directly or indirectly, of:

a. Limiting the height, floor area ratio, or density of a project under this section;

b. Unreasonably delaying the development or construction of a project under this section, including, but not limited to, imposing a moratorium;

c. Restricting the manner in which affordable units are developed or accessed within a project or regulating the types of units in the project; or

d. Restricting or limiting a project under this section in any other way,

then such ordinance, resolution, or decision shall be deemed preempted. If a property owner files a site plan application under this section with a county, the administrative review

process must be based only on the land development regulations in effect as of the date of filing the application.

(p) The regulation of affordable housing under this subsection is expressly preempted to the state. This subsection supersedes any local government ordinances, resolutions, or any other local regulations, including local moratoriums, on matters covered under this subsection.

(q) If an action is filed against a local government to challenge the adoption or enforcement of a local ordinance, resolution, or other local regulation on the grounds that it is expressly preempted by general law under this subsection, the court shall expedite the proceeding and render a decision within 30 days after service of process. Notice of appeal shall be filed and served within 30 days after the rendition of the judgment appealed from. The Supreme Court shall adopt rules by October 1, 2025, to ensure the proceedings are handled expeditiously and in a manner consistent with this subsection.

(r) ~~(1)~~ This subsection expires October 1, 2033.

(8) Any development authorized under paragraph (7)(b) ~~(7)(a)~~ must be treated as a conforming use even after the expiration of subsection (7) and the development's affordability period as provided in paragraph (7)(b) ~~(7)(a)~~, notwithstanding the county's comprehensive plan, future land use designation, or zoning. If at any point during the development's affordability period the development violates the affordability period

requirement provided in paragraph (7)(b) ~~(7)(a)~~, the development must be allowed a reasonable time to cure such violation. If the violation is not cured within a reasonable time, the development must be treated as a nonconforming use.

(9) A county's review or approval of an application for a development permit or development order may not be conditioned on the waiver, forbearance, or abandonment of any development right authorized by this section. Any such waiver, forbearance, or abandonment is void.

(10)(a) Beginning June 30, 2026, each county must provide an annual report to the state land planning agency that includes:

1. All litigation initiated under subsection (9), the status of the case, and, if applicable, the final disposition.

2. All actions the county has taken on any proposed project under this section, including, at minimum, the project size, density, and intensity, and the number of units and the number of affordable units for such proposed project.

3. For any proposed development that is denied or not accepted, all actions the county has taken on such proposed development and an explanation for why such actions were taken.

(b) The state land planning agency shall provide an annual report to the Governor, the President of the Senate, and the Speaker of the House of Representatives regarding county compliance with this section.

(11)(a) A county may not impose a building moratorium that has the effect of delaying the permitting of construction of a multifamily project that would otherwise qualify for:

1. An affordable housing ad valorem tax exemption under s. 196.1978 or s. 196.1979.

2. Any grant loan or other incentive provided for the development of affordable housing under chapter 420.

3. Any abatement of development restrictions under subsection (7).

(b) The property owner of a multifamily project described in paragraph (a), which is adversely affected by a building moratorium imposed in violation of this subsection, has a cause of action against the county. If the court finds that a county has violated this subsection, it may provide injunctive relief, compensatory damages, and reasonable attorney fees and costs, not to exceed $100,000, to a prevailing plaintiff. For purposes of this paragraph, the term "reasonable attorney fees and costs" means the reasonable and necessary attorney fees and costs incurred for all preparations, motions, hearings, trials, and appeals in a proceeding. The term does not include any attorney fees or costs directly incurred by or associated with litigation to determine an award of reasonable attorney fees or costs.

(12) If the owner of an administratively approved proposed development has acted in reliance on that approval, the owner has a vested right to proceed with development under the

relevant laws, regulations, and ordinances at the time such rights vested, if the property continues to comply with the requirements of this section.

Section 2. Subsection (11) of section 163.31801, Florida Statutes, is amended to read:

163.31801 Impact fees; short title; intent; minimum requirements; audits; challenges.—

(11)(a) A county, municipality, or special district may provide an exception or waiver for an impact fee for the development or construction of housing that is affordable, as defined in s. 420.9071. If a county, municipality, or special district provides such an exception or waiver, it is not required to use any revenues to offset the impact.

(b) Qualified developments authorized pursuant to s. 125.01055 or s. 166.04151 shall receive an exception or waiver for 20 percent of the impact fees for the development of, or construction of the portion of the development that is, affordable housing.

Section 3. Subsection (2) of section 166.041, Florida Statutes, is amended to read:

166.041 Procedures for adoption of ordinances and resolutions.—

(2)(a) Each ordinance or resolution shall be introduced in writing and shall embrace but one subject and matters properly connected therewith. The subject shall be clearly stated in the

title. No ordinance shall be revised or amended by reference to its title only. Ordinances to revise or amend shall set out in full the revised or amended act or section or subsection or paragraph of a section or subsection.

(b) A resolution, the subject of which designates the character of privately owned property as a historic landmark without the consent of the property owner, shall require a finding by the governing body, based on substantial competent evidence, that the historic significance of the subject property is commensurate, to an equal or greater degree, with property that is already designated as a historic landmark within the municipality.

Section 4. Subsections (6), (7), and (8) of section 166.04151, Florida Statutes, are amended, and subsections (9) through (12) are added to that section, to read:

166.04151 Affordable housing.—

(6)(a) Notwithstanding any other law or local ordinance or regulation to the contrary, the governing body of a municipality may approve the development of housing that is affordable, as defined in s. 420.0004, including, but not limited to, a mixed-use residential development, on any parcel zoned for commercial or industrial use if~~, so long as~~ at least 10 percent of the units included in the project are for housing that is affordable.

(b) The governing body shall approve the development of

housing that is affordable if the following requirements are met:

1. The owner of the parcel is a religious institution as defined in s. 170.201(2).

2. At least 40 percent of the residential units included in the development are for housing that is affordable and the project has an affordability period of at least 30 years.

3. The parcel is not located within 500 feet of a military installation, as identified in s. 163.3175(2), or within a commercial service airport as defined in s. 332.0075(1).

4. State and local laws and regulations, other than land use or zoning regulations, apply to the parcel.

(c) ~~The provisions of~~ This subsection is ~~are~~ self-executing and does ~~do~~ not require the governing body to adopt an ordinance or a regulation before using the approval process in this subsection.

(7)(a) As used in this subsection, regardless of terminology used in a municipality's land development regulations, the term:

1. "Allowable use" means the intended uses identified in a municipality's land development regulations which are authorized within a zoning category as a use by right, without the requirement to obtain a variance or waiver. The term does not include uses that are accessory, ancillary, or incidental to the allowable uses or allowed only on a temporary basis.

2. "Commercial use" means activities associated with the sale, rental, or distribution of products or the sale or performance of services. The term includes, but is not limited to, retail, office, entertainment, and other for-profit business activities.

3. "Industrial use" means activities associated with the manufacture, assembly, processing, or storage of products or the performance of related services.

4. "Planned unit development" has the same meaning as in s. 163.3202(5)(b).

(b)1.~~(a)~~ Notwithstanding any other law, local ordinance, or regulation to the contrary, including any local moratorium established after March 29, 2023, a municipality must authorize multifamily and mixed-use residential as allowable uses on any site owned by the municipality, a district school board, a religious institution as defined in s. 170.201(2), and in any area zoned for commercial, industrial, or mixed use, any planned unit development permitted for commercial, industrial, or mixed use, or in any zoning district not zoned solely for use as a single-family home or duplex, if at least 40 percent of the residential units in a proposed multifamily or mixed-use residential development are rental units that, for a period of at least 30 years, are affordable as defined in s. 420.0004(3) ~~s. 420.0004~~. A municipality shall authorize the inclusion of an adjacent parcel of land as part of the multifamily development,

regardless of the land use designation of the adjacent parcel, if the residential units to be built on the adjacent parcel comply with the requirements of this subsection.

2. Notwithstanding any other law, local ordinance, or regulation to the contrary, a municipality may not require a proposed multifamily or mixed-use residential development to obtain an amendment to a development of regional impact, amendment to a development agreement, or amendment to a restrictive covenant or a zoning or land use change, special exception, conditional use approval, variance, or comprehensive plan amendment for the building height, zoning, and densities authorized under this subsection.

3. For mixed-use residential projects, at least 65 percent of the total square footage must be used for residential purposes. A municipality may not require more than 10 percent of the total square footage to be used for nonresidential purposes.

4. Notwithstanding any local land development regulation categorization or title, areas zoned for mixed use shall be defined as areas that include both residential and nonresidential uses, regardless of whether the residential or nonresidential uses are permitted as principal use, conditional use, ancillary use, special use, unusual use, accessory use, planned unit development, or planned development. Nonresidential use includes, but is not limited to, retail, office, hotel, lodging, civic, institutional, parking, utilities, or other

commercial uses.

5. Affordable or workforce units that receive any incentive under subsection (4) also qualify as affordable under this subsection as long as the units satisfy the requirements of s. 420.0004 and the local regulations.

(c) ~~(b)~~ A municipality may not directly restrict or have the effect of restricting the density of a proposed multifamily or mixed-use residential development authorized under this subsection below the highest ~~currently allowed~~ density allowed on or after July 1, 2023, on any land in the municipality where residential development is allowed under the municipality's land development regulations. For purposes of this paragraph, the term "highest ~~currently allowed~~ density" does not include the density of any building that met the requirements of this subsection or the density of any building that has received any bonus, variance, or other special exception for density provided in the municipality's land development regulations as an incentive for development.

(d) A municipality may not directly restrict or have the effect of restricting the maximum lot size of a proposed multifamily or mixed-use residential development authorized under this paragraph below the highest maximum lot size allowed on or after July 1, 2023, on any unincorporated land in the municipality where multifamily or mixed-use residential development is allowed pursuant to the municipality's land

development regulations. A municipality may not restrict the maximum lot coverage of a proposed multifamily or mixed-use residential development authorized under this paragraph below 70 percent.

(e) ~~(c)~~ A municipality may not directly restrict or have the effect of restricting the floor area ratio of a proposed multifamily or mixed-use residential development authorized under this subsection below 150 percent of the highest ~~currently allowed~~ floor area ratio allowed on or after July 1, 2023, on any land in the municipality where development is allowed under the municipality's land development regulations. For purposes of this paragraph, the term "highest ~~currently allowed~~ floor area ratio" does not include the floor area ratio of any building that met the requirements of this subsection or the floor area ratio of any building that has received any bonus, variance, or other special exception for floor area ratio provided in the municipality's land development regulations as an incentive for development. For purposes of this subsection, the term "floor area ratio" includes floor lot ratio.

(f) ~~(d)~~ 1. A municipality may not directly restrict or have the effect of restricting the height of a proposed multifamily or mixed-use residential development authorized under this subsection below the highest ~~currently allowed~~ height allowed on or after July 1, 2023, for a commercial or residential building located in its jurisdiction within 1 mile of the proposed

development or 3 stories, whichever is higher. For purposes of this paragraph, the term "highest ~~currently allowed~~ height" does not include the height of any building that met the requirements of this subsection or the height of any building that has received any bonus, variance, or other special exception for height provided in the municipality's land development regulations as an incentive for development.

2. If the proposed multifamily or mixed-use residential development is adjacent to, on two or more sides, a parcel zoned for single-family residential use that is within a single-family residential development with at least 25 contiguous single-family homes, the municipality may restrict the height of the proposed development to 150 percent of the tallest building on any property adjacent to the proposed development, the highest ~~currently allowed~~ height allowed on or after July 1, 2023, for the property provided in the municipality's land development regulations, or 3 stories, whichever is higher. For the purposes of this paragraph, the term "adjacent to" means those properties sharing more than one point of a property line, but does not include properties separated by a public road.

(g)1.~~(e)~~ A proposed multifamily or mixed-use residential development authorized under this subsection must be administratively approved and public hearings or ~~no~~ further action by the governing body of the municipality or any quasi-judicial board of the reviewing body is not authorized ~~required~~

if the development satisfies the municipality's land development regulations for multifamily and mixed-use residential developments in areas zoned for such use, density, intensity, and height, and is otherwise consistent with the comprehensive plan, with the exception of provisions establishing allowable densities, floor area ratios, height, and land use, including mixed use and minimum nonresidential or commercial floor area requirements. The removal or demolition of an existing structure to be performed as part of the proposed development must also be administratively approved. ~~Such land development regulations include, but are not limited to, regulations relating to setbacks and parking requirements.~~

2. A municipality may not initiate or enforce zoning-in-progress or a building moratorium on a proposed development that is subject to this subsection and for which the municipality has approved the development's preliminary site plan.

3. A proposed development located within one-quarter mile of a military installation identified in s. 163.3175(2) may not be administratively approved.

4. Each municipality shall maintain on its website a policy containing the zoning map and zoning regulations in effect on July 1, 2023, and the procedures and expectations for administrative approval pursuant to this subsection.

(h) ~~(f)~~1. A municipality must reduce ~~consider reducing~~ parking requirements by at least 20 percent for a proposed

development authorized under this subsection, or by 100 percent for structures that are 20,000 square feet or less ~~if the development is located within one-quarter mile of a transit stop, as defined in the municipality's land development code, and the transit stop is accessible from the development~~.

2. A municipality must reduce parking requirements by at least 20 percent for a proposed development authorized under this subsection if the development:

a. Is located within one-half mile of a major transportation hub that is accessible from the proposed development by safe, pedestrian-friendly means, such as sidewalks, crosswalks, elevated pedestrian or bike paths, or other multimodal design features; or~~.~~

b. Has available parking within 600 feet of the proposed development which may consist of options such as on-street parking, parking lots, or parking garages available for use by residents of the proposed development. However, a municipality may not require that the available parking compensate for the reduction in parking requirements.

3. A municipality must eliminate parking requirements for a proposed mixed-use residential development authorized under this subsection within an area recognized by the municipality as a transit-oriented development or area, as provided in paragraph (j) ~~(h)~~.

4. For purposes of this paragraph, the term "major

transportation hub" means any transit station, whether bus, train, or light rail, which is served by public transit with a mix of other transportation options.

(i) ~~(g)~~ A municipality that designates less than 20 percent of the land area within its jurisdiction for commercial or industrial use must authorize a proposed multifamily development as provided in this subsection in areas zoned for commercial or industrial use only if the proposed multifamily development is mixed-use residential.

(j) ~~(h)~~ A proposed development authorized under this subsection which is located within a transit-oriented development or area, as recognized by the municipality, must be mixed-use residential and otherwise comply with requirements of the municipality's regulations applicable to the transit-oriented development or area except for use, height, density, floor area ratio, and parking as provided in this subsection or as otherwise agreed to by the municipality and the applicant for the development.

~~(i) Except as otherwise provided in this subsection, a development authorized under this subsection must comply with all applicable state and local laws and regulations.~~

(k) ~~(j)~~1. Nothing in this subsection precludes a municipality from granting a bonus, variance, conditional use, or other special exception to height, density, or floor area ratio in addition to the height, density, and floor area ratio

requirements in this subsection.

2. Nothing in this subsection precludes a proposed development authorized under this subsection from receiving a bonus for density, height, or floor area ratio pursuant to an ordinance or regulation of the jurisdiction where the proposed development is located if the proposed development satisfies the conditions to receive the bonus except for any condition which conflicts with this subsection. If a proposed development qualifies for such bonus, the bonus must be administratively approved by the municipality and no further action by the governing body of the municipality is required.

(l) A municipality shall approve building permit plan review for a proposed development within 60 days authorized under this subsection, and prioritize building permit plan review for projects authorized under this subsection over other development projects.

(m) Notwithstanding s. 57.112(6), the prevailing party in a challenge under this subsection is entitled to recover attorney fees and costs, including reasonable appellate attorney fees and costs.

(n) ~~(k)~~ This subsection does not apply to:

1. Airport-impacted areas as provided in s. 333.03.

2. Property defined as recreational and commercial working waterfront in s. 342.201(2)(b) in any area zoned as industrial.

(o) After July 1, 2023, if a municipality adopts an

ordinance or resolution, or makes any other decision, and such ordinance, resolution, or decision has the effect, either directly or indirectly, of:

a. Limiting the height, floor area ratio, or density of a project under this section;

b. Unreasonably delaying the development or construction of a project under this section, including, but not limited to, imposing a moratorium;

c. Restricting the manner in which affordable units are developed or accessed within a project or regulating the types of units in the project; or

d. Restricting or limiting a project under this section in any other way,

then such ordinance, resolution, or decision shall be deemed preempted. If a property owner files a site plan application under this section with a municipality, the administrative review process must be based only on the land development regulations in effect as of the date of filing the application.

(p) The regulation of affordable housing under this subsection is expressly preempted to the state. This subsection supersedes any local government ordinances, resolutions, or any other local regulations, including local moratoriums, on matters covered under this subsection.

(q) If an action is filed against a local government to

challenge the adoption or enforcement of a local ordinance, resolution, or other local regulation on the grounds that it is expressly preempted by general law under this subsection, the court shall expedite the proceeding and render a decision within 30 days after service of process. Notice of appeal shall be filed and served within 30 days from the rendition of the judgment appealed from. The Supreme Court shall adopt rules by October 1, 2025, to ensure the proceedings are handled expeditiously and in a manner consistent with this subsection.

(r) ~~(1)~~ This subsection expires October 1, 2033.

(8) Any development authorized under paragraph (7)(b) ~~(7)(a)~~ must be treated as a conforming use even after the expiration of subsection (7) and the development's affordability period as provided in paragraph (7)(b) ~~(7)(a)~~, notwithstanding the municipality's comprehensive plan, future land use designation, or zoning. If at any point during the development's affordability period the development violates the affordability period requirement provided in paragraph (7)(b) ~~(7)(a)~~, the development must be allowed a reasonable time to cure such violation. If the violation is not cured within a reasonable time, the development must be treated as a nonconforming use.

(9) A municipality's review or approval of an application for a development permit or development order may not be conditioned on the waiver, forbearance, or abandonment of any development right authorized by this section. Any such waiver,

forbearance, or abandonment is void.

(10)(a) Beginning June 30, 2026, each municipality must provide an annual report to the state land planning agency that includes:

1. All litigation initiated under subsection (9), the status of the case, and, if applicable, the final disposition.

2. All actions the municipality has taken on any proposed project under this section, including, at minimum, the project size, density, and intensity, and the number of units and the number of affordable units for such proposed project.

3. For any proposed development that is denied or not accepted, all actions the municipality has taken relating to such proposed development and an explanation for why such actions were taken.

(b) The state land planning agency shall provide an annual report to the Governor, the President of the Senate, and the Speaker of the House of Representatives regarding municipal compliance with this section.

(11)(a) A municipality may not impose a building moratorium that has the effect of delaying the permitting of construction of a multifamily project that would otherwise qualify for:

1. An affordable housing ad valorem tax exemption under s. 196.1978 or s. 196.1979.

2. Any grant loan or other incentive provided for the

development of affordable housing under chapter 420.

3. Any abatement of development restrictions under subsection (7).

(b) The property owner of a multifamily project described in paragraph (a), which is adversely affected by a building moratorium imposed in violation of this subsection, has a cause of action against the municipality. If the court finds that a municipality has violated this subsection, it may provide injunctive relief, compensatory damages, and reasonable attorney fees and costs, not to exceed $100,000, to a prevailing plaintiff. For purposes of this paragraph, the term "reasonable attorney fees and costs" means the reasonable and necessary attorney fees and costs incurred for all preparations, motions, hearings, trials, and appeals in a proceeding. The term does not include any attorney fees or costs directly incurred by or associated with litigation to determine an award of reasonable attorney fees or costs.

(12) If the owner of an administratively approved proposed development has acted in reliance on that approval, the owner has a vested right to proceed with development under the relevant laws, regulations, and ordinances at the time such rights vested, if the property continues to comply with the requirements of this section.

Section 5. Subsection (7) is added to section 163.2517, Florida Statutes, to read:

163.2517 Designation of urban infill and redevelopment area.—

(7) Notwithstanding any ordinance to the contrary existing on July 1, 2025, a proposed urban infill development must be administratively approved, and a comprehensive plan amendment, rezoning, or variance is not required.

Section 6. Subsections (9) and (53) of section 163.3164, Florida Statutes, are amended to read:

163.3164 Community Planning Act; definitions.—As used in this act:

(9) "Compatibility" means a condition in which land uses or conditions can coexist in relative proximity to each other in a stable fashion over time such that no use or condition is unduly negatively impacted directly or indirectly by another use or condition. All residential land use categories are deemed to be compatible with each other.

(53) "Urban service area" means areas in which ~~identified in the comprehensive plan where~~ public facilities and services, including, but not limited to, central water and sewer capacity and roads, are already in place or may be expanded by the ~~are identified in the capital improvements element. The term includes any areas identified in the comprehensive plan as urban service areas, regardless of~~ local government or the private sector as evidenced by an executed agreement with the local government to provide urban services within the local

government's 20-year planning period ~~limitation~~.

Section 7. Subsection (2) and paragraph (a) of subsection (6) of section 163.3177, Florida Statutes, are amended to read:

163.3177 Required and optional elements of comprehensive plan; studies and surveys.—

(2) Coordination of the required and optional ~~several~~ elements of the local comprehensive plan must ~~shall~~ be a major objective of the planning process. The required and optional ~~several~~ elements of the comprehensive plan must ~~shall~~ be consistent. Optional elements of the comprehensive plan may not contain policies that restrict the density or intensity established in the future land use element. Where data is relevant to required and optional ~~several~~ elements, consistent data must ~~shall~~ be used, including population estimates and projections ~~unless alternative data can be justified for a plan amendment through new supporting data and analysis~~. Each map depicting future conditions must reflect the principles, guidelines, and standards within all elements, and each such map must be contained within the comprehensive plan.

(6) In addition to the requirements of subsections (1)-(5), the comprehensive plan shall include the following elements:

(a) A future land use plan element designating proposed future general distribution, location, and extent of the uses of land for residential uses, commercial uses, industry,

agriculture, recreation, conservation, education, public facilities, and other categories of the public and private uses of land. The approximate acreage and the general range of density or intensity of use shall be provided for the gross land area included in each existing land use category. The element shall establish the long-term end toward which land use programs and activities are ultimately directed.

1. Each future land use category must be defined in terms of uses included, and must include standards to be followed in the control and distribution of population densities and building and structure intensities. The proposed distribution, location, and extent of the various categories of land use shall be shown on a land use map or map series which shall be supplemented by goals, policies, and measurable objectives.

2. The future land use plan and plan amendments shall be based upon surveys, studies, and data regarding the area, as applicable, including:

a. The amount of land required to accommodate anticipated growth.

b. The projected permanent and seasonal population of the area.

c. The character of undeveloped land.

d. The availability of water supplies, public facilities, and services.

e. The need for redevelopment, including the renewal of

blighted areas and the elimination of nonconforming uses which are inconsistent with the character of the community.

f. The compatibility of uses on lands adjacent to or closely proximate to military installations.

g. The compatibility of uses on lands adjacent to an airport as defined in s. 330.35 and consistent with s. 333.02.

h. The discouragement of urban sprawl.

i. The need for job creation, capital investment, and economic development that will strengthen and diversify the community's economy.

j. The need to modify land uses and development patterns within antiquated subdivisions.

3. The future land use plan element shall include criteria to be used to:

a. Achieve the compatibility of lands adjacent or closely proximate to military installations, considering factors identified in s. 163.3175(5).

b. Achieve the compatibility of lands adjacent to an airport as defined in s. 330.35 and consistent with s. 333.02.

c. Encourage preservation of recreational and commercial working waterfronts for water-dependent uses in coastal communities.

d. Encourage the location of schools proximate to urban residential areas to the extent possible.

e. Coordinate future land uses with the topography and

soil conditions, and the availability of facilities and services.

f. Ensure the protection of natural and historic resources.

g. Provide for the compatibility of adjacent land uses.

h. Provide guidelines for the implementation of mixed-use development including the types of uses allowed, the percentage distribution among the mix of uses, or other standards, and the density and intensity of each use.

4. The amount of land designated for future planned uses shall provide a balance of uses that foster vibrant, viable communities and economic development opportunities and address outdated development patterns, such as antiquated subdivisions. The amount of land designated for future land uses should allow the operation of real estate markets to provide adequate choices for permanent and seasonal residents and business and may not be limited solely by the projected population. The element shall accommodate at least the minimum amount of land required to accommodate the medium projections as published by the Office of Economic and Demographic Research for at least a 10-year planning period unless otherwise limited under s. 380.05, including related rules of the Administration Commission.

5. The future land use plan of a county may designate areas for possible future municipal incorporation.

6. The land use maps or map series shall generally

identify and depict historic district boundaries and shall designate historically significant properties meriting protection.

7. The future land use element must clearly identify the land use categories in which public schools are an allowable use. When delineating the land use categories in which public schools are an allowable use, a local government shall include in the categories sufficient land proximate to residential development to meet the projected needs for schools in coordination with public school boards and may establish differing criteria for schools of different type or size. Each local government shall include lands contiguous to existing school sites, to the maximum extent possible, within the land use categories in which public schools are an allowable use.

8. Future land use map amendments shall be based upon the following analyses:

a. An analysis of the availability of facilities and services.

b. An analysis of the suitability of the plan amendment for its proposed use considering the character of the undeveloped land, soils, topography, natural resources, and historic resources on site.

c. An analysis of the minimum amount of land needed to achieve the goals and requirements of this section.

9. The future land use element must ~~and any amendment to~~

~~the future land use element shall~~ discourage the proliferation of urban sprawl by planning for future development as provided in this section.

a. The primary indicators that a plan or plan amendment does not discourage the proliferation of urban sprawl are listed below. The evaluation of the presence of these indicators shall consist of an analysis of the plan or plan amendment within the context of features and characteristics unique to each locality in order to determine whether the plan or plan amendment:

(I) Promotes, allows, or designates for development substantial areas of the jurisdiction to develop as low-intensity, low-density, or single-use development or uses.

(II) Promotes, allows, or designates significant amounts of urban development to occur in rural areas at substantial distances from existing urban areas while not using undeveloped lands that are available and suitable for development.

(III) Promotes, allows, or designates urban development in radial, strip, isolated, or ribbon patterns generally emanating from existing urban developments.

(IV) Fails to adequately protect and conserve natural resources, such as wetlands, floodplains, native vegetation, environmentally sensitive areas, natural groundwater aquifer recharge areas, lakes, rivers, shorelines, beaches, bays, estuarine systems, and other significant natural systems.

(V) Fails to adequately protect adjacent agricultural

areas and activities, including silviculture, active agricultural and silvicultural activities, passive agricultural activities, and dormant, unique, and prime farmlands and soils.

(VI) Fails to maximize use of existing public facilities and services.

(VII) Fails to maximize use of future public facilities and services.

(VIII) Allows for land use patterns or timing which disproportionately increase the cost in time, money, and energy of providing and maintaining facilities and services, including roads, potable water, sanitary sewer, stormwater management, law enforcement, education, health care, fire and emergency response, and general government.

(IX) Fails to provide a clear separation between rural and urban uses.

(X) Discourages or inhibits infill development or the redevelopment of existing neighborhoods and communities.

(XI) Fails to encourage a functional mix of uses.

(XII) Results in poor accessibility among linked or related land uses.

(XIII) Results in the loss of significant amounts of functional open space.

b. The future land use element or plan amendment shall be determined to discourage the proliferation of urban sprawl if it incorporates a development pattern or urban form that achieves

four or more of the following:

(I) Directs or locates economic growth and associated land development to geographic areas of the community in a manner that does not have an adverse impact on and protects natural resources and ecosystems.

(II) Promotes the efficient and cost-effective provision or extension of public infrastructure and services.

(III) Promotes walkable and connected communities and provides for compact development and a mix of uses at densities and intensities that will support a range of housing choices and a multimodal transportation system, including pedestrian, bicycle, and transit, if available.

(IV) Promotes conservation of water and energy.

(V) Preserves agricultural areas and activities, including silviculture, and dormant, unique, and prime farmlands and soils.

(VI) Preserves open space and natural lands and provides for public open space and recreation needs.

(VII) Creates a balance of land uses based upon demands of the residential population for the nonresidential needs of an area.

(VIII) Provides uses, densities, and intensities of use and urban form that would remediate an existing or planned development pattern in the vicinity that constitutes sprawl or if it provides for an innovative development pattern such as

transit-oriented developments or new towns as defined in s. 163.3164.

10. The future land use element shall include a future land use map or map series.

a. The proposed distribution, extent, and location of the following uses shall be shown on the future land use map or map series:

(I) Residential.

(II) Commercial.

(III) Industrial.

(IV) Agricultural.

(V) Recreational.

(VI) Conservation.

(VII) Educational.

(VIII) Public.

b. The following areas shall also be shown on the future land use map or map series, if applicable:

(I) Historic district boundaries and designated historically significant properties.

(II) Transportation concurrency management area boundaries or transportation concurrency exception area boundaries.

(III) Multimodal transportation district boundaries.

(IV) Mixed-use categories.

c. The following natural resources or conditions shall be shown on the future land use map or map series, if applicable:

(I) Existing and planned public potable waterwells, cones of influence, and wellhead protection areas.

(II) Beaches and shores, including estuarine systems.

(III) Rivers, bays, lakes, floodplains, and harbors.

(IV) Wetlands.

(V) Minerals and soils.

(VI) Coastal high hazard areas.

Section 8. Paragraph (e) of subsection (8) of section 163.3167, Florida Statutes, is redesignated as paragraph (f), and paragraph (e) is added to that subsection, to read:

163.3167 Scope of act.—

(8)

(e) The approval of an increase in height or floor area ratio in the land development regulations by a local government, commission, council, or board shall be by ordinance with a simple majority vote. For purposes of this paragraph, the term "floor area ratio" includes floor lot area.

Section 9. Section 163.31771, Florida Statutes, is amended to read:

163.31771 Accessory dwelling units.—

(1) The Legislature finds that the median price of homes in this state has increased steadily over the last decade and at a greater rate of increase than the median income in many urban areas. The Legislature finds that the cost of rental housing has also increased steadily and the cost often exceeds an amount

that is affordable to extremely-low-income, very-low-income, low-income, or moderate-income persons and has resulted in a critical shortage of affordable rentals in many urban areas in the state. This shortage of affordable rentals constitutes a threat to the health, safety, and welfare of the residents of the state. Therefore, the Legislature finds that it serves an important public purpose to encourage the permitting of accessory dwelling units in single-family residential areas in order to increase the availability of affordable rentals for extremely-low-income, very-low-income, low-income, or moderate-income persons.

(2) As used in this section, the term:

(a) "Accessory dwelling unit" means an ancillary or secondary living unit, that has a separate kitchen, bathroom, and sleeping area, existing either within the same structure, or on the same lot, as the primary dwelling unit.

(b) "Affordable rental" means that monthly rent and utilities do not exceed 30 percent of that amount which represents the percentage of the median adjusted gross annual income for extremely-low-income, very-low-income, low-income, or moderate-income persons.

(c) "Department" means the Department of Commerce.

(d) ~~(g)~~ "Extremely-low-income persons" has the same meaning as in s. 420.0004(9).

(e) ~~(c)~~ "Local government" means a county or municipality.

(f) ~~(d)~~ "Low-income persons" has the same meaning as in s. 420.0004(11).

(g) ~~(e)~~ "Moderate-income persons" has the same meaning as in s. 420.0004(12).

(h) ~~(f)~~ "Very-low-income persons" has the same meaning as in s. 420.0004(17).

(3) A local government shall ~~may~~ adopt an ordinance to allow accessory dwelling units in any area zoned for single-family residential use. A local government may not directly, unreasonably increase, or in effect unreasonably increase, the cost to construct, in effect prohibit the construction of, or extinguish the ability to otherwise construct an accessory dwelling unit. Such regulation does not include:

(a) Restrictions on the terms of rentals that do not apply generally to other housing in the same district or zone.

(b) Parking requirements and minimum lot size requirements that do not apply general to other housing in the same district or zone, other lot design regulations that unreasonably increase the cost to construct or unreasonably extinguish the ability to construct an accessory dwelling unit on a lot.

(c) Discretionary conditional use permit procedures or standards that do not apply generally to other housing in the same district or zone.

~~(4) An application for a building permit to construct an accessory dwelling unit must include an affidavit from the~~

~~applicant which attests that the unit will be rented at an affordable rate to an extremely-low-income, very-low-income, low-income, or moderate-income person or persons.~~

(4) ~~(5)~~ Each accessory dwelling unit allowed by an ordinance adopted under this section applies ~~shall apply~~ toward satisfying the affordable housing component of the housing element in the local government's comprehensive plan under s. 163.3177(6)(f).

(5)(a) Beginning October 1, 2025, and by October 1 every year thereafter, the local government shall submit an annual report to the department, in a form and manner prescribed by the department, and post publicly on its website, the following information for the previous fiscal year:

1. The number of applications to construct new accessory dwelling units, the number of new accessory dwelling units that have been approved, and the number of new accessory dwelling units that have been denied, and the reason for denial.

2. The number of allowable accessory dwelling units located in the jurisdiction, the number of accessory dwelling units, attached or unattached, which are not allowed by an ordinance, and the number of single-family homes in a zoning district in which accessory dwelling units are allowed by an ordinance.

(b) The department may adopt rules to administer and enforce this subsection.

(6)(a) The owner of property with an accessory dwelling unit may not be denied a homestead exemption or homestead property assessment limitation solely on the basis of the property containing an accessory dwelling unit which may be rented.

(b) If the accessory dwelling unit is rented by the property owner:

1. The assessment of the accessory dwelling unit must be separated from the homestead property.

2. It may not be construed as an abandonment of the dwelling previously claimed to be a homestead under s. 196.061, provided such dwelling is physically occupied by the owner.

(c) If the accessory dwelling unit is not rented by the property owner, the assessment of the accessory dwelling unit must be considered part of the homestead property.

Section 10. Paragraphs (a) and (b) of subsection (1) of section 196.1979, Florida Statutes, are amended to read:

196.1979 County and municipal affordable housing property exemption.—

(1)(a) Notwithstanding ss. 196.195 and 196.196, the board of county commissioners of a county or the governing body of a municipality may adopt an ordinance to exempt those portions of property used to provide affordable housing meeting the requirements of this section. Such property is considered property used for a charitable purpose. To be eligible for the

exemption, the portions of property:

1. Must be used to house natural persons or families whose annual household income:

a. Is greater than 30 percent but not more than 60 percent of the median annual adjusted gross income for households within the metropolitan statistical area or, if not within a metropolitan statistical area, within the county where ~~in which~~ the person or family resides; or

b. Does not exceed 30 percent of the median annual adjusted gross income for households within the metropolitan statistical area or, if not within a metropolitan statistical area, within the county where ~~in which~~ the person or family resides.~~;~~

2.a. Must be within a multifamily project containing at least the minimum number of residential units as defined by the county or municipality that adopts an ordinance under this section; a county or municipality that adopts an ordinance under this section may set a minimum residential unit threshold that deems a property eligible for the exemption for properties that exceed 15,000 square feet, at a minimum of 5 units not to exceed a minimum of 50 residential units ~~50 or more residential units, at least 20 percent of which are used to provide affordable housing that meets the requirements of this section~~; or

b. Must be an accessory dwelling unit as defined in s. 163.31771(2).

3. Must be rented for an amount no greater than the amount as specified by the most recent multifamily rental programs income and rent limit chart posted by the corporation and derived from the Multifamily Tax Subsidy Projects Income Limits published by the United States Department of Housing and Urban Development or 90 percent of the fair market value rent as determined by a rental market study meeting the requirements of subsection (4), whichever is less.~~;~~

4. May not have been cited for code violations on three or more occasions in the 24 months before the submission of a tax exemption application.~~;~~

5. May not have any cited code violations that have not been properly remedied by the property owner before the submission of a tax exemption application.~~; and~~

6. May not have any unpaid fines or charges relating to the cited code violations. Payment of unpaid fines or charges before a final determination on a property's qualification for an exemption under this section will not exclude such property from eligibility if the property otherwise complies with all other requirements for the exemption.

(b) Qualified property may receive an ad valorem property tax exemption of:

1. Up to 75 percent of the assessed value of each residential unit used to provide affordable housing if fewer than 100 percent of the multifamily project's residential units

are used to provide affordable housing meeting the requirements of this section.

2. Up to 100 percent of the assessed value of each residential unit used to provide affordable housing if 100 percent of the multifamily project's residential units are used to provide affordable housing meeting the requirements of this section.

3. Up to 100 percent of the assessed value of the accessory dwelling unit if the unit is used to provide affordable housing meeting the requirements of this section.

Section 11. Paragraph (a) of subsection (5) of section 333.03, Florida Statutes, is amended to read:

333.03 Requirement to adopt airport zoning regulations.—

(5) Sections 125.01055(7) and 166.04151(7) do not apply to any of the following:

(a) A proposed development ~~near a runway~~ within one-quarter of a mile laterally from the runway edge and within an area that is the width of one-quarter of a mile extending at right angles from the end of the runway for a distance of 10,000 feet of any runway for an existing commercial service airport ~~runway~~ or planned commercial service airport runway identified in the local government's airport master plan. As used in this paragraph, the term "commercial service airport" has the same meaning as in s. 332.0075(1).

Section 12. Paragraph (d) of subsection (1) of section

420.50871, Florida Statutes, is amended, and paragraph (e) is added to subsection (1) of that section, to read:

420.50871 Allocation of increased revenues derived from amendments to s. 201.15 made by ch. 2023-17.—Funds that result from increased revenues to the State Housing Trust Fund derived from amendments made to s. 201.15 made by chapter 2023-17, Laws of Florida, must be used annually for projects under the State Apartment Incentive Loan Program under s. 420.5087 as set forth in this section, notwithstanding ss. 420.507(48) and (50) and 420.5087(1) and (3). The Legislature intends for these funds to provide for innovative projects that provide affordable and attainable housing for persons and families working, going to school, or living in this state. Projects approved under this section are intended to provide housing that is affordable as defined in s. 420.0004, notwithstanding the income limitations in s. 420.5087(2). Beginning in the 2023-2024 fiscal year and annually for 10 years thereafter:

(1) The corporation shall allocate 70 percent of the funds provided by this section to issue competitive requests for application for the affordable housing project purposes specified in this subsection. The corporation shall finance projects that:

(d) Provide housing near military installations and United States Department of Veterans Affairs medical centers or outpatient clinics in this state, with preference given to

projects that incorporate critical services for servicemembers, their families, and veterans, such as mental health treatment services, employment services, and assistance with transition from active-duty service to civilian life.

(e) Provide housing in areas of critical housing shortage for essential service and high-demand career employees through a public-private housing partnership agreement with major public and private sector employers for whom housing shortages are affecting recruitment and retention of workers. Private sector employers shall provide land and financial support for the housing projects. Housing may not be exclusive to any specific employee group.

Section 13. Section 702.13, Florida Statutes, is created to read:

702.13 Expedited foreclosure proceedings for abandoned real property.-

(1) As used in this section, the term:

(a) "Abandoned real property" means residential real property that a homeowner does not continue to occupancy or use, and at least three of the following indications of abandonment are met:

1. Furnishings and personal items consistent with residential occupancy are not present on the property;

2. Public utility services, such as gas, electric, or water utilities, are disconnected;

3. Windows on the property are boarded up or closed off; smashed, broken, or unhinged; or window panes are broken and unrepaired;

4. Statements are provided by neighbors, delivery agents, or government employees that the property is vacant;

5. Doors on the property are substantially damaged, broken, unhinged, or conspicuously open;

6. The property is stripped of copper or any other nonferrous metal, including, but not limited to, copper, copper alloy, brass, aluminum, bronze, lead, zinc, nickel, and alloys thereof, or any interior fixtures are removed;

7. At least one report has been received by law enforcement officials of trespassing, vandalism, or other illegal activity on the property within the immediately preceding 6 months;

8. The property has been declared unfit for occupancy and ordered to remain vacant and unoccupied under an order issued by a municipal authority or county authority, or by a court of competent jurisdiction;

9. Construction has been initiated on the property but is discontinued before completion, leaving the property unsuitable for occupancy, and construction has not taken place for at least 12 months;

10. Newspapers, circulars, flyers, or mail has accumulated on the property or the United States Postal Service has

discontinued delivery to the property;

11. Rubbish, trash, debris, neglected vegetation, or natural overgrowth has accumulated on the property;

12. Hazardous, noxious, or unhealthy substances or materials have accumulated on the property;

13. The homeowner or a representative for the property cannot be reached after a credible attempt to communicate; or

14. Other credible indications exist indicating that the homeowner has vacated and abandoned the property.

(b) "Claimant" means a person or entity claiming a legal right to initiate a foreclosure action, including:

1. A mortgagee as defined in s. 701.041.

2. A tax lienholder or a tax certificate holder pursuant to chapter 197.

3. A homeowners' association or a condominium association enforcing a lien pursuant to s. 718.116 or s. 720.3085.

4. A county, municipality, or other governmental entity enforcing a lien for:

a. Code violations pursuant to chapter 162.

b. Utility services pursuant to chapter 159 or local ordinance.

c. Environmental cleanup pursuant to chapters 376 and 403.

d. Special assessments pursuant to chapters 170 and 197.

5. A mechanic or laborer enforcing a lien under part II of chapter 713.

6. A judgment lienholder pursuant to chapter 55.

7. State tax authorities enforcing a lien pursuant to s. 213.758 or s. 192.091, including a lien for unpaid taxes administered by the Florida Department of Revenue.

8. Special districts, including, but not limited to, Community Development Districts, enforcing a lien pursuant to chapters 189 and 190.

9. Other governmental or quasi-governmental entities, including water management districts and public hospital boards, enforcing a lien pursuant to s. 373.503 or s. 154.02.

10. A lienholder authorized to request an order to show cause for the entry of final judgment in a foreclosure action pursuant to s. 702.10.

11. Any other person or entity authorized by general law to initiate a foreclosure action or enforce a lien against real property.

(c) "Delinquent party" means the person or entity against whom a foreclosure action has been initiated, including, but not limited to, a person or entity in arrears or default under the terms of a lien, a mortgage, or any other obligation.

(d) "Mortgagor" has the same meaning as in s. 701.041(1)(d).

(e) "Real property" has the same meaning as in s. 475.801.

(2)(a) In a foreclosure proceeding under this chapter involving residential real property, the claimant may file a

motion with the trial court for a judicial determination that the residential real property is abandoned real property. The claimant must file a sworn affidavit with the trial court attesting that the residential real property is "abandoned real property," as defined in subsection (1), and any other relevant documentation, including photographic documentation.

(b) Upon filing of the motion, the trial court shall set the date and time for a hearing on the motion, which must be conducted at least 15 days but no more than 25 days after the filing of the motion.

(3)(a) The claimant shall give written notice to the homeowner and to each known delinquent party. Notice shall be promptly delivered or sent pursuant to s. 715.104(3) to the last known mailing address of the homeowner and to each known delinquent party. In addition, notice shall be sent to the last known e-mail address of the homeowner and to each known delinquent party, and shall be given by telephone communication to the last known telephone number of the homeowner and each known delinquent party. Notice under this paragraph must include the following information:

1. State that a motion has been filed with the trial court to make a judicial determination as to whether the residential real property is abandoned real property and that a hearing regarding the motion has been set.

2. State the contact information of the trial court to

which the motion was filed and the date and location of the hearing on the motion.

3. State the definition of abandoned real property pursuant to subsection (1).

4. State the possible outcomes if the court makes a judicial determination that the residential real property is abandoned real property, including the possibility of an expeditious foreclosure on the property.

5. State that the homeowner or delinquent party has the right to file an affidavit attesting to legal residence at the property, or any other documentation of legal residence at the property, at the time of the hearing and may appear personally or by way of an attorney at the hearing.

6. State that a mortgagor, lawful occupant, or adverse possessor of the residential real property under s. 95.18 may contact the trial court for information about the motion and hearing or to object on the record to the motion.

7. Provide copies of the motion and any documentation in support of the motion, including photographic and other relevant documentation.

(b) The claimant shall conspicuously post on the residential real property a notice printed in at least 12-point uppercase and boldfaced type. The notice must state the information in paragraph (a)1.-6. The claimant shall file with the trial court photographic documentation of compliance with

this paragraph after posting the notice on the residential real property.

(4)(a) At the hearing on the motion, if the trial court finds by a preponderance of the evidence that the residential real property is abandoned real property, the court shall render a declaratory judgment in favor of the claimant and immediately proceed to a trial of foreclosure pursuant to this chapter.

(b) If the trial court finds at the foreclosure trial that the abandoned real property meets all requirements necessary to enter a judgement of foreclosure pursuant to s. 702.036, the court must promptly order the clerk to schedule a public sale of the abandoned real property pursuant to s. 45.031.

(5)(a) If a mortgagor, a lawful occupant, or a person claiming adverse possession pursuant to s. 95.18 objects to the trial court's judicial determination under subsection(4)(a) and submits the appropriate documentation with the court, the court may not enter a declaratory judgment in favor of the claimant.

(b) If, before the sale of the abandoned real property pursuant to subsection (4)(b), a mortgagor, a lawful occupant, or a person claiming adverse possession pursuant to s. 95.18 presents sufficient evidence to the court that the property is not abandoned real property, the court shall rescind the orders it issued pursuant to subsection (4)(a) and (b).

(6)(a) This section applies to residential real property that is abandoned. Residential real property is abandoned if:

1. The homeowner or delinquent party delivers a written, signed statement declaring the residential real property to be abandoned; or

2. The residential real property is considered "abandoned real property," as defined in subsection (1).

(b) This section does not apply to residential real property that is:

1. Subject to an action to quiet title pursuant to s. 65.011, s. 65.021, s. 65.061, or s. 65.071.

2. Subject to a probate action pursuant to chapter 733.

3. The subject of any other litigation where the ownership of the property is actively disputed.

4. An unoccupied dwelling or building undergoing construction, renovation, or any other manner of rehabilitation, which complies with all applicable state and local permitting requirements and regulations.

Section 14. Section 760.26, Florida Statutes, is amended to read:

760.26 Prohibited discrimination in land use decisions and in permitting of development.—

(1) It is unlawful to discriminate in land use decisions or in the permitting of development based on race, color, national origin, sex, disability, familial status, religion, or, except as otherwise provided by law, the source of financing of a development or proposed development or based on the

development or proposed development being affordable housing as defined under s. 420.0004(3).

(2) To ensure that courts may assess damages for claims filed under this section in accordance with s. 13, Art. X of the State Constitution, the state, for itself and its agencies or political subdivisions, waives sovereign immunity for causes of action based on the application of this section. Such waiver is limited only to actions brought under this section. A violation of this section may be remedied as provided by s. 760.35.

Section 15. It is the intent of the Legislature that the amendment to s. 760.26, Florida Statutes, is remedial and clarifying in nature, and shall apply retroactively for any causes of action filed on or before the effective date of the passage of this act.

Section 16. Subsection (29) of section 479.01, Florida Statutes, is amended to read:

479.01 Definitions.—As used in this chapter, the term:

(29) "Zoning category" means the designation under the land development regulations or other similar ordinance enacted to regulate the use of land as provided in s. 163.3202(2)(c) ~~s. 163.3202(2)(b)~~, which designation sets forth the allowable uses, restrictions, and limitations on use applicable to properties within the category.

Section 17. Subsection (12) of section 1001.43, Florida Statutes, is amended to read:

1001.43 Supplemental powers and duties of district school board.—The district school board shall ~~may~~ exercise the following supplemental powers and duties as authorized by this code or State Board of Education rule.

(12) AFFORDABLE HOUSING.—

(a) A district school board shall ~~may~~ use portions of school sites purchased within the guidelines of the State Requirements for Educational Facilities, land deemed not usable for educational purposes because of location or other factors, or land declared as surplus by the board ~~to provide sites for affordable housing for teachers and other district personnel and, in areas of critical state concern, for other essential services personnel as defined by local affordable housing eligibility requirements, independently or in conjunction with other agencies as described in subsection (5)~~.

(b) Each district school board shall adopt best practices for surplus land programs, including, but not limited to:

1. Establishing eligibility criteria for the receipt or purchase of surplus land by developers.

2. Making the process for requesting surplus lands publicly available.

3. Ensuring long-term affordability through ground leases by retaining the right of first refusal to purchase property that would be sold or offered at market rate and by requiring reversion of property not used for affordable housing within a

certain timeframe.

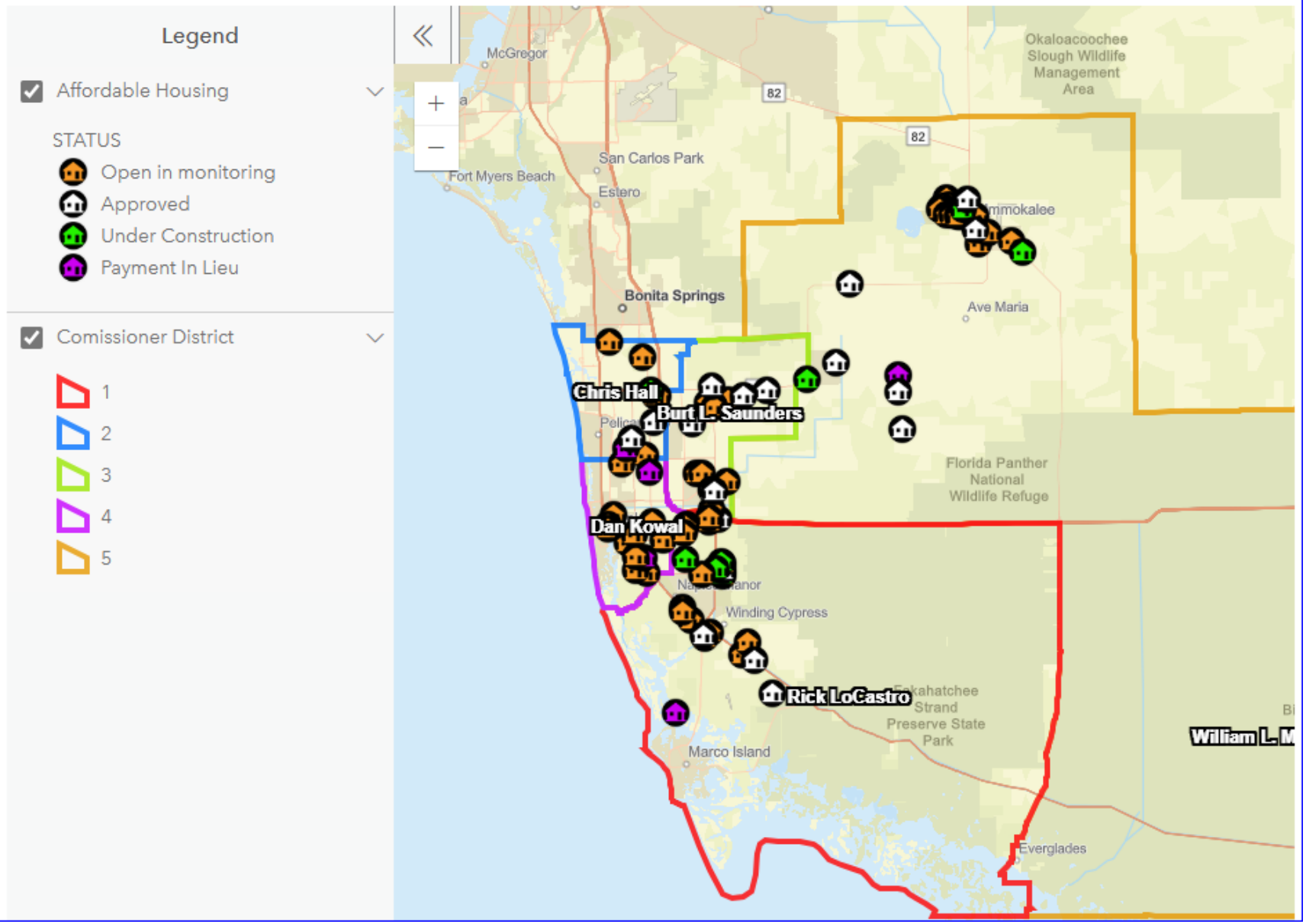
4. Each district school board's most recent and all future educational plan surveys conducted pursuant to s. 235.15 shall be updated to include an inventory list of such surplus lands.

Section 18. This act shall take effect July 1, 2025.

192 https://www.colliercountyfl.gov/government/growth-management/divisions/housing-policy-and-economic-development

Affordable Housing Locations:

Click Here for GIS map details



Collier County Approved Affordable Housing Commitment/Inventory List

Updated as of 02.03.2025

	NAME	STREET ADDRESS	City	Phone	TOTAL UNITS	AFFORDABLE UNITS	Unit Type	APPROVED	STATUS
1	Immokalee Apartments	601 W Delaware Ave	Immokalee	239-657-6185	100	100	Rental	1971	Open in monitoring
2	Farm Worker Village	1800 Farm Worker Way	Immokalee	239-842-0327	315	315	Rental	1972	Open in monitoring
3	Goodlette Arms	950 Goodlette-Frank RD N	Naples	239-262-3229	250	250	Rental	1975	Open in monitoring
4	George Washington Carver Apt	350 10th St N	Naples	239-261-4595	70	70	Rental	1981	Open in monitoring
5	Southern Villas of Immokalee	1225 N 18th St	Immokalee	239-657-3204	35	35	Rental	1983	Open in monitoring
6	Tollgate	3889 Tollhouse DR						1984	Expired
7	Belvedere Apartments	260 Quail Forest Blvd	Naples	239-434-0033	162	32	Rental	1985	Open in monitoring
8	Heritage Villas of Immokalee	1101 Hickock Ln	Immokalee	239-657-3204	41	41	Rental	1985	Open in monitoring
9	Willowbrook Place	1890 Ash Ln	Immokalee	239-657-3204	42	42	Rental	1988	Open in monitoring
10	Garden Lake Apartments	1022 Garden Lake Cir	Immokalee	239-657-3204	66	66	Rental	1989	Open in monitoring
11	Sanders Pines	2449 Sanders Pine Cir	Immokalee	239-657-8333	41	41	Rental	1989	Open in monitoring
12	Sommers at Palm Apts- Arbor Lake PUD	15985 Arbor View Blvd			264	101		1990	Expired
13	Oakhaven	580 Oakhaven Cir	Immokalee		160	160		1991	Expired
14	Windsong Club - April Circle PUD	11086 Windsong Cir	Naples		120	120		1991	Expired
15	Bear Creek	2367 Bear Creek Dr	Naples	239-514-0600	120	120	Rental	1992	Open in monitoring
16	Laurel Ridge	5460 Laurel Ridge Ln	Naples		78	78	Rental	1992	Expired
17	Ospreys Landing (aka Whittenberg PUD aka Victoria PUD)	100 Ospreys Lndg	Naples	239-261-5454	176	176	Rental	1992	Open in monitoring
18	Summer Glen	1012 Summer Glen Blvd	Immokalee	239-657-3204	46	45	Rental	1992	Open in monitoring
19	Jasmine Cay	100 Jasmine Circle	Naples	718-972-7878	72	72	Rental	1994	Open in monitoring
20	Saxon Manor Isles- Medow Lakes 1 & 2	105 Manor Blvd			250	124		1994	Expired
21	Timber Ridge	2726 Wilton Ct	Immokalee	239-657-8333	34	34	Rental	1994	Open in monitoring
22	Leawood Lakes	100 Leawood Cir			207	42		1995	Expired
23	College Park	6420 College Park Cir	Naples	833-219-9964	210	210	Rental	1996	Open in monitoring
24	The Point	2155 Great Blue Dr			248	248		1996	Expired
25	Villas of Capri	7725 Tara Cir	Naples	239-455-4600	235	235	Rental	1996	Open in monitoring
26	Collier Housing Alternatives	4211 Thomasson Ln	Naples	239-455-1031	10	9	Rental	1997	Open in monitoring
27	Cypress Run	550 Hope Cir	Immokalee	239-657-9032	40	39	Rental	1997	Open in monitoring
28	Whistlers Cove	11400 Whistlers Cove Blvd	Naples	239-417-3333	240	240	Rental	1997	Open in monitoring
29	Saddlebrook Village	8685 Saddlebrook Cir	Naples	239-304-3668	140	140	Rental	1998	Open in monitoring
30	Housing Alternatives of SWFL Inc.	3401 21st Ave Sw	Naples	239-793-0332	12	6	Rental	1999	Open in monitoring
31	Victoria Falls (Habitat for Humanity)	12105 Fuller LN	Naples	239-775-0036	110	110	SF-For Sale	1999	Open in monitoring
32	Whistlers Green	4700 Whistlers Green Cir	Naples	239-352-2999	168	168	Rental	1999	Open in monitoring
33	Mainstreet Village	104 Anhinga Cir	Immokalee	239-657-2009	79	79	Rental	2000	Open in monitoring
34	Brittany Bay	14815 Triangle Bay Dr	Naples	239-354-2002	184	184	Rental	2001	Open in monitoring
35	Brittany Bay II	14925 Lighthouse Rd	Naples	239-354-2002	208	208	Rental	2001	Open in monitoring
36	Brittany Bay III- Vanderbilt Place	14915 Lighthouse Rd	Naples		80	80		2001	Expired
37	Noah's Landing- Golden Gate Commerce Park PUD	10555 Noah's Cir	Naples	239-775-7115	264	264	Rental	2001	Open in monitoring
38	Wild Pines Of Naples II	2580 Wild Pines Ln	Naples	239-793-6419	104	104	Rental	2001	Open in monitoring
39	Carson Lakes (Habitat for Humanity)	3598 Carson Lakes Cir	Immokalee	239-775-0036	83	83	SF-For Sale	2002	Open in monitoring
40	Cypress Glen	3276 Tamara Dr	Naples	TBA	120	6	Rental	2002	Open in monitoring
41	Terafina	3660 Seven Seas DR						2002	Expired
42	Tuscan Isle - Saddlebrook Village	8650 Weir Dr	Naples	239-747-0332	298	298	Rental	2002	Open in monitoring
43	Botanical Place	4485 Botanical Place Cir	Naples	TBA	218	64		2003	Open in monitoring
44	Charlee Estates (Habitat for Humanity)	14621 Chickee Dr	Naples	239-775-0036	122	122	SF-For Sale	2003	Open in monitoring
45	Heritage Bay	10154 Heritage Bay Blvd			160	160		2003	Removed
46	N.N. Research and Technology Park	16150 Performance Way	Naples	TBA	16	4	Rental	2003	Open in monitoring
47	Summer Lakes I	5520 Jonquil Ln	Naples	203-869-0900	140	140	Rental	2003	Open in monitoring
48	Trail Ridge (Habitat for Humanity)	13299 Pasedo DR	Naples	239-775-0036	204	204	SF-For Sale	2003	Open in monitoring
49	Wolfe Apartments	4620 16th PL Sw	Naples	239-262-3229	46	46	Rental	2003	Open in monitoring
50	Bromelia Place / Immokalee Senior Housing	612 N 11th ST	Immokalee	239-657-3649	119	30	Rental	2004	Open in monitoring
51	Collier County Government Complex	3301 Tamiami Tr E	Naples					2004	Other
52	Eden Gardens I & II & Supportive Housing	1375 Boxwood Dr	Immokalee	239-657-7900	92	92	Rental	2004	Open in monitoring
53	Milagro Place	405 Fahrney ST	Immokalee	TBA	26	26	Rental	2004	Open in monitoring
54	Bristol Pines	7461 Bristol Cir	Naples	TBA	298	29	SF-For Sale	2005	Open in monitoring
55	Santa Barbara Landings	145 Santa Clara Dr	Naples	TBA	291	29	SF-For Sale	2005	Open in monitoring
56	Summer Lakes II	5600 Jonquil Ln	Naples	239-290-3367	276	276	Rental	2005	Open in monitoring
57	Ashley I (Crestview Park)	715 Crestview Dr	Immokalee	877-475-1665	208	208	Rental	2006	Open in monitoring
58	Liberty Landing (Habitat for Humanity)	3600 Liberty Way	Immokalee	239-775-0036	162	162	SF-For Sale	2006	Open in monitoring
59	Rockedge	250 Tamarindo LN			400	111		2006	Removed
60	Vornado	146 Cambria LN					n/a	2006	Payment In Lieu
61	Evans PUD	TBA					n/a	2007	Payment In Lieu
62	Faith Landing (Habitat for Humanity)	1874 Custer Ave	Immokalee	239-775-0036	166	166	SF-For Sale	2007	Open in monitoring
63	Independence (Habitat for Humanity)	1152 Allegiance Way	Immokalee	239-775-0036	157	157	SF-For Sale	2007	Open in monitoring
64	Legacy Lakes (Habitat for Humanity)	1891 Frey Ct	Naples	239-775-0036	66	66	SF-For Sale	2007	Open in monitoring
65	Pine Air Lakes	6275 Naples BLVD	Naples				n/a	2007	Payment In Lieu
66	Pine View	3640 Pine Ridge RD			0	0		2007	Removed
67	Arrowhead	1255 Lincoln Blvd	Immokalee	TBA	1245	186	SF-For Sale	2008	Open in monitoring
68	Ashley II (Crestview Park II)	722 Crestview Dr	Immokalee	877-475-1665	96	96	Rental	2008	Open in monitoring
69	Dockside (Habitat for Humanity)	1008 Dockside Ct	Naples	239-775-0036	44	44	SF-For Sale	2014	Open in monitoring
70	Hatchers Preserve	3180 Westclox St			18	18		2014	Expired
71	Crest Apartments - Vincentian PUD	11496 Sumter Grove Cir	Naples	239-963-1209	224	53	Rental	2015	Open in monitoring
72	Briarwood- Lago Apartments	10200 Sweetgrass CIR	Naples	239-384-6881	320	0	Rental	2017	Open in monitoring
73	Esperanza Place (Rural Neighborhoods)	2693 Marianna Way	Immokalee	239-657-2009	48	48	Rental	2018	Open in monitoring
74	Esperanza Place (Habitat for Humanity)	2248 Esperanza Way	Immokalee	239-775-0036	62	62	SF-For Sale	2018	Open in monitoring
75	I-75/Alligator Alley (Edge 75)	120 Bedzel Cir	Naples		0			2018	Removed
76	Regal Acres (Habitat for Humanity)	10325 Majestic Cir	Naples	239-775-0036	295	300	SF-For Sale	2018	Open in monitoring
77	Allura	16210 Allura Cir	Naples	239-788-2641	304	31	Rental	2019	Open in monitoring
78	Casa Amigos	2687 Amigo Way	Immokalee	239-657-2009	24	24	Rental	2019	Open in monitoring
79	Courthouse Shadows	3368 Torrente Ave	Naples	TBA	300	0	Rental	2019	Open in monitoring
80	Ekos Allegro (fka Allegro at Hacienda Lakes)	8455 Rattlesnake Hammock Rd	Naples	239-686-0050	160	160	Rental	2020	Open in monitoring
81	Hammock Park Apartments	8260 Rattlesnake Hammock Rd	Naples	TBA	265	27	Rental	2020	Approved-Under Construction
82	Immokalee Fair Housing Alliance, Inc.	2032 Corazon De La Comunidad CIR	Immokalee	TBA	128	128	Rental	2020	Approved-Under Construction
83	Meridian Village	1000 Airport RD S	Naples	TBA	120	24	Rental	2020	Open in monitoring
84	Rivergrass Village SRA	TBA			2500		n/a	2020	Payment In Lieu
85	Aspire Naples (fka Blue Coral Apartments)	5050 Aspire Way	Naples	239-376-0806	234	70	Rental	2021	Approved- Under Construction
86	Bellmar Village SRA	TBA	Naples	239-261-4455	2750	413	SF-For Sale	2021	Approved
87	Cirrus Pointe (Camden Landing RPUD)	TBA			108	44		2021	Removed
88	Ekos Cadenza (fka Cadenza at Hacienda Lakes) SDPI	8369 Rattlesnake Hammock Rd	Naples	239-686-0050	160	160	Rental	2021	Approved- Under Construction
89	Ekos on Santa Barbara (fka Bembridge)	4640 Santa Barbara Blvd	Naples	239-686-0500	82	82	Rental	2021	Open in monitoring
90	NC Square	TBA	Naples	TBA	129	129	SF-For Sale	2021	Approved
91	Randall Curve Apartments	13669 Immokalee RD	Naples	TBA	400	40	Rental	2021	Approved-Under Construction
92	Brightshore Village SRA	21005 Immokalee Rd	Naples	TBA	2000	170	Rental	2022	Approved
93	Carman Dr. 15	TBA	Naples	TBA	212	48	Rental	2022	Approved
94	Collier Blvd Lord's Way- Milano Lakes Apartments (Phase 1)	3713 Milano Lakes Circle	Naples	239-558-1534	296	147	Rental	2022	Open in monitoring
95	Collier Blvd Lord's Way- Milano Lakes Apartments (Phase 2)	TBA	Naples	TBA	76	76	Rental	2022	Approved-Under Construction
96	Fiori (fka Amerisite)- Latigo Apartments	8710 Fiori Dr	Naples	310-504-2902	303	68	Rental	2022	Approved- Under Construction
97	Golden Gate Golf Course - Renaissance Hall Old Course (Phase I)	4150 Golden Gate Pkwy	Naples	TBA	252	252	Rental	2022	Approved
98	Golden Gate Golf Course - Renaissance Hall Senior Living (Phase II)	4150 Golden Gate Pkwy	Naples	TBA	120	120	Rental	2022	Approved
99	Marlowe Naples Apartments (Santa Barbara - Whitaker)	6020 Whitaker Rd	Naples	239-999-8410	216	43	Rental	2022	Approved-Under Construction
100	Ascend Naples	5091 Cherrywood Drive	Naples	TBA	208	71	Rental	2023	Approved
101	Haven Naples Apartments	TBA	Naples	TBA	336	76	Rental	2023	Approved
102	Isles of Capri	TBA	Naples				n/a	2023	Payment In Lieu
103	Kaicasa (Habitat for Humanity)	2362 Kaicasa Ln	Immokalee	239-775-0036	400	400	SF-For Sale	2023	Approved-Under Construction
104	Long Water Village SRA- Town of Big Cypress	TBA	Naples	TBA	2427	497	Rental	2023	Approved
105	Orange Blossom Ranch	1938 Hawthorn Rd	Naples	TBA	400	40	Rental	2023	Approved
106	PFCF/NSV Immokalee	2135 Westclox St	Immokalee	TBA	250	170	Rental	2023	Approved
107	The Teale-Golden Gate Inn	4100 Golden Gate Pkwy	Naples	TBA	215	49	Rental	2023	Approved
108	Tree Farm (Habitat for Humanity)	8677 Addison Place CIR	Naples	239-775-0036	580	58	SF-For Sale	2023	Approved
109	Casa San Juan Diego	133 Hancock St	Immokalee	TBA	80	80	Rental	2024	Approved
110	Ekos Creekside (fka Ekos on Collier)	894 Henderson Creek Dr	Naples	TBA	160	160	Rental	2024	Approved
111	Elanto at Naples	15255 Tamiami Trail East	Naples	TBA	309	31	Rental	2024	Approved
112	JLM Living East	2655 Sundance St	Naples	TBA	305	92	Rental	2024	Approved
113	Mattson at Vanderbilt	333 Vanderbilt Beach Rd	Naples	TBA	150	72	Rental	2024	Approved
114	Tollgate Commercial Center (Super 8 Motel)	3880 Tollgate Blvd	Naples	TBA	110	33	Rental	2024	Approved
115	Fiddler's Creek	1150 Auto Ranch Rd	Naples	TBA	750	225	Rental	2024	Approved
116	Tamiami Trail Greenway Road MPUD	11001 Greenway Rd	Naples	TBA	300	90	Rental	2025	Approved
					29,120	**12,074**			

Government in the Sunshine



Office of the County Attorney
Jeffrey A. Klatzkow, County Attorney

Sunshine Law

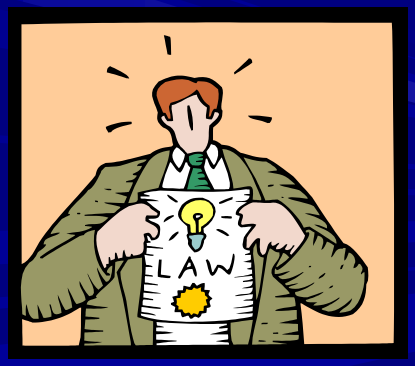
- Protects the public from “closed door” decision making and provides a right of access to governmental meetings.

(F.S. § 286.011 (“Sunshine Law”) and Fl. Constitution Art. I, Sec. 24)


ARE YOU SURE WE DON'T NEED GOVERNMENT IN THE SUNSHINE?
TRUST ME
HOW WILL WE KNOW IF YOU'RE DOING ANYTHING WRONG?
TRUST ME
WHAT IF WE DON'T TRUST YOU?
WITHOUT GOVERNMENT IN THE SUNSHINE YOU'LL JUST HAVE TO...

What is Florida's Government-in-the-Sunshine Law?

- Enacted in 1967
- Found in Chapter 286, Florida Statutes
- Establishes a basic right of access to most meetings of boards, commissions and other governing bodies of state and local governmental agencies or authorities



The Sunshine Law gives the public access to meetings of "any board or commission of any state agency or authority or of any agency or authority of any county, municipal corporation, or political subdivision" *AND*

- Allows the public to observe each preliminary step leading to the final decision.
- Prevents the Board from creating closed committees that narrow the Board's decisions.
- Applies to Board appointed committees.

The Three Basic Requirements of the Sunshine Law, § 286.011, Florida Statutes







Meetings of public boards, commissions or committees ("boards") must be open to the public.

Reasonable notice of such meetings must be given.

Minutes of the meeting must be taken.

I

Meetings of public boards, commissions or committees ("boards") must be open to the public.

Committee type determines the applicability of these laws

There are two types of committees:

1. Decision Making Committees
2. Fact finding/Focus Group Committees



Decision Making Committees become part of the Board's decision making process *AND*

- Choose alternatives and direction; narrow or eliminate options for the Board's consideration.
- Make decisions by voting.
- Make recommendation to the Board directly or through staff.
- Create bylaws.

Fact Finding Groups provide a source of community input and factual resources *AND*

- Have no characteristics of a Decision making committee.
- Do not need bylaws.
- Provide individual input, data and factual findings to staff, as part of staff's development in its advisement to the Board.
- Do not take votes.
- Maintain a brainstorming focus.

The Sunshine Law applies when --

- Two or more members of a governing board (such as the BCC) discuss a matter that may foreseeably come before the governing board.

E-Mails

E-mails of factual background information from one board member to other board members are permitted if there is no exchange of board members' comments or responses on subjects requiring board action. The e-mails become a public record.



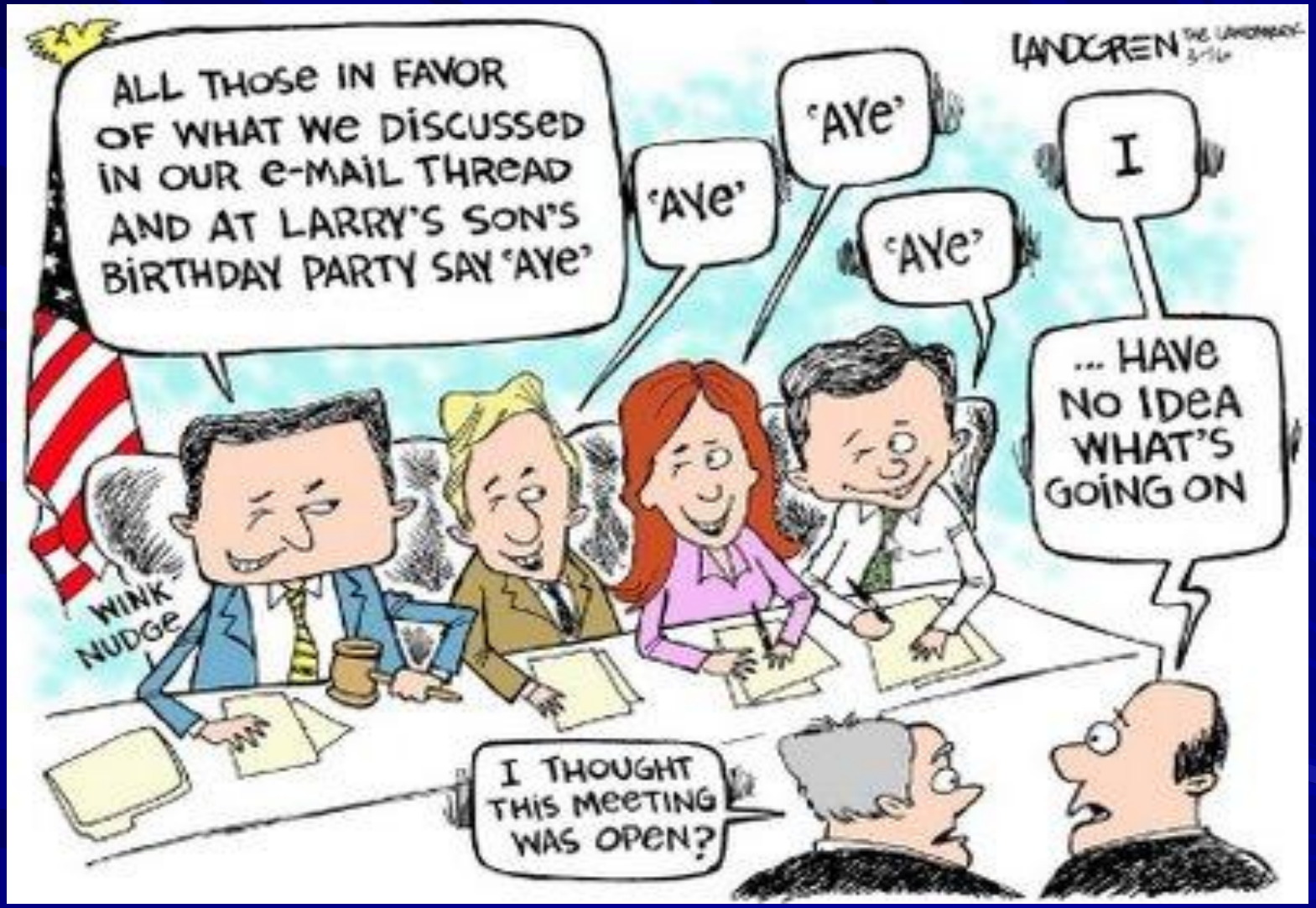
ADVISORY BOARD GUIDELINES FOR PUBLIC RECORDS AND EMAILS

- While you are serving on an advisory board, correspondence and emails to or from anyone, on any computer (private or government owned), relating to County business is a public record.

- Public records must be maintained pursuant to State guidelines. You may save them on the computer, a disk, or as a hard copy. If leaving your position on an advisory board, please provide a copy of all public records in your possession to the County Staff Liaison.

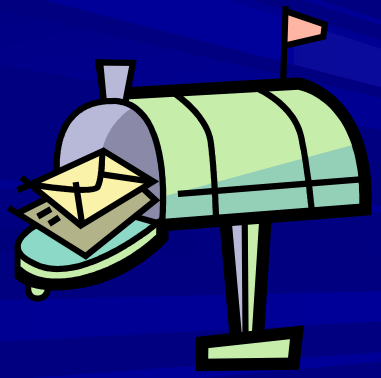
- One-way communications by email should be directed to the County Staff Liaison. Pursuant to the Sunshine Law, no two-way communications between members (except during publicly noticed meetings) is permitted.

- If you choose to communicate with members of the public concerning County business via email, please be aware that your name and email address, as well as the name and email address of the public person, becomes a public record.


LANDGREN
ALL THOSE IN FAVOR OF WHAT WE DISCUSSED IN OUR E-MAIL THREAD AND AT LARRY'S SON'S BIRTHDAY PARTY SAY 'AYE'
'AYE'
'AYE'
'AYE'
I
... HAVE NO IDEA WHAT'S GOING ON
WINK
NUDGE
I THOUGHT THIS MEETING WAS OPEN?

Written Correspondence

A board member may send documents on matters coming before the board for official action to other board members, PROVIDED there are no responses from, or interaction related to documents among, the board members prior to the public meeting. The written correspondence becomes a public record.



The Sunshine Law does not apply when --

- Committees or groups appointed to engage only in fact-finding activities.
- Board created focus groups or other such committees that:

  Only provide individual input, data and facts as part of staff's development in its advisement to the Board.

  Do not narrow options.

The Sunshine Law is broadly construed
Exemptions are narrowly construed

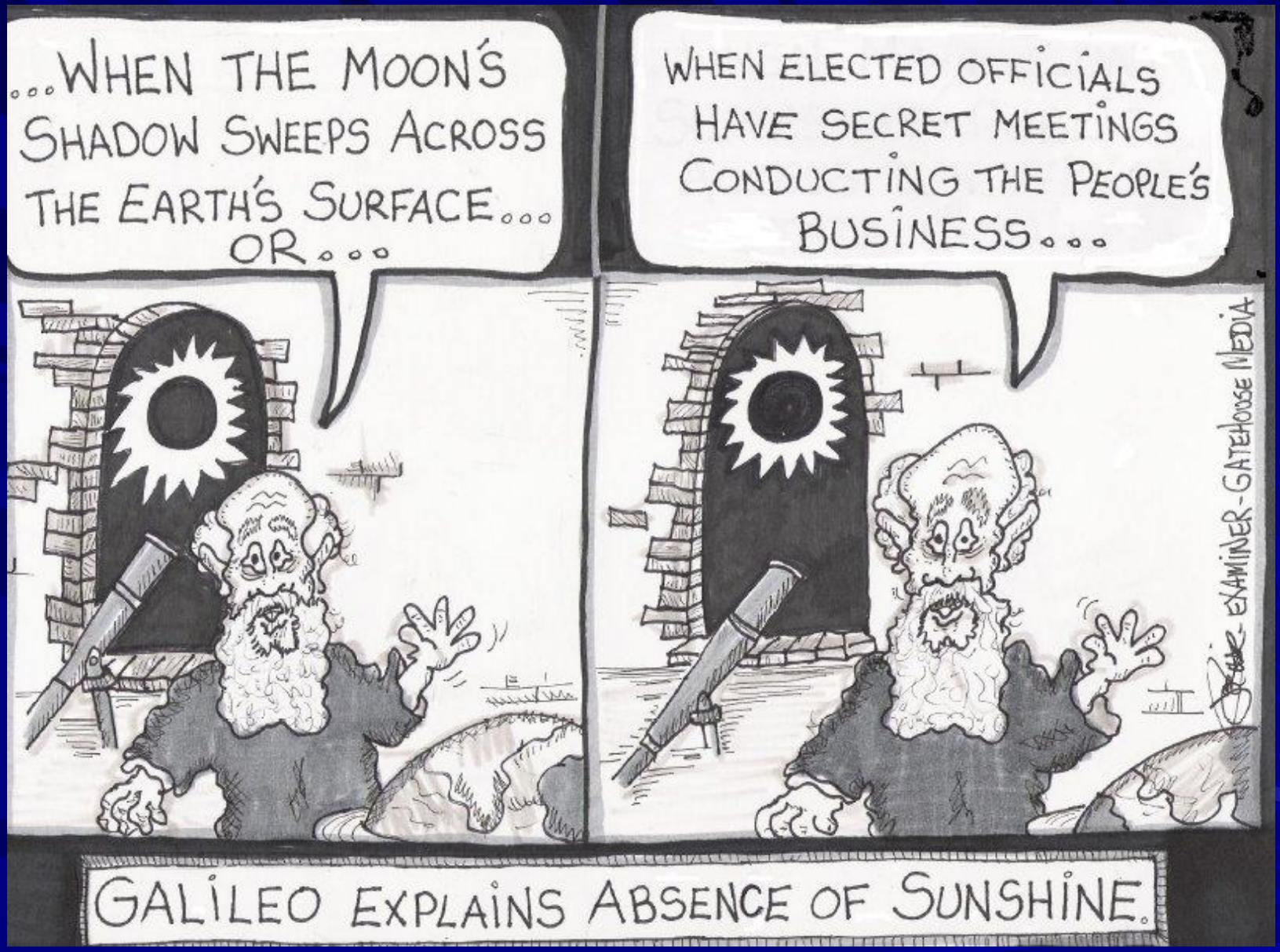
Meetings Must be Open to the Public

The public must be allowed to attend meetings; however, there is no obligation to allow the public to participate. The location:

- Must be accessible
- Sufficient size for turnout
- Facility cannot discriminate based on age, race, etc.
- Public access not unreasonably restricted
- Be within Collier County with few exceptions

II
Reasonable notice of such meetings must be given.

- The public must be given reasonable and timely notice so they can decide whether to attend. What is “reasonable” or “timely” depends on the circumstance. It does not necessarily require a newspaper advertisement; contact the County Attorney Office for guidance.


...WHEN THE MOON'S SHADOW SWEEPS ACROSS THE EARTH'S SURFACE... OR...
WHEN ELECTED OFFICIALS HAVE SECRET MEETINGS CONDUCTING THE PEOPLE'S BUSINESS...
EXAMINER-GATEHOUSE MEDIA
GALILEO EXPLAINS ABSENCE OF SUNSHINE.

III

Minutes of the meeting are required. Written minutes must be taken and made available promptly.

- Sound recordings may also be used, but only in addition to written minutes.
- Minutes may be a brief summary of meeting's events.
- Minutes are public records.
- Minutes must record the votes.



Inspection Trips

Members of a public board or commission may conduct inspection trips.

- If discussion relating to the business of the board will occur between board members during an inspection trip,

SUNSHINE LAW APPLIES

- All requirements of § 286.011, F.S. must be met.

Electronic Meetings Local Governments

Absent member may participate by telephone conference if:

- Absence is due to extraordinary circumstances
- A quorum of local board must be physically present



The Sunshine Law and Staff

- When a staff member is appointed to a board, the staff member loses his or her identity as staff while working on the board and the Sunshine law applies to the board.
- It is the nature of the act performed, not the makeup of the board or the proximity of the act to the final decision, which determines whether a board composed of staff is subject to the Sunshine Law.

Sunshine Law Applications

- Does not apply to members of different boards
- Applies to non-voting members as well as voting members
- Social events are fine – but do not discuss County business
- Does not apply to private organizations, such as homeowners' associations
- Does not apply to a meeting between a Commissioner and a private citizen
- Does not apply to staff so long as staff is in a fact-finding mode
- Applies to staff once staff become part of the decision-making process

Validity of Action Taken in Violation of The Sunshine Law/Subsequent Corrective Action

- Section 286.011, F.S., provides that no resolution, rule, regulation or formal action shall be considered binding except as taken or made at an open meeting.
- Recognizing that the Sunshine Law should be construed so as to frustrate all evasive devices, the courts have held that action taken in violation of the law is void *ab initio*.
- *Within limitations*, some case law exists holding that Sunshine Law violations can be cured by independent, final action taken completely in the Sunshine.

What are the Consequences if a Public Board or Commission Fails to Comply with the Sunshine Law?

Criminal Penalties:

- It is a second degree misdemeanor to knowingly violate the Sunshine law.
- Punishable with a fine of up to $500 and/or up to 60 days imprisonment.

Other Penalties Include:

- Removal from position.
- Payment of attorney's fees incurred by the challenging party, as well as declaratory and injunctive relief.

A Penalty Example

BASED ON LOCAL NEWS REPORTS

Childers To Prison

No restitution ordered



Former Florida Senate President W.D. Childers, 69, was sentenced in Crestview today to 3 1/2 years in state prison after last month's jury verdict on charges of bribing former Escambia County commissioner Willie Junior. Childers allegedly bribed Junior to vote for purchasing the former soccer complex in Pensacola at a price of $3.9 million.

After he completes his sentence, Childers also will have to perform 250 hours of community service and serve 1 1/2 years on probation.

Prosecutors sought the maximum penalty of 10 years, five years on each count and more than $1 million in restitution. Prosecutors also asked the judge to order restitution of more than a million dollars to cover alleged county losses on the real estate deal. However, the judge declined to order restitution. Childers maintained he has a negative net worth.

Childers, 69, also has been serving a 60-day county jail sentence for violations of Florida's open-government "sunshine" law. He will begin serving the 3 1/2 year prison sentence once he completes the jail term.

The "Banty Rooster," as he was known over a 30-year career as a state legislator in Tallahassee, decided to run for county office as a Republican in 2000 because he was term-limited under a new Florida law. Childers' challenge to the term limits law also was turned away by the courts.

Childers was accused of bribing Junior, a Pensacola Democrat, with at least $90,000 in checks. Junior testified Childers handed him the money pot following the vote but that he returned $40,000 in exchange for a cashier's check.

Childers denied giving Junior any cash and testified the checks were loans secured by Junior's equity in a funeral home. He produced two handwritten promissory notes they had signed. Assistant State Attorney John Simon argued that Childers never filed the notes with the court clerk in order to enforce them, which he had often done with other loans, including those to family members.

...in exchange promised a

...s. Georgann Elliott also

...e violations and

Sentenced to Jail for Sunshine Law Violations: **Suspended Escambia County Commissioner W.D. Childers was sentenced to 60 days in jail for discussing redistricting in a telephone conversation while fellow commissioner listened on a speaker phone, and pleaded no contest for talking with two fellow commissioners about county building projects in front of a staffer.**



The Headlines We Don't Want!

"Judge Finds Marco Councilor Guilty of Sunshine Law Violation!!" Naples Daily News 2/7/08

"Planning Member's Lunch Clouds Florida in Sunshine Law" Naples Daily News 2/7/07

Grand Jury OKs City Sunshine Law Investigation 7/12/07 Jacksonville News

"A Times-Union Investigation Finds Evidence of Florida Sunshine Law Violations" Florida Times-Union 6/14/07

Questions??



Resources/Contacts

OFFICE OF THE COUNTY ATTORNEY

Jeffrey A. Klatzkow, County Attorney

Scott R. Teach, Deputy County Attorney

Colleen M. Greene, Assistant County Attorney

3301 East Tamiami Trail, 8th Floor
Naples, FL 34112
Phone: (239) 252-8400
Fax: (239) 252-6300



Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

March 11, 2025

FOR IMMEDIATE RELEASE

Notice of Public Meeting
Affordable Housing Advisory Committee
Collier County, Florida

March 18, 2025
9:00 A.M.

Notice is hereby given that the **Affordable Housing Advisory Committee** will meet on **Tuesday, March 18th at 9:00 a.m.** in the Collier County Museum Lecture Hall located at 3331 Tamiami Trail East, Naples, Florida 34112.

About the public meeting:

Two or more members of the Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future Board of County Commissioners meeting.

Two or more members of the Collier County Planning Commission (CCPC) may be present and may participate at the meeting. The subject matter of this meeting may be a future item for discussion and action at a future CCPC meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations in order to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Cormac Giblin at (239) 252-2460 or Sarah Harrington at (239) 252-4211.

###

Collier County
Growth Management Community Development

Affordable Housing Advisory Committee
Attendance Roster – Date: March 18, 2025

AHAC Members

Must have (6) members for a quorum

Commissioner Dan Kowal:	Present	**Gary Hains:**	Present
Stephen Hruby:	Present	**Catherine Myers:**	Present
Jennifer Faron:	Present	**Andrew Terhune:**	Present
Mary Waller:	Present	**Hannah Roberts:**	Present
Todd Lyon:	Present	**Paul Shea:**	Present
Arol Buntzman:	Present	**Robert Mulhere:**	Present

County Staff Members

Name	Title	
Cormac Giblin	Director, Housing Policy & Economic Development, GMCD	Present
Kristi Sonntag	Director, Community & Human Services, PSD	Present
Donald Luciano	Assistant Director, Community & Human Services, PSD	Absent
Derek Perry	Assistant County Attorney, County Attorney's Office	Present
Sarah Harrington	Manager, Planning, Housing Policy & Economic Development, GMCD	Present
Priscilla Doria	Ops Support Specialist II, Housing Policy & Economic Development, GMCD	Present
Lisa Carr	Supervisor – Grants, Community & Human Services Divison, PSD	Present
Anne McLaughlin	Executive Director, MPO ITS	Present
Mike Bosi	Director, Planning & Zoning, GMCD	Present

Collier County

GROWTH MANAGEMENT
COMMUNITY DEVELOPMENT

Affordable Housing Advisory Committee

Sign-in Sheet (Public)

March 18, 2025

Please Print

NAME	REPRESENTING	PHONE No. or email
Anne McLaughlin	Collier MPO	x 5884
Michael Pucher	Housing Alliance, CCCLT, HELP	434-2397
Megan Phillips	Collier County Clerk	
Maria Gutierrez	Collier County Clerk of Courts	
Susan Golden		239.404.9904
Jessica Turner	Collaboratory	239-707-7408
Carley Dykeman	Moonlight Park	239-571-6968

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

March 4, 2025

FOR IMMEDIATE RELEASE

Notice of Public Meeting
Collier County Coastal Advisory Committee
Collier County, Florida

March 13, 2025
1:00 p.m.

Notice is hereby given that the **Collier County Coastal Advisory Committee** will meet **Thursday, March 13th ,** at **1:00 p.m.** in the Board of County Commissioners Chambers, Collier County Government Center, 3299 Tamiami Trail E., Naples, Florida.

The following website provides information on this committee
https://www.colliercountyfl.gov/government/advisory-boards-and-authorities/coastal-advisory-committee

About the public meeting:

Two or more members of the Board of County Commissioners, City of Naples City Council, City of Marco Island City Council, Tourist Development Council, and the Pelican Bay Services Division may be present and participate at the meeting. The subject matter of this meeting may be an item for discussion and action at future meetings of these boards, councils, or agencies.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division located at 3335 Tamiami Trail E., Naples, Florida 34112 or 239-252-8380 as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Maria Becerra at (239) 252-2966.

###

March 13, 2025

Meeting Agenda and Notice

Coastal Advisory Committee (CAC)
Thursday, March 13, 2025– 1:00 p.m.
Collier County Board Chambers
Collier County Government Center
3299 Tamiami Trail East, Third Floor, Naples, FL

Sunshine Law on Agenda Questions
2025 CAC MEETING DATES

I. Call to Order

II. Pledge of Allegiance

III. Roll Call

IV. Changes and Approval of Agenda

V. Public Comments

VI. Approval of CAC Minutes

February 13, 2025

VII. Staff Reports

Extended Revenue Report

VIII. New Business

1. ES - Vanderbilt & Pelican Bay Beach Renourishment

- Work Order - Vanderbilt & Pelican Bay

2. ES - Naples Beach Renourishment

- Work Order - Naples Beach

3. ES - Aptim LGFR

- Work Order - Aptim LGFR

4. ES - Change Order #3 - Park Shore

- Change Order #3 - Earth Tech_ Park Shore

IX. Old Business

ASCE Article on Beach Renourishment

X. Announcements

XI. Committee Member Discussion

XII. Next Meeting Date/Location

April 10, 2025 at 1:00 p.m.

XIII. Adjournment

All interested parties are invited to attend, and to register to speak and to submit their objections, if any, in writing, to the board prior to the meeting if applicable.
For more information, please contact Andrew Miller at (239) 252-2922.

If you are a person with a disability who needs any accommodation in order to participate in this proceeding, you are entitled, at no cost to you, to the provision of certain assistance. Please contact the Collier County Facilities Management Department located at 3301 East Tamiami Trail, Naples, FL 34112, (239) 252-8380.

Public comments will be limited to 3 minutes unless the Chairman grants permission for additional time.

Collier County Ordinance No. 99-22 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners) before the Board of County Commissioners and its advisory boards, register with the Clerk to the Board at the Board Minutes and Records Department.

COLLIER COUNTY

COASTAL ADVISORY COMMITTEE (CAC)

Thursday, February 13th – 1:00 p.m.

Collier County Board Chambers
Collier County Government Center
3299 Tamiami Trail East, 3rd Floor, Naples, FL

Chairman Joe Burke, City of Naples
Linda Penniman, City of Naples
Erik Brecknitz, City of Marco Island
Joe Burke, Chairman
Jim Burke, Unincorporated Collier County
Bob Raymond, Unincorporated Collier County
Robert Roth
Dr. Judith Hushon
Steve Koziar
Bob Raymond
Dave Trecker

ALSO, PRESENT
Andy Miller, Coastal Zone Management
Colleen Greene, Managing Assistant County Attorney
Bob Middleton, City of Naples

Any person who decides to appeal a decision of This Board you will need a record of the proceedings pertaining thereto and therefore may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based, Neither Collier County nor This Board shall be responsible for providing this record.

1. **CALL TO ORDER**

2. **PLEDGE OF ALLEGIANCE**

3. **ROLL CALL (Skipped)**

4. **CHANGES AND APPROVAL OF AGENDA (with Changes)**
   Motion passed 8-0

5. **PUBLIC COMMENTS**

Patrick Wack, Seagate POA and Joanne Janney, Naples Gate
Restoration of Dunes & Vegetation at Clam Pass Park.

This Board cannot act on Public Comment. It must be a regular agenda item for that
Bob Roth, Linda Penniman, Joe Burke
Board questions specifics of the area in Question-*Clam Pass Park*. *High Tides might be an issue*.

Three points were mentioned:

- *Will this be a viable Solution to the issue?*
- *The Solution must meet with Environmental guidelines*
- *Regulation*

Andy Miller
Will look into it.

Public Speaker Patrick delivers comments
Board
Answers will be delivered at the next meeting.
Solution to the issue will likely be inexpensive.

6. APPROVAL OF CAC MINUTES December 12th, 2024
A few errors were found and need to be fixed.
Dr. Judith Hushon moved to approve the minutes with amendments
Joe Burke seconded
Motion passed 8-0

7. STAFF REPORTS
Extended Revenue Report
Andy Miller reported good revenue collection so far, above budget estimations. No further staff reports presented.

8. NEW BUSINESS
1. ES – City of Naples Outfall Project
Recommendation to accept the report from the City of Naples Tourism Impact Study for the Stormwater Outfall Pipe Removal and make a finding that this action promotes tourism.

Andy Miller
Stormwater Outfall Cleanup.
Bob Middleton presented an overview for the stormwater project aiming to improve water quality and flood protection.
Funding for this project needed from the TDC ($10M)
This project will allow for improving the overall water quality, offer protection from flooding, & have a positive impact on Tourist Activities.

Dave Trecker & Judith Hushon
Pipe Construction to begin at the end of February, 2025 & will proceed for two years.

Bob Roth
Concerns about water contamination regarding Alligator Lake.
Joe Burke, D. Trecker
Generators, Pumps, etc.
The result of the project would be a 95% improvement in water purity.

Dave Trecker motioned to approve the budget amendment
Linda Penniman seconded
Motion passed 8-0

2. ES-2024 South Naples Emergency Berm
Recommendation to award Invitation to Bid ("ITB") No. 24-8323 in the amount of $1,178,500.00 to Earth Tech Enterprises, Inc. for the Collier County South Naples Emergency Berm truck haul & construction project, authorize the Chairman to sign the attached Agreement, and make a finding that this item promotes tourism. (Project 50280)

Joe Burke (?) motioned to approve
Linda Penniman seconded
Motion passed 8-0

3. ES-APTIM CO#1 – Park Shore

Recommendation to approve Change Order No. 1, adding $33,702.40 and 137 days to the Work Order under library contract 18-7432-CZ with APTIM Environmental & Infrastructure, LLC for the Park Shore Beach Renourishment; and make a finding that this item promotes tourism (Project 90067).

Dave Trecker (?) motioned to approve the budget amendment
Linda Penniman seconded
Motion passed 8-0

4. ES-APTIM CO#2 – Park Shore

Recommendation to approve Change Order No. 2 for contract No. 24-8292 with Earth Tech Enterprises, Inc. for the Park Shore Beach Renourishment, increasing the contract amount by $2,739,153, applying the Allowance of $254,000.00 and adding 30 days to the contract time; approve Necessary budget amendment; and make a finding that this item promotes tourism (Project 90067).

Dr. Judith Hushon motioned to approve the budget amendment
Linda Penniman seconded
Motion passed 8-0

9. OLD BUSINESS
Protecting Beach Dunes-Dune Fencing
White paper was prepared by Joseph Burke as a high level evaluation of potential use of sand fencing for dune sand accretion and protection from pedestrian traffic. Dune barriers are also reviewed.

Joe Burke
Sand fencing may not be necessary.

Funding for Tigertail lagoon 'Ecological restoration' on Marco Island

- Letter from Andrew Tyler opposing continued restoration efforts discussed.

- Concerns about environmental impacts vs. protection of property. Suggestion to have project engineer present at next meeting.

Linda Penniman exits meeting (2:24)

Sunshine State Law - Colleen Greene

- All Board members must follow Sunshine Law (Official business must not be discussed privately)
- Applies to written correspondence as well as Social Media.

10. ANNOUNCEMENTS

None

11. COMMITTEE MEMBER DISCUSSION

None

12. NEXT MEETING DATE/LOCATION

March 13, 2025 at 1:00 p.m.

13. ADJOURNMENT

There being no further business for the good of The County, the Coastal Advisory Committee Hearing was adjourned at 2:41 p.m.

Collier County Coastal Advisory Committee

_____

Chairman Joe Burke

The Minutes were approved by

_____ _____

Name ***Signature***

as presented on_____

or amended on_____

FY 25 TDT Collections Report

28-Feb-2025

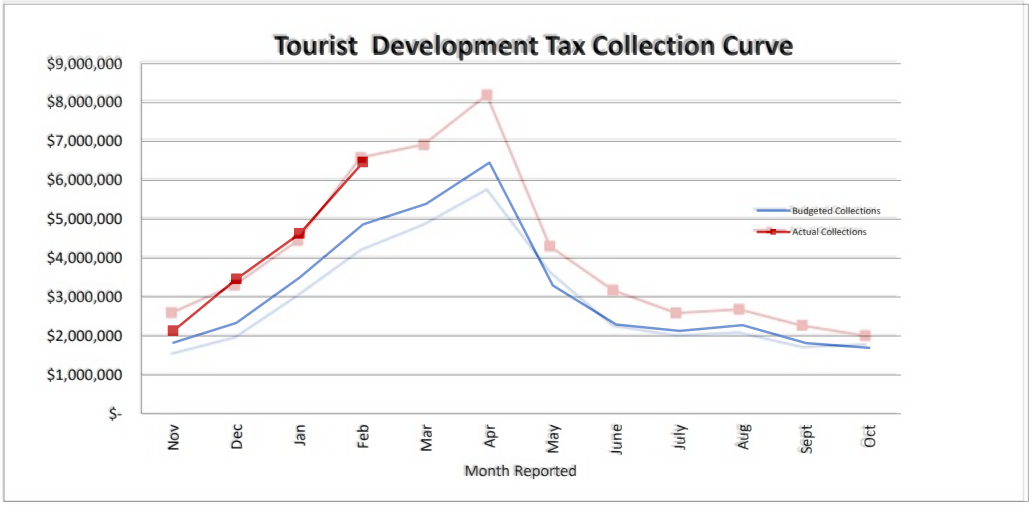
Fund Reporting	Fund	Adopted Budget	Updated Annual Forecast	Budgeted YTD	YTD Actual	Variance to Budgeted YTD
Beach Park Facilities	1100	1,357,700	1,506,773	448,858	598,004	149,146
TDC Promotion	1101	13,643,700	15,361,353	4,510,634	5,606,346	1,095,711
Non-County Museums	1103	724,300	803,827	239,455	318,553	79,098
TDC Admin	1104	-	-	0	-	-
Beach Renourishment	1105	14,782,800	16,405,928	4,887,223	6,509,992	1,622,769
Disaster Recovery	1106	-	-	0	-	-
County Museums	1107	2,000,000	2,000,000	661,204	1,283,247	622,043
TDC Capital	1108	5,415,500	6,010,113	1,790,375	2,385,603	595,228
	Gross Budget	**37,924,000**	**42,087,994**	**12,537,749**	**16,701,744**	**4,163,995**
	Less 5% Rev Res	(1,896,200)	10.98%		% Over/(Under) Bud	33.2%
	Net Budget	36,027,800				

Collections

Month Reported	Actual	Cum YTD	% Budget Collected to Date	% Variance FY24 Collections	% Variance FY23 Collections	% Variance FY22 Collections
Nov	2,137,562	2,137,562	5.64%	-16.72%	-9.20%	-5.03%
Dec	3,465,253	5,602,815	14.77%	5.83%	30.93%	19.12%
Jan	4,632,754	10,235,570	26.99%	5.02%	24.82%	3.04%
Feb	6,466,174	16,701,744	44.04%	-1.10%	19.50%	8.28%
Mar	-	16,701,744	44.04%	n/a	n/a	n/a
Apr	-	16,701,744	44.04%	n/a	n/a	n/a
May	-	16,701,744	44.04%	n/a	n/a	n/a
June	-	16,701,744	44.04%	n/a	n/a	n/a
July	-	16,701,744	44.04%	n/a	n/a	n/a
Aug	-	16,701,744	44.04%	n/a	n/a	n/a
Sept	-	16,701,744	44.04%	n/a	n/a	n/a
Oct	-	16,701,744	44.04%	n/a	n/a	n/a
Total	**16,701,744**	**16,701,744**	**YTD**	**-0.53%**	**18.26%**	**6.87%**
			42,087,994			

Budget Comparison

	5 Yr History-Cum	5 Yr History-Monthly	Budgeted Collections	Actual Collections	Budget to Actual Variance	Updated Forecast
Nov	4.8%	4.8%	1,827,211	2,137,562	310,352	2,137,562
Dec	11.0%	6.2%	2,338,559	3,465,253	1,126,694	3,465,253
Jan	20.2%	9.2%	3,502,227	4,632,754	1,130,527	4,632,754
Feb	33.1%	12.8%	4,869,752	6,466,174	1,596,422	6,466,174
Mar	47.3%	14.2%	5,397,019	-	-	5,397,019
Apr	64.3%	17.0%	6,460,316	-	-	6,460,316
May	73.0%	8.7%	3,303,306	-	-	3,303,306
June	79.1%	6.1%	2,299,023	-	-	2,299,023
July	84.7%	5.6%	2,134,934	-	-	2,134,934
Aug	90.7%	6.0%	2,277,930	-	-	2,277,930
Sept	95.5%	4.8%	1,816,973	-	-	1,816,973
Oct	100.0%	4.5%	1,696,749	-	-	1,696,749
Total	100.0%	100.0%	**37,924,000**	**16,701,744**	**4,163,995**	**42,087,994**
			% over/(under) budget		33.2%	10.98%



EXECUTIVE SUMMARY

Recommendation to approve a work order with Humiston & Moore Engineers to provide professional engineering services for the 2025 Vanderbilt Beach Renourishment Project and 2025 Pelican Bay Beach Renourishment under Contract No. 18-7432-CZ for time and material not to exceed $143,811 and make a finding that this item promotes tourism (Fund 1105, Project No. 90066 and 50126).

OBJECTIVE: To move forward with professional engineering services for the 2025 Vanderbilt Beach and Pelican Bay Beach Renourishment Projects.

CONSIDERATIONS: Humiston & Moore Engineers will assist the County in conducting beach renourishment activities on Vanderbilt Beach from FDEP reference monuments R-22 to R-31.5 and in Pelican Bay Beach from R-31.5 to R-37. This work order will provide professional services including engineering design, preparation of construction plans and technical specifications, bidding services, coordination with permitting agencies for Notice to Proceed, and serving as the Engineer of Record for the construction events. As with past renourishments, Pelican Bay Services Division will pay for its share of the engineering services. The location of the project is not eligible for tourist development taxes.

The engineering costs for Vanderbilt Beach and Pelican Bay Beach are listed below according to the tasks "a" and "b" respectively, as outlined in H&M's proposal:

Vanderbilt Beach Project 90066: $95,121
Pelican Bay Beach Project 50126: $48,690

Pelican Bay Services Division will contribute funding based on the ratio / quantity of sand placed at their beach versus the overall project quantity.

This item is consistent with the Quality of Place Objectives of the County's Strategic Plan.

FISCAL IMPACT: Funding in the amount of $95,121.00 is available within Tourist Development Tax Beach Renourishment Fund (1105), Projects 90066. The source of funding is Tourist Development Tax.

Funding in the amount of $48,690.00 is available within Pelican Bay Irrigation and Landscape (3041) Project 50126. Source of funding is Unincorporated General Fund. Pelican Bay Services Division will contribute funding based on the ratio / quantity of sand placed at their beach versus the overall project quantity.

FDEP cost-share funding will be requested if eligible at a future date to reimburse Collier County for a portion of the completed work.

GROWTH MANAGEMENT IMPACT: This item is consistent with the Conservation and Coastal Management Element of the Growth Management Plan.

ADVISORY COMMITTEE RECOMMENDATIONS: This item will be presented to the Coastal Advisory Committee (CAC) on March 13, 2025, and the Tourist Development Council (TDC) on March 18, 2025.

LEGAL CONSIDERATIONS: This item is approved as to form and legality and requires majority vote for approval. – CMG

RECOMMENDATION: To approve a work order with Humiston & Moore Engineers to provide professional engineering services for the 2025 Vanderbilt Beach Renourishment Project and 2025 Pelican Bay Beach Renourishment under Contract No. 18-7432-CZ for time and material not to exceed $143,811.00, and make a finding that this item promotes tourism (Fund 1105, Project No. 90066 and 50126).

Prepared By: Andrew Miller, P.E., Coastal Zone Management, Capital Project Planning, Impact Fees, and Program Management Division

WORK ORDER/PURCHASE ORDER

Contract 18-7432-CZ "Professional Services Library- Coastal Engineering Category"
Contract Expiration Date: March 9, 2026

This Work Order is for professional Engineering services for work known as:

Project Name: 2025 Vanderbilt & Pelican Bay Beach Renourishment
Project No: 90066.1 & 50126.2

The work is specified in the proposal dated February 4, 2025 which is attached hereto and made a part of this Work Order. In accordance with Terms and Conditions of the Agreement referenced above, this Work Order/Purchase Order is assigned to: Humiston & Moore Engineers, P.A.

Scope of Work: As detailed in the attached proposal and the following:

* Task 1a Design, Construction Plans and Specifications – Vanderbilt Beach
* Task 1b Design, Construction Plans and Specifications – Pelican Bay

* Task 2a Bidding Assistance & Notice to Proceed – Vanderbilt Beach
* Task 2b Bidding Assistance & Notice to Proceed – Pelican Bay

* Task 3a Engineer of Record – Vanderbilt Beach
* Task 3b Engineer of Record – Pelican Bay

* Task 4a Surveys – Vanderbilt Beach
* Task 4b Surveys – Pelican Bay

Schedule of Work: Complete work within 270 days from the date of the Notice to Proceed which is accompanying this Work Order. The Consultant agrees that any Work Order that extends beyond the expiration date of Agreement # 18-7432-CZ will survive and remain subject to the terms and conditions of that Agreement until the completion or termination of this Work Order.

Compensation: In accordance with the Agreement referenced above, the County will compensate the Firm in accordance with following method(s): ☒Negotiated Lump Sum (NLS) ☐Lump Sum Plus Reimbursable Costs (LS+RC) ☐Time & Material (T&M) (established hourly rate – Schedule A) ☐ Cost Plus Fixed Fee (CPFF), (define which method will be used for which tasks) as provided in the attached proposal.

Task 1a	$19,868.00
Task 1b	$11,712.00
Task 2a	$2,809.00
Task 2b	$1,708.00
Task 3a	$43,694.00
Task 3b	$26,020.00
Task 4a	$28,750.00
Task 4b	$9,250.00
TOTAL FEE	$143,811.00

PREPARED BY: MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.26 15:14:40 -05'00' _____ _____

Andrew Miller, Coastal Zone Manager Date

APPROVED BY: Anthony Khawaja P.E. Digitally signed by Anthony Khawaja P.E. Date: 2025.02.26 16:06:05 -05'00' _____ _____

Jay Ahmad, Director Transportation Engineering Date

APPROVED BY: _____ _____

Trinity Scott, Department Head Date

By the signature below, the Firm (including employees, officers and/or agents) certifies, and hereby discloses, that, to the best of their knowledge and belief, all relevant facts concerning past, present, or currently planned interest or activity (financial, contractual, organizational, or otherwise) which relates to the proposed work; and bear on whether the Firm has a potential conflict have been fully disclosed.

Additionally, the Firm agrees to notify the Procurement Director, in writing within 48 hours of learning of any actual or potential conflict of interest that arises during the Work Order and/or project duration.

ACCEPTED BY: Humiston & Moore Engineers, P.A.

_____ _____

Brett Moore, President Date

(Remainder of page intentionally left blank)

IN WITNESS WHEREOF, the parties hereto, have each, respectively, by an authorized person or agent, have executed this Work Order on the date and year first written below.

ATTEST:
, Clerk of Courts

By: _____

Dated: _____
(SEAL)

_____
First Witness

_____
↑Type/print witness name↑

_____
Second Witness

_____
↑Type/print witness name↑

Approved as to Form and Legality:

_____
Assistant County Attorney

_____
Print Name

BOARD OF COUNTY COMMISSIONERS
COLLIER COUNTY, FLORIDA

By: _____
Burt L. Saunders, Chairman

Humiston & Moore Engineers, P.A.

By:_____
Signature

_____
↑Type/print signature and title↑

HUMISTON
& MOORE
ENGINEERS
COASTAL
ENGINEERING DESIGN
AND PERMITTING

5679 STRAND COURT
NAPLES, FLORIDA 34110
FAX:239 594 2025
PHONE: **239 594 2021**

February 4, 2025
(Proposal valid for 120 days.)

Andrew Miller, Principal Project Manager
Coastal Zone Management (CZM)
Collier County Government
2685 South Horseshoe Drive Unit 103
Naples, FL 34104

Re: Humiston & Moore Engineers (HM) Engineering Services for 2025 Vanderbilt and Pelican Bay Beach Renourishment Project (Contract No. 18-7432-CZ)

Dear Andy:

Enclosed is a proposal to support CZM in conducting beach renourishment activities on Vanderbilt (R22+300 to R31.5) and Pelican Bay (R31.5 to R37) beaches. HM will provide professional services including the pre-construction survey, engineering design, preparation of construction plans and technical specifications in coordination with permitting agencies for a Notice to Proceed. HM will serve as the Engineer of Record for the construction project.

Included with the project proposal is the Scope of Work, Fee Proposal, and the Rate Schedule. HM proposes to provide these services on a lump sum basis with a cost of $143,811.00 under the terms and conditions of the existing Contract No. 18-7432-CZ.

Barring any unforeseen circumstances, all work will be completed within 270 days of receiving the Notice to Proceed.

Please call if you have any questions.

Sincerely yours,

HUMISTON & MOORE ENGINEERS

Brett D. Moore, P.E.
President

EXHIBIT A
SCOPE OF WORK
VANDERBILT & PELICAN BAY BEACH
RENOURISHMENT COLLIER COUNTY, FL
January 2025

Introduction

This is a scope of work for Humiston & Moore Engineers (H&M) to provide the engineering services described below to support the County in preparing the design, plans and specifications, bidding, construction & permit documents for conducting a truck haul beach renourishment project on Vanderbilt Beach (R-22+300 to R-31.5) and Pelican Bay (R31.5 to R-37).

This proposal contains the tasks necessary to bring the project through construction. H&M will assist the County in preparing for construction by conducting analyses to determine project extents and volumes, producing construction plans and technical specifications, coordinating with FDEP for Notice to Proceed, and providing bidding assistance to the County. H&M will support the County's Inspection efforts during construction and will develop the post-construction certification based largely on the surveys, reports and observation of the work conducted by contractor during construction.

Task 1a. Design, Construction Plans & Specifications - Vanderbilt Beach $19,868.00

H&M engineers will perform engineering analysis to determine project extents and estimate volumes needed. The goal of the design will be to place material so that the project area will be able to absorb 5 to 6 years of typical erosion in order to last until the next major nourishment project, barring any major storm events. The design will be based on the matrix-design method updated with the latest composite erosion rate and the most recent annual monitoring survey which was conducted in 2024. After reviewing the preliminary volume estimates, an analysis will be conducted to optimize placement areas and volumes. H&M will finalize the quantities and fill areas based on consultation with Collier County and permitting agencies. H&M will support the County with one coordination meeting related to the project with local stakeholders as deemed necessary. H&M will consult with permit agencies and their consultants about the newest permit conditions. This will include Specific Conditions described in the November 2017 FDEP Permit No. 0331817- 004-JM., which include

- Fill history and incremental volume analysis (paragraph 1.b.)
- Refine beach design to avoid or minimize hardbottom impacts based on the latest physical and biological monitoring surveys.

Once the target volumes and placement areas have been approved by the County, H&M will conduct engineering design work to prepare the construction templates. H&M engineers will update the construction plans including plan views and cross-sections of project areas, beach access, equipment storage areas, environmental protection areas and other information required for execution of this project.

The construction plans and volumes for bidding will be based on the most recent annual physical monitoring surveys which were conducted in 2024. Technical specifications developed for the project will integrate the QA/QC plans, environmental standards, and permit conditions into the work.

H&M will assist the County in preparation of the environmental protection plan, which will be integrated into the bidding documents.

H&M understands that time is of the essence on this truck haul renourishment project and will have plans, specifications and bidding documents prepared by 7/1/2025 to allow beach renourishment to begin by 11/1/2025, provided that required documentation such as preconstruction survey data, finalized construction plans, and County approvals are conducted in a timely manner to proceed with the work.

Task 1b. Design, Construction Plans & Specifications - Pelican Bay $11,712.00

H&M engineers will perform engineering analysis to determine project extents and estimate volumes needed. The goal of the design will be to place material so that the project area will be able to absorb 5 to 6 years of typical erosion in order to last until the next major nourishment project, barring any major storm events. The design will be based on the matrix-design method updated with the latest composite erosion rate and the most recent annual monitoring survey which was conducted in 2024. After reviewing the preliminary volume estimates, an analysis will be conducted to optimize placement areas and volumes. H&M will finalize the quantities and fill areas based on consultation with Collier County and permitting agencies. H&M will support the County with one coordination meeting related to the project with local stakeholders as deemed necessary. H&M will consult with permit agencies and their consultants about the newest permit conditions. This will include Specific Conditions described in the November 2017 FDEP Permit No. 0331817- 004-JM., which include

- Fill history and incremental volume analysis (paragraph 1.b.)
- Refine beach design to avoid or minimize hardbottom impacts based on the latest physical and biological monitoring surveys.

Once the target volumes and placement areas have been approved by the County, H&M will conduct engineering design work to prepare the construction templates. H&M engineers will update the construction plans including plan views and cross-sections of project areas, beach access, equipment storage areas, environmental protection areas and other information required for execution of this project.

The construction plans and volumes for bidding will be based on the most recent annual physical monitoring surveys which were conducted in 2024. Technical specifications developed for the project will integrate the QA/QC plans, environmental standards, and permit conditions into the work.

H&M will assist the County in preparation of the environmental protection plan, which will be integrated into the bidding documents.

H&M understands that time is of the essence on this truck haul renourishment project and will have plans, specifications and bidding documents prepared by 7/1/2025 to allow beach renourishment to begin by 11/1/2025, provided that required documentation such as preconstruction survey data, finalized construction plans, and County approvals are conducted in a timely manner to proceed with the work.

Task 2a. Bidding Assistance & Notice to Proceed- Vanderbilt Beach $2,809

Once the construction plans and technical specifications are completed, H&M will provide the FDEP all Items necessary to request a Notice to Proceed (NTP) and provide the County with a bid package containing construction plans, technical specifications, project permits, bid form, contractor questionnaire, and engineer's opinion of probable costs. The questionnaire will be integrated into the technical specifications.

H&M will assist the County in their lead in the bidding process. H&M will participate in the Pre- Bid Meeting and assist the County in answering technical questions as needed during the bidding process. Once the bids have been opened, H&M will assist the County in reviewing the bids and provide a recommendation to the County based on a review of the submitted bids.

Task 2b. Bidding Assistance & Notice to Proceed- Pelican Bay $1,708.00

Once the construction plans and technical specifications are completed, H&M will provide the FDEP all Items necessary to request a Notice to Proceed (NTP) and provide the County with a bid package containing construction plans, technical specifications, project permits, bid form, contractor questionnaire, and engineer's opinion of probable costs. The questionnaire will be integrated into the technical specifications.

H&M will assist the County in their lead in the bidding process. H&M will participate in the Pre- Bid Meeting and assist the County in answering technical questions as needed during the bidding process. Once the bids have been opened, H&M will assist the County in reviewing the bids and provide a recommendation to the County based on a review of the submitted bids.

Task 3a. Engineer of Record- Vanderbilt Beach $43,694.00

As the Engineer of Record, H&M will conduct pre-, during- and post-construction tasks necessary for certification of the project. An H&M engineer will attend the pre-construction conference and update the construction profiles using County pre-placement surveys. During construction, H&M will support the County's inspection efforts and perform weekly site visits to inspect the work and attend weekly construction meetings. It is assumed that there will be up to 10 weeks of active hauling during construction. H&M will prepare a QA/QC check list, delineating the County, contractor, inspector and H&M duties as a guideline for construction coordination.

H&M will prepare a post-construction certification to meet permit requirements, based largely on surveys, weight tickets, daily reports and observations made by the contractor, County inspectors, and H&M staff. H&M will also provide a construction and as-built summary based on the contractor's as-built drawings. It is assumed that the annual physical monitoring survey and engineering report will be contracted by the County under separate work order. The third party's annual monitoring report will serve as the post-construction report and may include H&M's as-built summary as an appendix.

H&M will review the contractor's pay applications, reconcile and/or review the pay volumes/tonnage based on mine records, weights tickets collected at the beach and physical surveys. Reconciling the truck tickets with records from the mine will be a responsibility of the Contractor.

Task 3b. Engineer of Record- Pelican Bay $26,020

As the Engineer of Record, H&M will conduct pre-, during- and post-construction tasks necessary for certification of the project. An H&M engineer will attend the pre-construction conference and update the construction profiles using County pre-placement surveys. During construction, H&M will support the County's inspection efforts and perform weekly site visits to inspect the work and attend weekly construction meetings. It is assumed that there will be up to 10 weeks of active hauling during construction. H&M will prepare a QA/QC check list, delineating the County, contractor, inspector and H&M duties as a guideline for construction coordination.

H&M will prepare a post-construction certification to meet permit requirements, based largely on surveys, weight tickets, daily reports and observations made by the contractor, County inspectors, and H&M staff. H&M will also provide a construction and as-built summary based on the contractor's as-built drawings. It is assumed that the annual physical monitoring survey and engineering report will be contracted by the County under separate work order. The third party's annual monitoring report will serve as the post-construction report and may include H&M's as-built summary as an appendix.

H&M will review the contractor's pay applications, reconcile and/or review the pay volumes/tonnage based on mine records, weights tickets collected at the beach and physical surveys. Reconciling the truck tickets with records from the mine will be a responsibility of the Contractor.

Task 4a. Surveys- Vanderbilt Beach $ 28,750

H&M will utilize the most recent monitoring survey to prepare design plans for bidding. H&M and their subconsultant will collect updated survey date and construction profiles for the purpose of preparing construction plan detail prior to commence of construction. H&M will coordinate with County staff and utilize progress as-built surveys collected during construction to prepare the post construction report and certification to the regulatory agencies.

Task 4b. Surveys- Pelican Bay $ 9,250

H&M will utilize the most recent monitoring survey to prepare design plans for bidding. H&M and their subconsultant will collect updated survey date and construction profiles for the purpose of preparing construction plan detail prior to commence of construction. H&M will coordinate with County staff and utilize progress as-built surveys collected during construction to prepare the post construction report and certification to the regulatory agencies.

Summary

This work will be performed on a lump sum (LS) basis with a cost of $143,811.00 as outlined in the attached fee spreadsheet. The overall time of the contract to complete design, construction administration, and Engineer of Record signoff will be within 270 days of receipt of the Notice to Proceed.

Assumptions

- Dune restoration and dune vegetation are not part of this work assignment.
- County inspectors will collect weight tickets, observe delivered sand quality and beach construction, and reconcile sand mine records with weight tickets collected at the beach.
- The County or a third party will perform and prepare reports on the following tasks:
  - 2024 Physical Monitoring
  - Turbidity Monitoring
  - Biological Monitoring and Hardbottom Edge Surveys
  - Submerged Aquatic Vegetation Surveys
  - Marine Turtle Monitoring and Related FWC Coordination
  - Shorebird Monitoring
  - Geotechnical Analysis

Vanderbilt & Pelican Bay Beach Renourishment 2025			
Estimated Costs			
	Total Hours	**Rate**	**Cost**
1a Design, Construction Plans & Specifications - Vanderbilt Beach			
Principal	26	$231.00	$6,006.00
Engineer	30	$130.00	$3,900.00
Scientist/Geologist	10	$115.00	$1,150.00
Senior Tech	44	$103.00	$4,532.00
CADD	40	$107.00	$4,280.00
			$19,868.00
	Total Hours	**Rate**	**Cost**
1b Design, Construction Plans & Specifications - Pelican Bay			
Principal	20	$231.00	$4,620.00
Engineer	32	$130.00	$4,160.00
Scientist/Geologist	2	$115.00	$230.00
Senior Tech	20	$103.00	$2,060.00
CADD	6	$107.00	$642.00
			$11,712.00
	Total Hours	**Rate**	**Cost**
2a Bidding Assistance & Notice to Proceed - Vanderbilt Beach			
Principal	2	$231.00	$462.00
Engineer	14	$130.00	$1,820.00
Scientist/Geologist		$115.00	$0.00
Senior Tech	2	$103.00	$206.00
CADD	3	$107.00	$321.00
			$2,809.00
	Total Hours	**Rate**	**Cost**
2b Bidding Assistance & Notice to Proceed - Pelican Bay			
Principal	2	$231.00	$462.00
Engineer	8	$130.00	$1,040.00
Scientist/Geologist		$115.00	$0.00
Senior Tech	2	$103.00	$206.00
CADD		$107.00	$0.00
			$1,708.00
	Total Hours	**Rate**	**Cost**
3a Engineer of Record - Vanderbilt Beach			
Principal	60	$231.00	$13,860.00
Engineer	100	$130.00	$13,000.00
Scientist/Geologist	36	$115.00	$4,140.00
Senior Tech	90	$103.00	$9,270.00
CADD	32	$107.00	$3,424.00
			$43,694.00
	Total Hours	**Rate**	**Cost**
3b Engineer of Record - Pelican Bay			
Principal	40	$231.00	$9,240.00
Engineer	80	$130.00	$10,400.00
Scientist/Geologist	10	$115.00	$1,150.00
Senior Tech	30	$103.00	$3,090.00
CADD	20	$107.00	$2,140.00
			$26,020.00
			$105,811.00
4a Surveys - Vanderbilt Beach		SDI	**$28,750.00**
4a Surveys - Pelican Bay		SDI	**$9,250.00**
Vanderbilt Beach Totals			
	Total Hours	**Rate**	**Cost**
Principal	88	$231.00	$20,328.00
Engineer	144	$130.00	$18,720.00
Scientist/Geologist	46	$115.00	$5,290.00
Senior Tech	136	$103.00	$14,008.00
CADD	75	$107.00	$8,025.00
			$66,371.00
Surveys - Vanderbilt Beach		SDI	
		Total Vanderbilt	**$66,371.00**
Pelican Bay Totals			
	Total Hours	**Rate**	**Cost**
Principal	62	$231.00	$14,322.00
Engineer	120	$130.00	$15,600.00
Scientist/Geologist	12	$115.00	$1,380.00
Senior Tech	52	$103.00	$5,356.00
CADD	26	$107.00	$2,782.00
			$39,440.00
4a Surveys - Pelican Bay		**SDI**	
			$39,440.00
		Total:	**$143,811.00**

Sea Diversified, Inc.
160 Congress Park Drive, #114
Delray Beach, Florida 33445
Phone: 561-243-4920
Facsimile: 561-243-4957

February 4, 2025

Mr. Steve Foge, P.E.
Humiston & Moore Engineers
5679 Strand Court, Suite 110
Naples, Florida 34110

Sent via electronic mail 2/04/2025
(SF@HumistonandMoore.com)

Re: Proposal / Agreement for Professional Services
Pre-Construction Beach Profile Survey
Collier Truck Haul Project
Naples Beach
Collier County, Florida
Sea Diversified P.N. 25-3081

Dear Mr. Foge:

In accordance with your request, Sea Diversified, Inc. (SDI) is pleased to submit the following proposal for professional services. The scope of work shall include pre-construction beach profile surveys associated with the Collier Truck Haul project at Naples Beach in Collier County, Florida. In accordance with your e-mail on January 28, 2025, the survey shall be encompass beach and offshore data collection at 100-foot stations extending 150 feet from the fill template divided into two (2) ranges:

- Range One: R22+200 to R31.5 (115 Profiles)
- Range Two: R31.5 to R37+100 (37 Profiles)

General:
SDI shall provide supervision, field / office support staff and equipment to perform the scope of work described, herewith. All work shall be conducted to the highest level of industry standards and under the responsible charge of a Professional Surveyor and Mapper registered in the State of Florida. All work shall meet or exceed the Standards of Practice (Standards) set forth by the Florida Board of Professional Surveyors and Mappers in Chapter 5J-17, Florida Administrative Code, pursuant to Section 472.027, Florida Statutes, and in compliance with the Bureau of Beaches and Coastal Systems Monitoring Standards for Beach Erosion Control Projects, Sections 01000 and 01100 (Updated October 2014). If time permits, deviations from the scope of work shall be addressed via formal approved addendum to the executed Agreement for Professional Services.

Horizontal and Vertical Data:
Horizontal Datum: Feet, relative to the Florida State Plane Coordinate System, East Zone, North American Datum of 1983 (NAD83)
Vertical Datum: Feet, relative to the North American Vertical Datum of 1988 (NAVD88)

Horizontal / Vertical Control Verification
SDI will verify the horizontal and vertical position of all found and used monuments for the survey. Horizontal and vertical positions will be verified via Real-Time Kinematic GPS procedures.

Beach Profile Data Collection:
Profile data will be collected using Real-time Kinematic Differential Global Positioning techniques. Data points will be collected at a maximum interval of twenty-five (25) feet and at all grade breaks (exceeding one-foot) and material changes along the profile. The reference monument or baseline between monuments shall be recorded as range 0.0 along the profile with positive ranges extending seaward of the monument and negative ranges extending landward of the monument.

Bathymetric Data Collection:
The bathymetric survey shall be conducted using an automated hydrographic system comprised of a survey launch equipped with a marine grade, single-beam sounder, global positioning system and computer-based navigation / data collection system. An RTK (Real Time Kinematic) GPS system shall be used for vessel positioning and navigation with RTK tides applied in

real-time. The survey-grade sounder will include a 200-kHz narrow beam (3˚) transducer. This system, when calibrated to manufacturer's specifications, will yield accuracies of 1 cm plus 0.10% of the water depth when corrected for sound velocity. The sounder shall be calibrated via bar checks at the beginning of each survey day.

Data Processing and Final Deliverables

Upon completion of field survey activities, data will be edited and reduced to the project datum and translated to an x,y,z, ASCII format for submittal to Humiston & Moore (H&M). H&M will be provided the following deliverables:

1. Survey report certified by a Professional Surveyor and Mapper
2. Topographic/Bathymetric data in ASCII (x,y,z) format
3. Control Tabulation
4. DEP formatted data
5. Metadata files

Cost:

Range One: R22+200 to R31.5 (115 Profiles):	$28,750.00 Lump Sum
Range Two: R31.5 to R37+100 (37 Profiles):	$ 9,250.00 Lump Sum

Costs are based on conducting surveys along both ranges concurrently. Estimated timeframe for the survey shall be the Fall of 2025.

Should you have questions or require additional information please do not hesitate to contact us at your convenience. We appreciate this opportunity to assist you with this project and look forward to hearing from you soon.

Best Regards,

William T. Sadler Jr., P.E., P.S.M.
President
Sea Diversified, Inc.

Approved this _____ day of _____, 2025

_____
Mr. Steve Foge, P.E. or Authorized
Humiston & Moore Engineers Representative

DocuSign Envelope ID: 48AA2CF9-7EBA-4898-A562-21BE50C5C49A

* * * * *

SCHEDULE B-ATTACHMENT 1

RATE SCHEDULE

Title	Hourly Rate
Principal	**$231**
Senior Project Manager	**$203**
Project Manager	**$160**
Senior Engineer	**$177**
Engineer	**$130**
Senior Inspector	**$126**
Inspector	**$93**
Senior Planner	**$150**
Planner	**$120**
Senior Designer	**$140**
Designer	**$105**
Environmental Specialist	**$120**
Senior Environmental Specialist	**$167**
Scientist/Geologist	**$115**
Senior Scientist/Geologist	**$153**
Marine Biologist/Hydrogeologist	**$120**
Senior Marine Biologist/Hydrogeologist	**$145**
Senior GIS Specialist	**$155**
GIS Specialist	**$115**
Clerical/Administrative	**$73**
Senior Technician	**$103**
Technician	**$83**
Surveyor and Mapper	**$125**
CADD Technician	**$107**
Survey Crew - 2 man	**$145**
Survey Crew - 3 man	**$180**
Survey Crew - 4 man	**$215**
Senior Architect	**$160**
Architect	**$125**

The above hourly rates are applicable to Time and Materials task(s) only. The above list may not be all inclusive. Hourly rates for additional categories required to provide particular project services shall be mutually agreed upon by the County and firm, in writing, on a project by project basis, as needed, and will be set forth in the Work Order agreed upon by the parties.

☒ **Grant Funded**: The above rates are for purposes of providing estimate(s), as required by the grantor agency.

* * * * *

Collier County
Procurement Services Division

Direct Select Form

Request Date	Contract No.	Proposal Cost Estimate	Construction Cost Estimate
1/21/25	18-7432-CZ	$150,000	$5M

Requested By (*Use name as it appears in Outlook*):	Division / Department:
Andrew Miller	Transportation Mgmt Svcs

Administrative Agent (*If different from Requestor*):

Library Category:	Vendor Name:
Coastal Zone	Humiston & Moore Engineers PA

Work Assignment Title: 2025 Vanderbilt Beach Renourishment Design

Description of Requested Services:

Professional engineering services for the design, bidding, permitting, and construction administration for 2025 Vanderbilt Beach Renourishment.

Justification: (*Select all that apply and explain below*)	☑ Past experience with project ☐ Continuation of previous work assignment ☑ Unique qualifications ☐ Other

Comments / Explanation of Direct Select:

Humiston & Moore is a local firm, amply experienced with renourishing Collier beaches and the requirements for permitting and design needed to accomplish this project on an accelerated time frame for a November 2025 construction start. Reference PO 4500175310 and PO 4500196422.

Requestor: Andrew Miller	**Signature:** MillerAndrew Digitally signed by MillerAndrew Date: 2025.01.21 12:56:11 -05'00'	**Date:**
Division Director: Jay Ahmad	**Signature:** AhmadJay Digitally signed by AhmadJay Date: 2025.01.21 14:28:07 -05'00'	**Date:**
Procurement Director/Designee:	**Signature:** SarahHamilton Digitally signed by SarahHamilton Date: 2025.01.31 11:08:14 -05'00'	**Date:**

Please be sure to attach the fully approved form to the requisition in SAP.

Rev. January 2024

EXECUTIVE SUMMARY

Recommendation to approve a work order with APTIM Environmental & Infrastructure, LLC to provide professional engineering services for the 2025 Naples Beach Renourishment Project under Contract No. 18-7432-CZ for time and material not to exceed $149,010.40,and make a finding that this item promotes tourism (Fund 1105, Project No. 90068).

OBJECTIVE: To move forward with professional Engineering Services for the 2025 Naples Beach Renourishment Project.

CONSIDERATIONS: APTIM Environmental & Infrastructure, LLC will assist the County in conducting beach renourishment activities on Naples Beach from FDEP reference monuments R-58A to R-79. This work order will provide professional services including engineering design, preparation of construction plans and technical specifications, bidding services, coordination with permitting agencies for Notice to Proceed, and serving as the Engineer of Record for the construction event.

This item is consistent with the Quality of Place Objectives of the County's Strategic Plan.

FISCAL IMPACT: Funding in the amount of $149,010.40 is available within Tourist Development Tax Beach Renourishment Fund (1105), Project 90068 (County/Naples Beach Monitoring). The source of funding is Tourist Development Tax.

FDEP cost-share funding will be requested if eligible at a future date to reimburse Collier County for a portion of the completed work.

GROWTH MANAGEMENT IMPACT: This item is consistent with the Conservation and Coastal Management Element of the Growth Management Plan.

ADVISORY COMMITTEE RECOMMENDATIONS: This item will be presented to the Coastal Advisory Committee (CAC) on March 13, 2025, and the Tourist Development Council (TDC) on March 18, 2025.

LEGAL CONSIDERATIONS: This item is approved as to form and legality and requires majority vote for approval. – CMG

RECOMMENDATION: To approve a work order with APTIM Environmental & Infrastructure, LLC to provide professional engineering services for 2025 Naples Beach Renourishment Project under Contract No. 18-7432-CZ for time and material not to exceed $149,010.40, and make a finding that this item promotes tourism (Fund 1105, Project No. 90068).

Prepared By: Andrew Miller, P.E., Coastal Zone Management, Capital Project Planning, Impact Fees, and Program Management Division

WORK ORDER/PURCHASE ORDER

Contract 18-7432-CZ "Professional Services Library- Coastal Engineering Category"
Contract Expiration Date: March 9, 2026

This Work Order is for professional Engineering services for work known as:

Project Name: 2025 Naples Beach Renourishment
Project No: 90068.1

The work is specified in the proposal dated January 31, 2025 which is attached hereto and made a part of this Work Order. In accordance with Terms and Conditions of the Agreement referenced above, this Work Order/Purchase Order is assigned to: APTIM Environmental & Infrastructure, LLC

Scope of Work: As detailed in the attached proposal and the following:

* Task 1 Pre-Construction Survey
* Task 2 Design, Construction Plans & Specifications
* Task 3 Bidding Assistance & Notice to Proceed
* Task 4 Engineer of Record

Schedule of Work: Complete work within 270 days from the date of the Notice to Proceed which is accompanying this Work Order. The Consultant agrees that any Work Order that extends beyond the expiration date of Agreement # 18-7432-CZ will survive and remain subject to the terms and conditions of that Agreement until the completion or termination of this Work Order.

Compensation: In accordance with the Agreement referenced above, the County will compensate the Firm in accordance with following method(s): ☒Negotiated Lump Sum (NLS) ☐Lump Sum Plus Reimbursable Costs (LS+RC) ☐Time & Material (T&M) (established hourly rate – Schedule A) ☐ Cost Plus Fixed Fee (CPFF), (define which method will be used for which tasks) as provided in the attached proposal.

Task 1	$42,467.80
Task 2	$35,203.00
Task 3	$9,270.80
Task 4	$62,068.80
TOTAL FEE	$149,010.40

PREPARED BY: MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.26 15:18:43 -05'00' _____ _____
Andrew Miller, Coastal Zone Manager Date

APPROVED BY: Anthony Khawaja P.E. Digitally signed by Anthony Khawaja P.E. Date: 2025.02.27 12:35:54 -05'00' _____ _____
Jay Ahmad, Director Transportation Engineering Date

APPROVED BY: AhmadJay Digitally signed by AhmadJay Date: 2025.03.07 14:15:40 -05'00' _____ _____
Trinity Scott, Department Head Date

CAO

By the signature below, the Firm (including employees, officers and/or agents) certifies, and hereby discloses, that, to the best of their knowledge and belief, all relevant facts concerning past, present, or currently planned interest or activity (financial, contractual, organizational, or otherwise) which relates to the proposed work; and bear on whether the Firm has a potential conflict have been fully disclosed.

Additionally, the Firm agrees to notify the Procurement Director, in writing within 48 hours of learning of any actual or potential conflict of interest that arises during the Work Order and/or project duration.

ACCEPTED BY: APTIM Environmental & Infrastructure, LLC

Jeffrey Andrews Digitally signed by Jeffrey Andrews Date: 2025.03.06 11:52:42 -05'00'

Jeffrey Andrews, Director

Date

(Remainder of page intentionally left blank)

CAO

IN WITNESS WHEREOF, the parties hereto, have each, respectively, by an authorized person or agent, have executed this Work Order on the date and year first written below.

ATTEST:
, Clerk of Courts

By: _____

Dated: _____
(SEAL)

_____
First Witness

_____
↑Type/print witness name↑

_____
Second Witness

_____
↑Type/print witness name↑

Approved as to Form and Legality:

CMB

_____
Assistant County Attorney

_____
Print Name

BOARD OF COUNTY COMMISSIONERS
COLLIER COUNTY, FLORIDA

By: _____
Burt L. Saunders, Chairman

APTIM Environmental & Infrastructure, LLC

By: Jeffrey Andrews Digitally signed by Jeffrey Andrews Date: 2025.03.06 12:55:58 -05'00'
_____
Signature

_____
↑Type/print signature and title↑

CAO

APTIM
6401 Congress Avenue, Suite 140
Boca Raton, FL 33487
Tel: +1 561 391 8102
www.aptim.com

January 31, 2025

Andy Miller
Collier County Coastal Zone Management
2685 S. Horseshoe Drive, Unit 103
Naples, FL 34104

Re: Engineering Services for 2025 Naples Beach Renourishment Project (Contract No. 18-7432-CZ)

Dear Andy:

This letter is in response to Collier County's (County) request for a proposal for Aptim Environmental & Infrastructure, LLC (APTIM) to support the County in conducting beach renourishment activities on Naples Beach (R58A-R79) beaches. APTIM will perform professional services including pre-construction survey, engineering design, preparation of construction plans and technical specifications, coordination with permitting agencies for a Notice to Proceed, and serve as the Engineer of Record for the construction event.

Included as Exhibits are: the Scope of Work (Exhibit A), Fee Proposal (Exhibit B), and the Rate Schedule (Exhibit C). APTIM proposes to provide these services on a lump sum basis with a cost of $149,010.40 under the terms and conditions of the existing Contract No. 18-7432-CZ and as amended May 7, 2020. Barring any unforeseen circumstances, all work will be completed within 270 days of receiving the Notice to Proceed.

Sincerely,

Nicole S. Sharp, P.E.
Director, Coastal Sciences & Engineering
Aptim Environmental & Infrastructure, LLC

cc: James Austin, P.E., APTIM
Steve Keehn, P.E., APTIM

CAO

APTIM

Exhibit A

Scope of Work

CAO

EXHIBIT A
SCOPE OF WORK
2025 NAPLES BEACH RENOURISHMENT PROJECT
COLLIER COUNTY, FL
JANUARY 2025

Introduction

This is a scope of work for Aptim Environmental & Infrastructure, LLC (APTIM) to provide the engineering services described below to support the County in preparing the pre-construction survey, design, plans and specifications, bidding, construction & permit documents for conducting a truck haul beach renourishment project on Naples Beach (R-58A to R-79).

This proposal contains the tasks necessary to bring the project through construction. APTIM will assist the County in preparing for construction by conducting analyses to determine project extents and volumes, producing construction plans and technical specifications, coordinating with FDEP for Notice to Proceed, and providing bidding assistance to the County. APTIM will support the County's inspection efforts during construction and will develop the post-construction certification based largely on the surveys, reports and observation of the contractor and the County during construction.

1. Pre-Construction Survey

This task includes pre-construction survey services for 204 profiles from R-58A-500 to R-79. This includes 25 Depth of Closure (DOC) lines at FDEP monuments and necessary intermediates, as well as 179 upland and wading depth lines at 100' spacing between FDEP monuments. The 179 upland and wading depth lines will extend seaward to 150' past the construction toe of fill, and will at least extend landward of the landward limit of fill.

Prior to the start of the survey, reconnaissance of published National Geodetic Survey (NGS) and/or FDEP 2nd order control monuments will be conducted to confirm that survey control is in place and undisturbed. Global Navigation Satellite System (GNSS) techniques will be used to locate and confirm survey control for this project.

Horizontal and vertical positioning checks will be conducted at the beginning and end of each survey day using at least two (2) 2nd order monuments or TBMs in the project area. All survey data collected will meet the vertical accuracy required for this survey as outlined in FDEP monitoring standards of 0.16' US survey feet.

The horizontal positions will be collected in United States (U.S.) survey feet relative to the North American Datum of 1983/1990 (NAD 83/90), FIPS Florida East (0901) State Plane. All vertical data will be collected in U.S. survey feet relative to the North American Vertical Datum of 1988 (NAVD 88).

Surveyors will collect upland and nearshore portions of the cross-section using GNSS rovers. Offshore sections of the profiles will be collected using an Teledyne Marine E20 sounder with digitizer on the survey vessel, with a centrally located hull-mounted transducer. A Trimble GNSS and a dynamic motion sensor (or similar) will be used onboard the survey vessel to provide instantaneous tide corrections as well as attitude corrections. To maintain the vessel navigation

CAO

along the profile lines, HYPACK navigation software will be used for real time navigation and data acquisition.

The sounder will be calibrated with a sound velocity probe and conventional bar-check at the beginning and end of each survey day. Bar-checks will be performed as a redundant calibration from a depth of five (5) feet to a minimum depth of twenty (20) feet. Tide readings will be taken while conducting the onshore portion of the profile to verify onboard tide readings.

All work shall be conducted under the direct supervision of a licensed Florida Professional Surveyor and Mapper as well as an American Congress of Surveying and Mapping Certified Hydrographer and will be in accordance with Chapter 5J-17 Florida Administrative Code (F.A.C.) pursuant to Chapter 472 of the Florida Statutes (FS) as well as the May 2014 FDEP Monitoring Standards for Beach Erosion Control Projects, Sections 01000 and 01100.

Deliverables for this task will include XYZ ASCII data and a pdf of profile plots.

2. Design, Construction Plans & Specifications

APTIM engineers will perform engineering analysis to determine project extents and estimate volumes needed. The goal of the design will be to place material so that the project area will be able to absorb 5 to 6 years of typical erosion in order to last until the next major nourishment project, barring any major storm events. The design will be based on the matrix design method updated with the latest composite erosion rate and 2025 pre-construction survey. After review of the preliminary volume estimates, an analysis will be conducted to optimize placement areas and volumes. APTIM will finalize the quantities and fill areas based on consultation with Collier County and permitting agencies. APTIM will support the County with one coordination meeting related to the project with local stakeholders.

APTIM will consult with permit agencies and their consultants, about the newest permit conditions. This will include Specific Conditions described in the November 2017 FDEP Permit No. 0331817-004-JM., which include

- Fill history and incremental volume analysis
- Refine beach design to avoid or minimize hardbottom impacts based on the latest physical and biological monitoring surveys.

Once the target volumes and placement areas have been approved by the County, APTIM will conduct engineering design work to prepare the construction templates. APTIM's GIS/CAD professionals will work directly with APTIM engineers to update the construction plans including plan views and cross-sections of project areas, beach access, equipment storage areas, environmental protection areas and other information required for execution of this project.

The construction plans and volumes for bidding will be based on the 2025 pre-construction surveys performed by APTIM (Task 1). Technical specifications developed for the project will integrate the QA/QC plans, environmental standards, and permit conditions into the work. APTIM will assist the County in preparation of the environmental protection plan, which will be integrated into the bidding documents.

APTIM understands that time is of the essence on this truck haul renourishment project and will have plans, specifications and bidding documents prepared 50 days after receipt of NTP to allow

beach renourishment to begin by 11/1/2025, provided that required documentation such as survey data from others and County approvals are received in a timely manner to proceed with the work.

3. Bidding Assistance & Notice to Proceed

Once the construction plans and technical specifications are completed, APTIM will provide the FDEP all items necessary to request a Notice to Proceed (NTP) and provide the County with a bid package containing: construction plans, technical specifications, project permits, bid form, contractor questionnaire, and engineer's opinion of probable costs. The questionnaire will be integrated into the technical specifications.

APTIM will assist the County in their lead of the bidding process. APTIM will participate in the Pre-Bid Meeting via phone conference, and assist the County in answering technical questions as needed during the bidding process. Once the bids have been opened, APTIM will assist the County in reviewing the bids and provide a recommendation to the County based on a review of the submitted bids.

4. Engineer of Record

As the Engineer of Record, APTIM will conduct pre-, during- and post-construction tasks necessary for certification of the project. An APTIM engineer will attend the pre-construction conference and update the construction profiles using the pre-construction surveys (Task 1). During construction, APTIM will support the County's inspection efforts and perform weekly site visits to inspect the work and attend weekly construction meetings. It is assumed that there will be up to 10 weeks of active hauling during construction. APTIM will prepare a QA/QC check list, delineating the County, contractor, inspector and APTIM duties as a guideline for during construction coordination.

APTIM will prepare a post-construction certification to meet permit requirements, based largely on surveys, weight tickets, daily reports and observations made by the contractor and County inspectors. APTIM will also provide a construction and as-built summary based on the contractor's as-built drawings. It is assumed that the annual physical monitoring survey and engineering report will be contracted by the County under separate work order. The third party's annual monitoring report will serve as the post-construction report and may include APTIM's as-built summary as an appendix.

APTIM will review the contractor's pay applications, reconcile and/or review the pay volumes/tonnage based on mine records, weights tickets collected at the beach and physical surveys.

Summary

This work will be performed on a lump sum (LS) basis with a cost of $149,010.40 as outlined in the attached fee spreadsheet. The overall time of the contract to complete the surveys, design, construction administration, and Engineer of Record signoff will be within 270 days of receipt of the Notice to Proceed.

Assumptions

- Dune restoration and dune vegetation are not part of this work assignment.

- County inspectors will collect weight tickets, observe delivered sand quality and beach construction, and reconcile sand mine records with weight tickets collected at the beach.
- The County or a third party will perform and prepare reports on the following tasks:
  - 2026 Physical Monitoring
  - Turbidity Monitoring
  - Biological Monitoring and Hardbottom Edge Surveys
  - Submerged Aquatic Vegetation Surveys
  - Marine Turtle Monitoring and Related FWC Coordination
  - Shorebird Monitoring

CAO

APTIM

Exhibit B

Fee Proposal

CAO

EXHIBIT B

ESTIMATED FEE PROPOSAL FOR
2025 Naples Beach Renourishment Project
Collier County

January 29, 2025

	Task Item	Cost	LABOR COSTS												TRAVEL COSTS			Equipment							
			Principal	Senior Project Manager	Engineer	Senior Marine Biologist/ Hydrogeologist	Marine Biologist/ Hydrogeologist	Senior GIS Specialist	CADD Technician	Surveyor and Mapper	Senior Scientist/ Geologist	Scientist/ Geologist	Survey Crew - 2 man	Survey Crew - 3 man	Clerical/ Administrative	Mileage	Tolls	Meals	Survey Boat 24'	RTK GPS	Heave, Pitch & Roll Compensator	Speed of Sound Velocity Meter	Hypack/ Hysweep Navigation System	Odom Hydrotrac Sounder	Digital Camera	UTV and Trailer Rental
			(Hours)	(Hours)	(Hours)	(Hours)	(Hours)	(Hours)	(Hours)	(Hours)	(Hours)	(Hours)	(Hours)	(Hours)	(Hours)				(Days)	(Days)	(Days)	(Days)	(Days)	(Days)	(Days)	(Days)
1	Pre-Construction Survey	$42,467.80	1		1					10			40	148		440	4	36	1	8	1	1	1	1	8	8
2	Design, Construction Plans & Specifications	$35,293.00	22	24	110	16	10	4	56	2	2	1			2											
3	Bidding Assistance & Notice to Proceed	$9,270.80	16	4	20	6			8						1	440	2	4								
4	Engineer of Record	$62,068.80	32	52	230	24	12	4	50	8					4	2,640	18	18								
		Total Hours =	71	80	361	46	22	8	114	20	2	1	40	148	7	3,520	24	58	1	8	1	1	1	1	8	8
		Rate =	$231	$203	$130	$145	$120	$155	$107	$125	$153	$115	$145	$180	$73	$0.445	$12.00	$36.00	$790.000	$495.00	$215.00	$63.000	$260.00	$165.00	$10.00	$168.00
		Cost =	$16,401	$16,240	$46,930	$6,670	$2,640	$1,240	$12,198	$2,500	$306	$115	$5,800	$26,640	$511	$1,566.40	$288.00	$2,088.00	$790.00	$3,960.00	$215.00	$63.00	$260.00	$165.00	$80.00	$1,344.00
	LUMP SUM TOTAL	$149,010.40																								

CAO

APTIM

Exhibit C

Rate Schedule

CAO

* * * * *

SCHEDULE B-ATTACHMENT 1

RATE SCHEDULE

Title	Hourly Rate
Principal	**$231**
Senior Project Manager	**$203**
Project Manager	**$160**
Senior Engineer	**$177**
Engineer	**$130**
Senior Inspector	**$126**
Inspector	**$93**
Senior Planner	**$150**
Planner	**$120**
Senior Designer	**$140**
Designer	**$105**
Environmental Specialist	**$120**
Senior Environmental Specialist	**$167**
Scientist/Geologist	**$115**
Senior Scientist/Geologist	**$153**
Marine Biologist/Hydrogeologist	**$120**
Senior Marine Biologist/Hydrogeologist	**$145**
Senior GIS Specialist	**$155**
GIS Specialist	**$115**
Clerical/Administrative	**$73**
Senior Technician	**$103**
Technician	**$83**
Surveyor and Mapper	**$125**
CADD Technician	**$107**
Survey Crew - 2 man	**$145**
Survey Crew - 3 man	**$180**
Survey Crew - 4 man	**$215**
Senior Architect	**$160**
Architect	**$125**

The above hourly rates are applicable to Time and Materials task(s) only. The above list may not be all inclusive. Hourly rates for additional categories required to provide particular project services shall be mutually agreed upon by the County and firm, in writing, on a project by project basis, as needed, and will be set forth in the Work Order agreed upon by the parties.

☒ **Grant Funded**: The above rates are for purposes of providing estimate(s), as required by the grantor agency.

* * * * *

CAO

CAO

Collier County
Procurement Services Division

Direct Select Form

Request Date	Contract No.	Proposal Cost Estimate	Construction Cost Estimate
1/21/25	18-7432-CZ	$150,000	$5M

Requested By (*Use name as it appears in Outlook*):	Division / Department:
Andrew Miller	Transportation Mgmt Svcs

Administrative Agent (*If different from Requestor*):

Library Category:	Vendor Name:
Coastal Zone	Aptim Envrironmental & Infrastructure, LLC

Work Assignment Title: 2025 Naples Beach Renourishment Design

Description of Requested Services:

Professional engineering services for the design, bidding, permitting, and construction administration for 2025 Naples Beach Renourishment.

Justification: (*Select all that apply and explain below*)	
	☑ Past experience with project
	☐ Continuation of previous work assignment
	☑ Unique qualifications
	☐ Other

Comments / Explanation of Direct Select:

APTIM has designed multiple County beach renourishment projects and are very experienced with the requirements for permitting and design needed to accomplish this project on an accelerated time frame for a November 2025 construction start. Reference PO 4500231654.

Requestor: Andrew Miller	**Signature:** MillerAndrew Digitally signed by MillerAndrew Date: 2025.01.21 13:01:54 -05'00'	**Date:**
Division Director: Jay Ahmad	**Signature:** AhmadJay Digitally signed by AhmadJay Date: 2025.01.21 14:28:46 -05'00'	**Date:**
Procurement Director/Designee:	**Signature:** SarahHamilton Digitally signed by SarahHamilton Date: 2025.01.31 10:48:26 -05'00'	**Date:**

Please be sure to attach the fully approved form to the requisition in SAP.

Rev. January 2024

CAO

EXECUTIVE SUMMARY

Recommendation to approve a work order with APTIM Environmental & Infrastructure, LLC to provide professional engineering services for 2026-2027 Local Government Funding Request under Contract No. 18-7432-CZ for time and material not to exceed $28,462 and make a finding that this item promotes tourism (Fund 195, Project No. 90065).

OBJECTIVE: To move forward with preparation of the 2026-2027 Local Government Funding Request (LGFR) for Collier County's shore protection projects.

CONSIDERATIONS: APTIM Environmental & Infrastructure, LLC (APTIM) will assist the County with Preparation of the 2026-2027 LGFR for Collier County's shore protection projects; South Marco Island and Collier County Beach Renourishment projects; and the County's inlet projects: Wiggins Pass and Doctors Pass. APTIM will evaluate all the elements of the coastal projects as they apply to the Florida Administrative Code and the LGFR application and guidance documents will be evaluated to increase Florida Department of Environmental Protection (FDEP) ranking and cost-sharing opportunities where applicable. Additionally, APTIM will update the application response to account for the modification of the LGFR based on the latest rating guidelines, rules, and current project cost information. Once APTIM has completed a draft of the LGFR application, they will provide it to Collier County for review and comment prior to submittal to FDEP. Collier County participates in the LGFR process annually.

FDEP will review the application and may request additional information (RAI). APTIM will respond to FDEP's RAI and provide additional information to the FDEP on behalf of Collier County as needed. FDEP then reviews the applications in detail and provides initial project rankings and initial project assessments. Collier County can to respond to the initial project assessment. APTIM will then perform a review of the initial project assessment on behalf of Collier County and, if warranted, prepare a letter on behalf of the County to the FDEP identifying the area within the application that may provide additional points to the County. The County will issue a Work Order under Contract No. 18-7432-CZ, which was approved by the BCC on March 10, 2020, item 16.E.4.

This item is consistent with the Infrastructure and Asset Management element of Collier County's Strategic Plan by preparing for the impacts of natural disasters on our critical infrastructure and natural resources.

FISCAL IMPACT: Funding for the proposed work order, in the amount of $28,462, is available in the Tourist Development Tax Fund (195), Project No. 90065, FDEP LGFR Analysis. The source of funding is Tourist Development Tax. Funding for this work order will not be requested for reimbursement from any grantor agency.

GROWTH MANAGEMENT IMPACT: This item is consistent with the Conservation and Coastal Management Element of the County's Growth Management Plan.

ADVISORY COMMITTEE RECOMMENDATIONS: This item will be presented to the Coastal Advisory Committee (CAC) on March 13, 2025 and the Tourist Development Council (TDC) on March 18, 2025.

LEGAL CONSIDERATIONS: This item is approved as to form and legality and requires majority vote for approval. – CMG

RECOMMENDATION: To approve a work order with APTIM Environmental & Infrastructure, LLC to provide professional engineering services for 2026-2027 Local Government Funding Request under Contract No. 18-7432-CZ for time and material not to exceed $28,462 and make a finding that this item promotes tourism (Fund 195, Project No. 90065).

Prepared By: Andrew Miller, P.E., Coastal Zone Management, Capital Project Planning, Impact Fees, and Program Management Division

WORK ORDER/PURCHASE ORDER

Contract 18-7432-CZ "Professional Services Library Coastal Engineering Category"
Contract Expiration Date: March 9, 2026

This Work Order is for professional Engineering Services for work known as:

Project Name: FDEP LGFR Analysis
Project No: 90065.1

The work is specified in the proposal dated February 12, 2025, which is attached hereto and made a part of this Work Order. In accordance with Terms and Conditions of the Agreement referenced above, this Work Order/Purchase Order is assigned to: APTIM Environmental & Infrastructure, LLC.

Scope of Work: As detailed in the attached proposal and the following:

* Task 1 South Marco Beach LGFR Application
* Task 2 North County Beaches & Doctors Pass LGFR Application
* Task 3 Wiggins Pass LGFR Application

Schedule of Work: Complete work within 210 days from the date of the Notice to Proceed which is accompanying this Work Order. The Consultant agrees that any Work Order that extends beyond the expiration date of Agreement # 18-7432-CZ will survive and remain subject to the terms and conditions of that Agreement until the completion or termination of this Work Order.

Compensation: In accordance with the Agreement referenced above, the County will compensate the Firm in accordance with following method(s): ☐Negotiated Lump Sum (NLS) ☐Lump Sum Plus Reimbursable Costs (LS+RC) ☒Time & Material (T&M) (established hourly rate – Schedule A) ☐ Cost Plus Fixed Fee (CPFF), as provided in the attached proposal.

Task 1	$ 9,098.00
Task 2	$ 10,266.00
Task 3	$ 9,098.00
TOTAL FEE	$ 28,462.00

PREPARED BY: MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.26 06:37:21 -05'00' _____ _____

Andrew Miller, Manager - CZM Date

APPROVED BY: Anthony Khawaja P.E. Digitally signed by Anthony Khawaja P.E. Date: 2025.02.26 08:57:06 -05'00' _____ _____

Jay Ahmad, Division Director Date

APPROVED BY: _____ _____

Trinity Scott, Department Head Date

By the signature below, the Firm (including employees, officers and/or agents) certifies, and hereby discloses, that, to the best of their knowledge and belief, all relevant facts concerning past, present, or currently planned interest or activity (financial, contractual, organizational, or otherwise) which relates to the proposed work; and bear on whether the Firm has a potential conflict have been fully disclosed.

Additionally, the Firm agrees to notify the Procurement Director, in writing within 48 hours of learning of any actual or potential conflict of interest that arises during the Work Order and/or project duration.

ACCEPTED BY: APTIM Environmental & Infrastructure, LLC

Nicole Sharp, Program Manager	Date

(Remainder of page intentionally left blank)

IN WITNESS WHEREOF, the parties hereto, have each, respectively, by an authorized person or agent, have executed this Work Order on the date and year first written below.

ATTEST:
, Clerk of Courts

By: _____

Dated: _____
(SEAL)

BOARD OF COUNTY COMMISSIONERS
COLLIER COUNTY, FLORIDA

By: _____
Burt L. Saunders , Chairman

APTIM Environmental & Infrastructure, LLC.

By:_____
Signature
Nicole Sharp, Program Manager
↑Type/print signature and title↑

_____
First Witness

_____
↑Type/print witness name↑

_____
Second Witness

_____
↑Type/print witness name↑

Approved as to Form and Legality:

_____
Assistant County Attorney

_____
Print Name

APTIM
6401 Congress Avenue, Suite 140
Boca Raton, FL 33487
Tel: +1 561 391 8102
www.aptim.com

February 12, 2025

Andy Miller
Collier County Coastal Zone Management
2685 S. Horseshoe Drive
Naples, FL 34104

Re: 2026-2027 Local Government Funding Request (LGFR) Preparation
Collier County, Contract No. 18-7432-CZ

Dear Andy:

This letter is in response to Collier County's (County) request for a proposal for support services from Aptim Environmental & Infrastructure, LLC (APTIM). The services will include funding and technical support to assist the County with submittal of the 2026-2027 Local Government Funding Requests (LGFR) for Collier County's: South Marco Island Beach Renourishment Project, North County Beach Renourishment Program including Doctors Pass, and the County's inlet project at Wiggins Pass.

Included as Exhibits are: Scope of Work (Exhibit A), Estimated Fee Proposal (Exhibit B), and Rates Schedule (Exhibit C). APTIM proposes to provide these services on a time and materials basis not-to-exceed $28,462.00 under the terms and conditions of the existing Contract No. 18-7432-CZ dated March 10, 2020, and as amended May 7, 2020. Barring any unforeseen circumstances, all work will be completed within 210 days of receiving the Notice to Proceed.

Sincerely,

Nicole S. Sharp, P.E.
Director, Coastal Sciences & Engineering
Aptim Environmental & Infrastructure, LLC

_____
Client Authorized Signature

_____
Name

_____
Title

cc: Erica Carr-Betts, APTIM

Exhibit A
Scope of Work

2026-2027 Local Government Funding Requests (LGFR)
Collier County, Florida
Scope of Work

Introduction

To distribute state funds for shore protection and inlet management projects, the Florida Department of Environmental Protection (FDEP) requests that local sponsors submit an annual Local Government Funding Request (LGFR) for their projects. This scope of work details the tasks required to assist the County with preparing and submitting the 2026-2027 LGFRs to the FDEP and responding to both the FDEP's Application Review and Project Assessment for Collier County's South Marco and North County Beach Renourishment projects, and inlet maintenance projects at Doctors Pass, and Wiggins Pass. Once a draft of the LGFR applications have been completed, a copy will be provided to Collier County for review and comment prior to Collier County submittal to the FDEP.

Following application submission, the FDEP will review the application in detail and provide initial project rankings and initial project assessments. APTIM will perform a review of the initial project assessment on behalf of Collier County and, if warranted, provide the County with a draft letter to the FDEP identifying the areas within the applications that may provide additional points to the County.

1. South Marco Beach LGFR Application

APTIM will assist the County with preparation of the 2026-2027 LGFR for Collier County's South Marco Island Renourishment Project. Building upon past LGFR applications, APTIM will update the application response to account for updates to the project. All the elements of the projects as they apply to the 62B-36 Rule and the LGFR application and guidance document will be evaluated to optimize FDEP ranking and cost sharing opportunities where practical. Additionally, maps will be updated and the FDEP's application response will be reviewed and, if required, a response to the draft assessment will be completed.

2. North County Beaches & Doctors Pass LGFR Application

APTIM will assist the County with preparation of the 2026-2027 LGFR for Collier County's North County beaches (Vanderbilt, Park Shore, and Naples Beach) and Doctors Pass projects. Building upon past LGFR applications, APTIM will update the application response to account for current project status and cost information. All the elements of the projects as they apply to the 62B-36 Rule and the LGFR application and guidance, documents will be evaluated to optimize FDEP ranking and cost sharing opportunities where practical. Additionally, maps will be updated and the FDEP's application response will be reviewed and, if required, a response to the draft assessment will be completed.

3. Wiggins Pass LGFR Application

APTIM will assist the County with preparation of the 2026-2027 LGFR for Collier County's Wiggins Pass inlet maintenance project. All the elements of the project as they apply to the 62B-36 Rule, LGFR application, and guidance document will be evaluated to increase FDEP ranking and cost sharing opportunities where practical. Additionally, maps will be updated and the FDEP's application response will be reviewed and, if required, a response to the draft assessment will be completed.

Exhibit B
Estimated Fee Proposal

ESTIMATED FEE PROPOSAL FOR
2026-2027 LOCAL GOVERNMENT FUNDING REQUEST (LGFR) PREPARATION
COLLIER COUNTY, Contract No. 18-7432-CZ

February 12, 2025

	Task Item	Cost	Principal (Hours)	Senior Engineer (Hours)	Engineer (Hours)	GIS Specialist (Hours)	Clerical/ Administrative (Hours)
1	**South Marco Beach LGFR Application**	**$9,098.00**	8	24	12	10	4
2	**North County Beaches & Doctors Pass LGFR Application**	**$10,266.00**	8	28	12	14	4
3	**Wiggins Pass LGFR Application**	**$9,098.00**	8	24	12	10	4
		Total Hours =	24	76	36	34	12
		Rate =	$231	$177	$130	$115	$73
		Cost =	$5,544	$13,452	$4,680	$3,910	$876

TOTAL $28,462.00

Exhibit C
Rate Schedule

DocuSign Envelope ID: 80B82885-B471-4CCC-BC63-021FDAD6CE8B

* * * * *

SCHEDULE B-ATTACHMENT 1

RATE SCHEDULE

Title	Hourly Rate
Principal	**$231**
Senior Project Manager	**$203**
Project Manager	**$160**
Senior Engineer	**$177**
Engineer	**$130**
Senior Inspector	**$126**
Inspector	**$93**
Senior Planner	**$150**
Planner	**$120**
Senior Designer	**$140**
Designer	**$105**
Environmental Specialist	**$120**
Senior Environmental Specialist	**$167**
Scientist/Geologist	**$115**
Senior Scientist/Geologist	**$153**
Marine Biologist/Hydrogeologist	**$120**
Senior Marine Biologist/Hydrogeologist	**$145**
Senior GIS Specialist	**$155**
GIS Specialist	**$115**
Clerical/Administrative	**$73**
Senior Technician	**$103**
Technician	**$83**
Surveyor and Mapper	**$125**
CADD Technician	**$107**
Survey Crew - 2 man	**$145**
Survey Crew - 3 man	**$180**
Survey Crew - 4 man	**$215**
Senior Architect	**$160**
Architect	**$125**

The above hourly rates are applicable to Time and Materials task(s) only. The above list may not be all inclusive. Hourly rates for additional categories required to provide particular project services shall be mutually agreed upon by the County and firm, in writing, on a project by project basis, as needed, and will be set forth in the Work Order agreed upon by the parties.

☒ **Grant Funded**: The above rates are for purposes of providing estimate(s), as required by the grantor agency.

* * * * *

Collier County
Procurement Services Division

Direct Select Form

Request Date	Contract No.	Proposal Cost Estimate	Construction Cost Estimate
	18-7432-CZ	$27,000	N/A

Requested By (*Use name as it appears in Outlook*):	**Division / Department:**
Andrew Miller	Transportation Management / Coastal Zone

Administrative Agent (*If different from Requestor*):

Library Category: Coastal Engineering	**Vendor Name:** APTIM Environmental & Infrastructure, LLC

Work Assignment Title: Professional Support Services 2026-2027 LGFR

Description of Requested Services:

APTIM will assist the County with preparation of the 2026-2027 LGFR (Local Government Funding Request) for Collier County's South Marco Island Beach Renourishment Project, North County Beach Renourishment program including Doctors Pass, and the County's inlet project at Wiggins Pass.

Justification: (*Select all that apply and explain below*)	☑ Past experience with project ☐ Continuation of previous work assignment ☐ Unique qualifications ☐ Other

Comments / Explanation of Direct Select:

APTIM prepares the LGFR applications annually and provides cost effective and efficient services due to their previous experience. (FY24 PO 4500230418)

Requestor: Andrew Miller	**Signature:** MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.04 08:20:50 -05'00'	**Date:**
Division Director: Jay Ahmad	**Signature:** AhmadJay Digitally signed by AhmadJay Date: 2025.02.04 08:47:04 -05'00'	**Date:**
Procurement Director/Designee:	**Signature:** SarahHamilton Digitally signed by SarahHamilton Date: 2025.02.05 14:01:50 -05'00'	**Date:**

Please be sure to attach the fully approved form to the requisition in SAP.

EXECUTIVE SUMMARY

Recommendation to approve Change Order No. 3 for contract No. 24-8292 with Earth Tech Enterprises, Inc. for the Park Shore Beach Renourishment, increasing the contract amount by $7,000; and make a finding that this item promotes tourism (Project 90067).

OBJECTIVE: To process a change order for construction contract 24-8292 for the 2024 truck haul beach renourishment project at Park Shore, increasing the contract amount by $7,000.

CONSIDERATIONS: On December 10, 2024, (Item 16.B.14), the Board of County Commissioners (the "Board") approved contract 24-8292 Park Shore Beach Renourishment, with Earth Tech Enterprises, Inc., in the amount of $3,817,530.

Shortly after the project started, the Sea House Condominium contacted staff and advised that they would not agree to a standard Temporary Beach Restoration Easement and required a Beach Access License Agreement before allowing the County to proceed with renourishment on their property. As the contractor advanced beach fill activities, staff directed the contractor to forego filling at Sea House until an agreement was reached. A Beach Access License Agreement was agreed to on February 7, 2025. At that time the contractor had advanced the beach fill operation well to the south of Sea House Condominium. It is important to the County's design that all properties in Park Shore are filled to the design template to ensure sustainability of design and protection of upland properties. Completion of this design serves a public purpose.

On February 19, 2025, staff issued a written Work Directive to the contractor to fill the beach at Sea House Condominium. Since hauling northward will damage the newly constructed beach, the contractor needs to re-work the damaged beach by re-blading the previously completed section.

Filling the beach at the Sea House parcel is important so that the new beach berm is a continuous elevation providing protection to upland properties without a gap in the berm.

A summary of the changes identified in the Work Directive is shown below:

- Return operations to beach at Sea House parcel approximately R-45+700 to fill per design template.
- Re-blade completed beach to remove ruts from hauling activities between Sea House and Horizon Way.

This item is consistent with the Quality of Place Objectives of the County's Strategic Plan.

FISCAL IMPACT: Change Order #3 increases the overall contract by $7,000. The additional funding is available with the TDC Beach Renourishment Fund (1105), Project 90067. The source of funding is Tourist Development Tax.

FDEP cost-share funding will be requested if eligible at a future date to reimburse Collier County for a portion of the completed work.

GROWTH MANAGEMENT IMPACT: This item is consistent with the Conservation and Coastal Management Element of the Growth Management Plan.

ADVISORY COMMITTEE RECOMMENDATIONS: This item will be presented to the Coastal Advisory Committee (CAC) on March 13, 2025, and the Tourist Development Council (TDC) on March 18, 2025.

LEGAL CONSIDERATIONS: This item is approved as to form and legality and requires majority vote for approval. – CMG

RECOMMENDATION: To approve Change Order No. 3 for contract No. 24-8292 with Earth Tech Enterprises,

Inc. for the Park Shore Beach Renourishment, increasing the contract amount by $7,000; and make a finding that this item promotes tourism (Project 90067).

Prepared By: Andrew Miller, P.E., Coastal Zone Management, Transportation Engineering Division

Collier County

Procurement Services Change Order Form

Contract# 24-8292 **CO#** 3 **PO#** 4500236559 **Project #:** 90067

Project Name: 2024 Park Shore Renourishment

Contractor/Consultant Name: Earth Tech Enterprises, Inc.

Select One: ☑ **Contract Modification (Construction or Project Specific)** ☐ **Work Order Modification**

Project Manager Name: Andrew Miller **Division Name:** Transportation Engineering

Original Contract/Work Order Amount	$3,817,530.00	12/10/2024 16.B.14	**Original BCC Approval Date; Agenda Item #**
Current BCC Approved Amount	$6,556,683.00	2/25/2025 16.B.9	**Last BCC Approval Date; Agenda Item #**
Current Contract/Work Order Amount	$6,556,683.00	5/2/2025	**SAP Contract Expiration Date (MASTER)**
Dollar Amount of this Change	$7,000.00	71.94%	**Total % Change from Original Amount**
Revised Contract/Work Order Total	$6,563,683.00	0.11%	**% Change from Current BCC Approved Amount**
Total Cumulative Changes	$2,746,153.00	0.11%	**% Change from Current Amount**

Notice to Proceed Date 1/2/2025 **Original NTP # of Days** 75 **Original Final Completion Date** 3/18/2025 **Last Final Approved Date** 5/2/2025

# of Days Added 0 **Revised Final Date** (includes this change) N/A **Current Substantial Completion Date** (if applicable) 4/2/2025

Provide responses after each question in box below (Responses should be **brief and specific**). Attach additional information and/or documentation from the Design Professional and/or Contractor, if needed, with your submission of this Change Order and complete summary on next page. **Check all that apply to this Change Order request:** ☐ **Add Time;** ☑ **Add funds**; ☐ **Use of Allowance;** ☐ **Modify/Delete existing Task(s);** ☐ **Add new Task(s);** ☐ **Reallocate funds;** ☐ **Other** (must be explained in detail below)

1.) This Change Order will add $7,000 to re-blade the newly constructed beach after filling the skipped parcel at sea House

2.) "N/A"

3.) This change was not included in the contract because the original intent was to construct the beach linearly without gaps. Unfortunately the county did not have a right-of-access agreement in place when the construction reached this area.

4.) If the change is not processed, the skipped parcel will not be re-nourished, introducing a gap in the protection provided by the filled beach.

Collier County

Procurement Services Change Order Form

Contract# 24-8292 **CO#** 3 **PO#** 4500236559 **Project #:** 90067

Project Name: 2024 Park Shore Renourishment

Contractor/Consultant Name: Earth Tech Enterprises, Inc.

Change Order/Amendment Summary

(If additional spaces needed, attached a separate Summary page to this amendment request)

CO#	AMD#	Description	COST		TIME		Justification
			Additive (+)	Deductive (-)	Days Added	Total New Time	
1		add additional time to continue renourishment			15	90	project sand volume increased due to previous storm season
2		add additional time, additional funding and the use of the allowance funds of $254,000	$2,739,153		30	120	Increased volume is necesssary to provide County design standard beach width
3		add additional funding to close the gap at Sea House Condos	$7,000				right-of-access agreement was delayed

☐ Check here if additional summary page/s are attached to this Change Order

Collier County

Procurement Services Change Order Form

Contract# 24-8292	**CO#** 3	**PO#** 4500236559	**Project #:** 90067

Project Name: 2024 Park Shore Renourishment

Contractor/Consultant Name: Earth Tech Enterprises, Inc.

Acceptance of this Change Order shall constitute a modification to contract / work order identified above and will be subject to all the same terms and conditions as contained in the contract / work order indicated above, as fully as if the same were stated in this acceptance. The adjustment, if any, to the Contract shall constitute a full and final settlement of any and all claims of the Contractor / Vendor / Consultant / Design Professional arising out of or related to the change set forth herein, including claims for impact and delay costs.

Contractor/Consultant/Design Professional signature below must be from an authorized person/officer/director of the Company or listed as the qualified licensed Professional "Project Coordinator" or Design/Engineer Professional under the agreement. Signature authority of person signing will be verified through the contract OR through the Florida Department of State, Division of Corporations (Sunbiz) website (https://dos.myflorida.com/sunbiz/search/). If the person signing is not listed, we will require signature authority by one of the listed officers/directors of the company giving that person signature authority.

Prepared by: MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.19 12:41:09 -05'00' Date: _____

Signature-**Division Project Manager**

_____

Printed Name

Accepted by: _____ Date: _____

Signature- **Design/Engineer Professional** (if applicable)

_____

Printed Name/Title/Company Name

Accepted by: _____ Date: _____

Signature- **Contractor/Consultant/Vendor**

_____

Printed Name/Title/ Company Name

Approved by: _____ Date: _____

Signature-**Division Manager or Designee** ***(Optional)***

_____

Printed Name

Approved by: AhmadJay Digitally signed by AhmadJay Date: 2025.02.19 12:59:12 -05'00' Date: _____

Signature-**Division Director or Designee** ***(Optional)***

_____

Printed Name

Approved by: _____ Date: _____

Signature-**Division Administrator or Designee** ***(Optional)***

_____

Printed Name

Collier County

Procurement Services Change Order Form

Contract# 24-8292	**CO#** 3	**PO#** 4500236559	**Project #:** 90067

Project Name: 2024 Park Shore Renourishment

Contractor/Consultant Name: Earth Tech Enterprises, Inc.

FOR PROCURMENT USE ONLY

FY ____ CHO Request # ☐

Approved by: _____
Signature-Procurement Professional Signature/Date

Approved by: _____
Signature-Procurement Manager/Director ***(OPTIONAL)***

APPROVAL TYPE:

☐ **Administrative** ☐ **Administrative-BCC Report** ☐ **BCC Stand-Alone ES (BCC Approval Required)**

BCC APPROVAL

ATTEST:

Crystal K. Kinzel, Clerk of the Circuit Court
and Comptroller

By: _____

Dated: _____

(SEAL)

BOARD OF COUNTY COMMISSIONERS
COLLIER COUNTY, FLORIDA

By: _____

_____, Chairman

Date: _____

Agenda # _____

Approved as to Form and Legality:

_____
Deputy County Attorney

_____
Print Name

EARTH TECH
ENTERPRISES

6180 Federal Court
Ft. Myers, FL 33905
Phone 239-774-1223
Fax 239-774-1227

Proposal

Date: 2/21/2025

Submitted To: Collier County
Project Name: Parkshoer regrade

Schedule of Values

Item #	Descripton	Quantity	Measure	Price	Total
	Regreade truck ruts due to traveling over completed work	36	hr	$ 195.00	$ 7,000.00
	Sitework Total				

Transportation Management Services
WORK DIRECTIVE CHANGE

CONTRACT # /PROJECT NAME: 24-8292 Park Shore Renourishment **CHANGE # 2**

DATE OF ISSUANCE: February 19, 2025 **EFFECTIVE DATE: February 19, 2025**

OWNER: Collier County Board of Commissioners **PROJECT#: 90067**

CONTRACTOR: Earth Tech Enterprises, Inc. **ENGINEER/DESIGN**
PROFESSIONAL: APTIM Environmental and Infrastructure, LLC.

You are directed to proceed promptly with the following change(s):

Description:

- Return operations to beach at Sea House parcel approximately R-45+700 to fill per design template.
- Re-blade completed beach to remove ruts from hauling activities between Sea House and Horizon Way

Purpose of Work Directive Change: Complete design beach template at Sea House parcel previously skipped due to lack of executed right-of-access agreement.

If a claim is made that the above change(s) have affected Contract Price or Contract Times any claim for a Change Order based thereon will involve one or more of the following methods of determining the effect of the changes(s).

Method of determining change in Contract Price:
☐ Unit Prices
☐ Lump Sum
☒ Other lump sum for additional re-grading

Method of determining change in Contract Times:
☐ Contractor's records
☐ Engineer's record
☐ Other

Estimated **increase** in Contract Price
$ **7,000.00**

Estimated change in Contract Time:
Increase by 0 calendar days.

RECOMMENDED:

By: Nicole Sharp Digitally signed by Nicole Sharp Date: 2025.02.18 15:47:21 -05'00'
Engineer

AUTHORIZED:

By: MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.18 15:08:29 -05'00'
Owner's Representative

Lifecycle Analyses of Subaerial Beach Nourishments with Concurrent Nearshore Placement of Dredged Sediment and the Role of Alongshore Transport

Douglas R. Krafft[1]; Brian C. McFall, Ph.D., M.ASCE[2]; Jeffrey A. Melby, Ph.D., M.ASCE[3]; and Bradley D. Johnson, Ph.D.[4]

Abstract: Beach nourishment has a high cost but offers large economic benefits. Therefore, extending the nourishment lifespan using dredged sediment from navigation channels could have a significant economic impact. This numerical modeling study develops and compares two approaches incorporating nearshore sediment placements into an existing one-dimensional numerical modeling procedure to predict the lifespans of subaerial beach nourishment strategies. Both approaches build directly on the stochastic lifecycle simulation methodology and results used in the Coastal Texas Protection and Restoration Feasibility Study. Simulations for western Galveston Island were modified to include annually recurring nearshore nourishment. Cross-shore beach transects were forced with 50 years of tropical cyclones and nontropical storms in a cross-shore morphological evolution model, and rebuilt when the dune eroded to half of its initial height. One group of simulations applied this previously developed model forcing to cross-shore profiles that were updated with recurring nearshore nourishments. A second group of simulations included a simplified representation of sediment deposition from the alongshore transport gradient created by the nearshore nourishments. In both sets of simulations, a large sediment feature was incrementally constructed at depths between 2.5 and 6 m. Over 30 life cycles, the number of times the beach was rebuilt was tracked for each 50-year simulation. Comparing the number of predicted beach renourishments indicates that this particular nearshore nourishment strategy did not substantially impact the subaerial beach morphology unless alongshore transport gradients were also included. Simulations that did include this alongshore transport gradient predicted 23% longer lifespans. This work was not able to incorporate validation against measured data, but future testing of this approach should be pursued before widespread or high-impact application. Modeling results indicate that alongshore processes are an important part of quantifying the positive impacts of nearshore nourishment. **DOI: 10.1061/JWPED5.WWENG-2152**. *This work is made available under the terms of the Creative Commons Attribution 4.0 International license, https://creativecommons.org/licenses/by/4.0/.*

This work is made available under the terms of the Creative Commons Attribution 4.0 International license.

Introduction

Predicting coastal storm damages and resilience is increasingly important because the most destructive coastal storms can incur damages exceeding 100 billion USD (NOAA NCEI 2024). Highly destructive tropical cyclones have become increasingly frequent and more destructive over the last several decades (NOAA NCEI 2024). Climate change is predicted to increase extreme water levels due to tides, wave setup, and storm surge by a global average of 0.34–1.72 m by 2100 (Vousdoukas et al. 2018), and shoreline erosion faster than 0.5 m/year is already estimated to occur on 24% of sandy coastline globally (Luijendijk et al. 2018). Coastal erosion and storm risk are often mitigated by adding sediment to the subaerial beach (Hanson et al. 2002; Pan et al. 2017; Bitan and Zviely 2020; Elko et al. 2021; Brand et al. 2022). This typically costs tens of millions of dollars (Hoagland et al. 2012) but also has enormous economic benefits. Ecosystem services provided by beaches vary between locations, but 2022 updates to US-based ecosystem service values recommended $122,000/ha/year for benefit–cost analyses (FEMA 2022). The high cost and high values make possible beach nourishment lifespan optimizations necessary.

Lifespans of subaerial beach nourishments can be predicted with various procedures but are frequently simulated with one-dimensional (1D) numerical models that relate environmental forcing to subaerial beach morphology change. Many of these approaches have simulated the response of cross-shore profiles to environmental forcing in models such as Beach-fx (Gravens et al. 2007; Males et al. 2007; Moser et al. 2007; Rogers et al. 2009), CSHORE (Johnson et al. 2012), StormSim (Nadal-Caraballo et al. 2015; Melby et al. 2015, 2017), XBeach (Roelvink et al. 2009), or CS-Model (Larson et al. 2016). Long-term shoreline changes and beach nourishment lifespans are also predicted with 1D alongshore representations using one-line models that follow Pelnard-Considere (1956) such as GenCade (Frey et al. 2012) and the long-term configuration model (Coelho 2005; Coelho et al. 2007). It is possible to assess beach performance using two-dimensional (2D) horizontal models for a limited number of

[1]Research Civil Engineer, US Army Engineer Research and Development Center, 3909 Halls Ferry Rd., Vicksburg, MS 39180-6199 (corresponding author). ORCID: https://orcid.org/0000-0002-8922-6000. Email: Douglas.R.Krafft@usace.army.mil

[2]Research Civil Engineer, US Army Engineer Research and Development Center, 3909 Halls Ferry Rd., Vicksburg, MS 39180-6199. ORCID: https://orcid.org/0000-0001-9575-0012. Email: Brian.C.McFall@usace.army.mil

[3]Research Hydraulic Engineer, US Army Engineer Research and Development Center, 3909 Halls Ferry Rd., Vicksburg, MS 39180-6199. Email: Jeffrey.A.Melby@usace.army.mil

[4]Research Hydraulic Engineer, US Army Engineer Research and Development Center, 3909 Halls Ferry Rd., Vicksburg, MS 39180-6199. Email: Bradley.D.Johnson@usace.army.mil

Note. This manuscript was submitted on April 15, 2024; approved on August 14, 2024; published online on November 6, 2024. Discussion period open until April 6, 2025; separate discussions must be submitted for individual papers. This paper is part of the ***Journal of Waterway, Port, Coastal, and Ocean Engineering***, © ASCE, ISSN 0733-950X.

storms, but it is not presently feasible to run lifecycle analyses and achieve statistical convergence because of the prohibitively large computational cost, so 1D models are a common choice. In the US, federally funded Coastal Storm Damage Risk Management (CSRM) projects use 1D cross-shore models during the feasibility phase to quantify the life cycle and economic benefits of nourishment alternatives.

Many beach nourishment projects have navigation channels nearby, which require regular dredging. Depending on the characteristics of the dredged material, it can often be placed in the nearshore, which could alter nearshore wave conditions and lifespans of subaerial nourishments. In this context, the term nearshore describes the area between the swash zone and the depth of closure. Adding sediment to this region of the subaqueous beach profile allows natural forces to redistribute the material over the broader profile (Bain et al. 2021; McFall et al. 2021; Brand et al. 2022) and winnow fine sediment from the placed material (Wang et al. 2013; Brutsché et al. 2014). These placements are often referred to as shoreface or nearshore nourishments and are widely used (Zwamborn et al. 1970; Vera-Cruz 1972; Hanson et al. 2002; Palalane et al. 2016; Brutsché et al. 2019a; Young et al. 2020; Walker et al. 2022; Pinto et al. 2022; McGill et al. 2022). As an economic incentive, placing sediment on the nearshore is generally cheaper by volume than on the subaerial beach (Huisman et al. 2019; Brand et al. 2022). In the US, nearshore nourishments can frequently accommodate a wider range of sediment sizes and are therefore more likely to be able to use dredged sediment from navigation channels (Brutsché et al. 2019a; Walker et al. 2022), further reducing nourishment costs (Hoagland et al. 2012). Many nearshore nourishments are placed into concentrated footprints as sandbarlike features, sometimes referred to as nearshore berms and can dissipate particularly large waves farther offshore (Brutsché et al. 2017). Influences on local wave conditions can also alter the cross-shore distribution of alongshore sediment transport. Through a combination of processes, nearshore nourishments supply material to the littoral sediment system and beach profile and frequently increase the local volume of accretion on or near the subaerial beach (Zwamborn et al. 1970; Vera-Cruz 1972; Brutsché et al. 2014; Lodder and Sørensen 2016; Brutsché et al. 2017; Huisman et al. 2019; McGill et al. 2022) or decrease local erosion (Zwamborn et al. 1970; Otay 1994).

Nearshore nourishments are sometimes used for the potential to increase onshore accretion and reduce erosion (Vera-Cruz 1972; Otay 1994; Pan et al. 2017; McGill et al. 2022). The possibility of increasing beach nourishment lifespan by utilizing more frequent, lower-cost dredged sediment from nearby navigation channels as nearshore nourishments is of interest to the USACE and other agencies responsible for managing coastal storm risk (Krafft et al. 2020).

The goal of this study was to modify an existing 1D procedure for predicting subaerial beach nourishment lifespans to include the impact of placing sediment in the nearshore. This was evaluated both with and without a representation of alongshore gradients in the alongshore sediment transport. The example described here is intended to show a workflow to include the nearshore placement of sediment dredged from nearby navigation channels in predictions of beach nourishment lifespans for a typical CSRM planning project evaluation.

Methodology

This study compared beach nourishment lifespan predictions for one example with and without nearshore nourishment. Beach nourishment lifespans from three sets of simulations were considered:

1. without nearshore nourishment;
2. with nearshore nourishment but without any impact of net alongshore transport; and
3. with nearshore nourishment and including the associated gradient in alongshore transport

Beach Nourishment Lifespan Predictions

Beach nourishment lifespans are often predicted with 1D morphology models, which afford the computational efficiency to consider long timespans and lifecycle analyses, but both cross-shore and alongshore processes can have important influences on nearshore nourishments. In the alongshore, littoral drift can deposit sediment in the sheltered area landward of the placement as particularly large waves break over the placement locally but farther onshore on either side of it (van Duin et al. 2004). In the cross shore, waves that shoal without breaking at the nearshore nourishment generate wave asymmetry, which transports the placed sediment farther onshore (van Duin et al. 2004). Onshore transport of placed material has been suggested to be most substantial during calmer wave conditions with smaller Dean numbers (offshore wave height divided by the product of wave period and sediment fall velocity) (Larson and Kraus 1992; Larson et al. 2016). While this framework attributes offshore sediment transport to more energetic wave events with large Dean numbers, several flume studies have shown that the cross-shore impacts of nearshore nourishments can also limit dry beach erosion during storms (Zwamborn et al. 1970; Atkinson and Baldock 2020; Li et al. 2022). Two approaches are developed to demonstrate the relative importance of these different phenomena during storm conditions. The first only considers a single 1D cross-shore transect, and the second also applies a representation of alongshore transport gradients introduced by the nearshore nourishment.

Predicting Beach Nourishment Lifespan with StormSim LCS-Beach Simulations

This effort predicted beach nourishment lifespans with the same procedure as the Coastal Texas Protection and Restoration Feasibility Study from Melby et al. (2021), matching the initial single dune beach profile from the western 10.3 km of Galveston Island, Texas (Fig. 1), the hydrodynamic forcing conditions, and the numerical modeling parameters. This area was represented by a single cross-shore transect of elevation, which was forced with independently sampled synthetic tropical cyclones and historical nontropical storms in 50-year Monte Carlo lifecycle simulations. The stochastic simulation was implemented in software called StormSim LCS-Beach and generally followed a standardized Monte Carlo lifecycle approach. Storms were randomly sampled from predefined suites with an annual sampling context. The number of storms from a specific suite to be applied in a given year is defined from a random Poisson sample. Many random sequences (life cycles) of storms are created in a preprocessing step. Within each life cycle, each storm is represented as a time series of 1-h increments. Storm durations vary, and each storm is unique in its track, intensity, size, and speed. Characteristics during the storms vary similarly to real storm hyetographs, starting at low intensity, building to a peak, and then decaying. Storm wave and water level conditions are defined offshore as output from a high-fidelity coupled circulation and wave transformation model and represent the offshore forcing boundary condition for the 1D morphology model. Morphology change is predicted with the USACE 2014 version of CSHORE, updated February 8 2019. CSHORE simulations

This work is made available under the terms of the Creative Commons Attribution 4.0 International license.

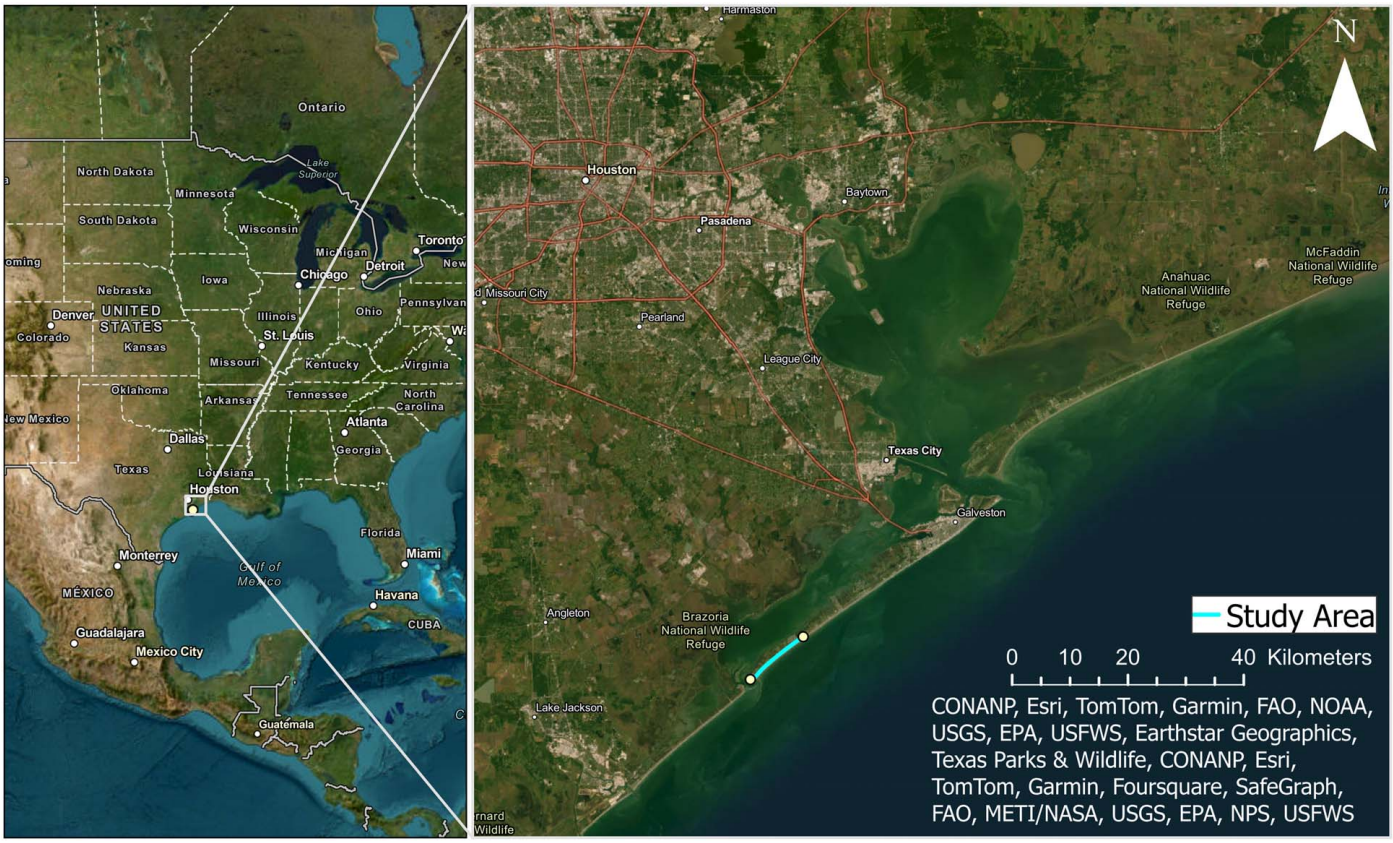


Fig. 1. Map of alongshore extent of data Melby et al. (2021) used to create the representative cross-shore transect for western Galveston Island, Texas, applied in this study. (Data from Melby et al. 2021; Base map © CONANP, Esri, TomTom, Garmin, FAO, NOAA, USGS, EPA, USFWS, Earthstar Geographics, Texas Parks & Wildlife, CONANP, Esri, TomTom, Garmin, Foursquare, SafeGraph, FAO, METI/NASA, USGS, EPA, NPS, USFWS.)

considered a cross-shore transect, initially specified with elevations for a beach and dune nourishment and present conditions in the nearshore to a depth of 8.5 m. The initial subaerial beach was defined using a 3-m-tall dune with a seaward toe elevation of 1.2 m, NAVD88, and a 32-m-wide berm with a crest elevation of 1 m, NAVD88 (Fig. 2). The life cycles progress with each storm time step simulated, and all storms in a life cycle are simulated in sequence, with the output from one storm becoming the input for the following.

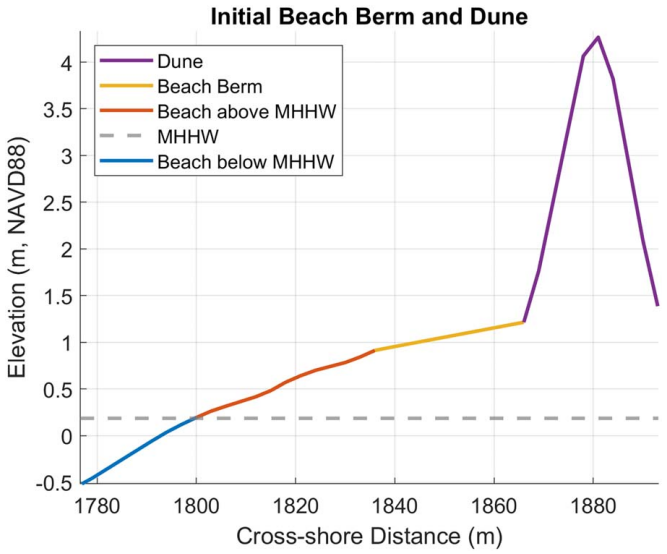


Fig. 2. Initial elevations specified for the dune and beach berm.

Wave and water level boundary conditions consisted of nontropical storms and tropical cyclones. Nontropical storms were sampled from the 35 most extreme historical events selected with a peaks-over-threshold analysis of water level data from National Oceanic and Atmospheric Administration (NOAA) water level station 8771450 at Galveston Pier 21 in which tropical storms defined in the NOAA, National Hurricane Center HURDAT2 (HURricane DATa 2nd generation), database were excluded. Wave data during selected nontropical events were determined from wave information study station 73067. The tropical cyclone storm suite was generated using a joint probability analysis of tropical cyclone meteorological parameters to produce 660 regional synthetic storms as part of the Coastal Texas Protection and Restoration Feasibility Study (Melby et al. 2021). The climatological parameters were central pressure deficit, radius to maximum wind, forward speed, heading, and landfall location. Synthetic tropical storms were defined from a probabilistic coastal hazard analysis by constructing a joint probability model of historical storm parameters from the HURDAT II database. The parameters were optimally sampled to construct a suite of storms that represents the flood hazards and storm wind and pressure fields created. The basinwide and local tropical storm hydrodynamic response was modeled at high fidelity using CSTORM (Massey et al. 2011), coupling ADCIRC (Luettich et al. 1992; Westerink et al. 1994; Luettich and Westerink 2004), and STWAVE (Smith et al. 2001). This suite of tropical cyclones was optimally subsampled using a genetic algorithm optimization of the local stormwater level (SWL) hazard curve to yield

This work is made available under the terms of the Creative Commons Attribution 4.0 International license.

170 storms that accurately mapped the response probability space. Poisson distributions for both nontropical storms and tropical cyclones were developed to define the annual sampling rate for each statistical family. A single distribution represented historical nontropical frequencies. However, three tropical cyclone intensity levels were defined and associated with separate Poisson distributions. These distributions were randomly sampled for an average of 46 nontropical storms and 30 tropical cyclones in each 50-year lifecycle simulation (Melby et al. 2021). Tropical storms were sampled from a basinwide suite of simulations, so forcing conditions at the site vary substantially. Some events include particularly high water levels and large waves, but many of the 30 tropical cyclones in a typical simulation produce very little response at the site. Random tidal time series and relative sea level change (RSLC) from a modified version of National Research Council Curve III (also referred to as USACE High) were linearly added to stormwater levels each year. RSLC matched the High RSLC cases presented by Melby et al. (2021). Using this method, storm wave and water level boundary conditions were generated consisting of parameters SWL, significant wave height (H_{m0}), peak wave period (T_p), and mean wave direction with a directional energy density spectrum at each storm time step. These spectral conditions were applied as an offshore boundary condition in a depth of approximately 8.5 m for the embedded CSHORE model to predict morphology change over each life cycle. The bathymetric and topographic conditions at the end of each time step were used as input to the following storm. The applied CSHORE sediment transport and general parameters are listed in Table 1. For the selected 30 life cycles of 50 years of storm forcing, the average RMS wave height (H_{rms}) was 1.3 m and incident wave angles were generally between −20° and 60° from shore normal with an energy-weighted mean wave direction of 20° (Fig. 3).

The cross-shore profile was reset to the original representative profile if the dune reached half of the initial height, representing a prescribed anthropogenic beach renourishment and dune rebuilding after storm damage. The entire elevation profile was reset to the initial conditions in each rebuild to represent beach-fill construction motivated by degraded conditions. The frequency at which these rebuilds occur is an important metric for assessing and comparing coastal protection and resiliency. Thirty lifecycle simulations were run to achieve statistically stable results. These elements of the methodology were essentially unaltered by Melby et al. (2021).

This approach allows for computationally efficient evaluations of long timespans of statistically representative storms but omits several relevant phenomena. Because forcing was only applied during storms, the longer timespans of less energetic conditions were not included. A variety of findings (Larson and Kraus 1992; Elgar et al. 2001; Larson et al. 2016) indicate that nonstorm conditions

Table 1. Selected values for CSHORE parameters

Description	Value
Median grain size diameter	0.15 mm
Fall velocity	0.0165 m/s
Specific gravity	2.65
Suspension efficiency due to breaking	0.005
Suspension efficiency due to bottom friction	0.01
Suspended load parameter	0.2
Suspended load parameter associated with overtopping	0.1
Limiting maximum slope	0.63
Bed load parameter	0.001
Computational cell size	3 m
Empirical breaker ratio parameter	0.7
Run-up wire height	0.02 m

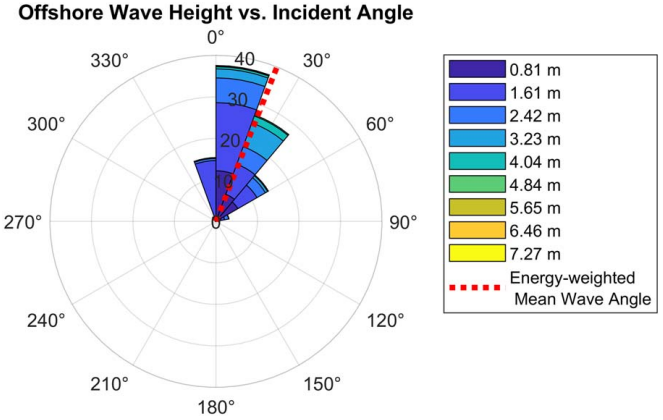


Fig. 3. RMS wave heights (H_{rms}) and incident wave angle of the forcing information applied over the 30 selected 50-year lifecycle simulations.

are important to accurately describe the onshore transport of the material placed in the nearshore, so a variety of accretionary processes may be omitted. This numerical modeling also omits infragravity waves that can influence beach face and dune erosion and breaching during storms (Roelvink et al. 2009; McCall et al. 2010) and specifically wave conditions during an overwash event (Anarde et al. 2020). Additionally, sediment transport directions in this area can have seasonal and spatial variability (Alrushaid 2018), which results from processes that this modeling did not include. Morphology change predictions were not validated against measured data in this study, but prior CSHORE modeling successfully modeled the morphology change at the nearby Follet's Island, Texas, during Hurricane Ike (Harter and Figlus 2017). CSHORE results of Harter and Figlus (2017) closely matched poststorm beach slope and shoreline observations, but errors were larger along the foredune. More detailed numerical modeling that is able to include these factors would be likely to achieve more accurate results but would struggle to represent storm-driven morphology change for a statistically stable number of 50-year life cycles in typical CSRM planning evaluations.

Representing Nearshore Nourishments in StormSim LCS-Beach

Sediment was added to the simulation profiles annually to represent recurring nearshore nourishments that follow a typical dredging cycle. Nearshore nourishment characteristics were selected to be reasonable for the study area and large enough to impact waves. The nourishment berm had a cross-sectional area of 76.1 m^3/m of shoreline, corresponding to a volume of 38,000 m^3 over a length of 500 m. Placement depth was determined using the known capabilities of the USACE split-hull hopper dredges Murden and Currituck, and the volume was estimated using the common dredging volumes from channels on the south of Galveston Island. The placement depth and volume are similar to the nearshore nourishment plans for the Matagorda Ship Channel, which uses a cutter-suction dredge in the channel and places sediment in 2.5–6 m depths (Walker et al. 2022). The geometry of the nearshore berm was specified by the upper edge of the combination of the initial profile (z_p) and a Gaussian curve (z_g), following the equations

$$z_g(x) = \alpha \cdot e^{(-(x-\mu)^2/2\sigma^2)} + z_{\text{offset}} \quad (1)$$

$$\alpha = hb_0 + \beta_0 \quad (2)$$

This work is made available under the terms of the Creative Commons Attribution 4.0 International license.

$$\sigma = \frac{\alpha}{r} \tag{3}$$

$$z_{\text{offset}} = z_{nn} - \beta_0 \tag{4}$$

$$z_c(x) = \begin{Bmatrix} z_g(x), & \text{for } x_1 \langle x \rangle x_2 \\ z_p(x), & \text{for } x \langle x_1 \vee x \rangle x_2 \end{Bmatrix} \tag{5}$$

where z_c = elevation with the nearshore berm; x = cross-shore distance; x_1 and x_2 = x-coordinates of the intersection points of $z_g(x)$ and $z_p(x)$; $\mu = x$ position of the placement crest; hb_0 = placement crest height above $z_p(x)$; r = shape parameter; β_0 = additional distance between the crest height and the vertical reference for the curve; and z_{nn} = preplacement profile elevation at the berm crest (Fig. 4). Distance β_0 will be positive, and elevation z_{nn} will be negative (following the sign convention for elevation), making z_{offset} negative as well. The area formed by the intersection between this curve and the preplacement profile is defined as the nearshore nourishment. The shape parameter r was empirically determined to be 0.049 according to the Johnson et al. (2021) best fit of data from the 2009 Fort Myers Beach, Florida, nearshore nourishment described in Brutsché et al. (2014).

An iterative approach was developed to vary hb_0, μ, and β_0 until a solution was found that had no elevations above a specified limit and formed a closed shape with a cross-sectional area of 76 m^2. For each combination of hb_0 and μ, the reference elevation β_0 is lowered until a closed shape is formed between the elevation profile and the added Gaussian mound. Berm height (hb_0) and cross-shore position (μ) are varied iteratively until both conditions are satisfied. If the resulting berm is too small, it is moved offshore and made taller (by increasing hb_0). Similarly, if the resulting berm is too large, it is moved onshore and made shorter (by decreasing hb_0). This continues until a closed shape is formed that has a cross-sectional area within 0.93 m^2 of the specification. The mounds were initially centered over a preplacement depth of 2.44 m and could have a maximum crest depth of 1.22 m. Parameters hb_0, μ, and β_0 were determined for each subsequent annual placement added to the profile, with the mound expanding in the seaward direction with each subsequent placement (Fig. 5).

Alongshore Sediment Transport Representation

Many nearshore nourishments are likely to introduce an alongshore sediment transport gradient. Breaking wave dissipation farther offshore reduces energy onshore of the feature (van Duin et al. 2004).

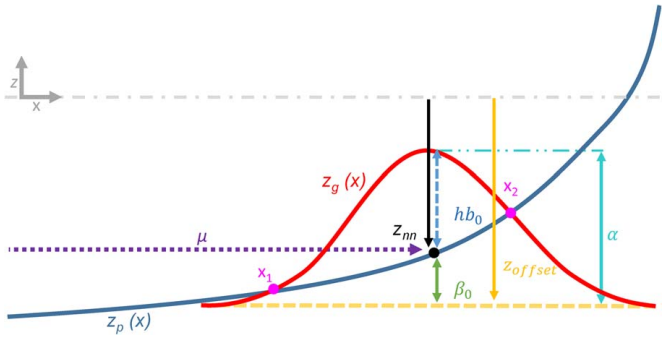


Fig. 4. Conceptual representation of spatial parameters used to add a nearshore nourishment to an elevation profile. This shape is formed from the intersection of the preplacement profile $z_p(x)$ and a Gaussian mound $z_g(x)$ defined by α, μ, r, and z_{offset} in Eqs. (1)–(3). The resulting profile is specified by $z_g(x)$ from x_1 to x_2 and $z_p(x)$ elsewhere.

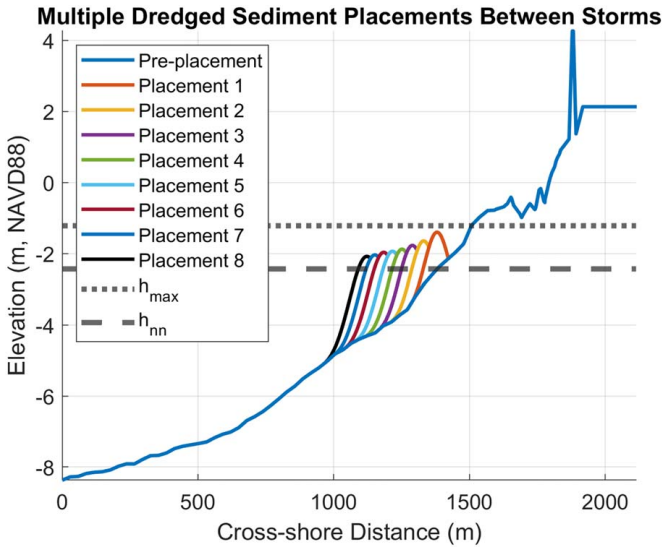


Fig. 5. Example of eight annual placements of dredged sediment without a simulated storm. Placements target a center at the x-coordinate where the profile is h_{nn} with a crest height below h_{max}.

The smaller waves have lower alongshore transport potential, resulting in an alongshore transport gradient that can trap sediment transported from the updrift of the nearshore nourishment. As an example, 3-year observations indicated that the accretion landward of the 1993 nearshore nourishment between the middle and outer bars at Terschelling, in the Netherlands, was approximately 150% larger than the erosion from the placed sediment footprint (Grunnet and Ruessink 2005). Similarly, the accretion around the 2021 nearshore nourishment at Harvey Cedars, New Jersey, was 145% greater than the material eroded from the nearshore placement footprint (McGill et al. 2022). These instances where observed accretion exceeds observed erosion by a wide margin may indicate temporary longshore trapping. Similarly, tracer data from the USACE Large-Scale Transport Facility indicated a predominantly alongshore transport direction from the placement (Smith et al. 2017). In these examples, changes to alongshore sediment transport patterns appear to have a strong influence on morphology change in the vicinity of nearshore nourishments.

A variety of studies have incorporated alongshore transport gradients into 1D cross-shore simulations (Hoekstra et al. 1996; Kobayashi and Jung 2012; Barnard et al. 2014; Coelho et al. 2020), and a similar approach was used in this study. The impact of alongshore transport for a series of 1D model transects was investigated for this example with a 1.5-dimensional (1.5D) approach. The additional accounting adds an idealized representation of an alongshore transport gradient caused by the nearshore nourishment. The alongshore transport gradient is estimated by comparing the cross-shore distribution of alongshore sediment transport at each timestep $[q_{y1}(x)]$ to the analogous calculation for the initial profile without any nearshore nourishment $[q_{y0}(x)]$. Cross-shore varying alongshore transport differences were tracked over each CSHORE simulation to determine the change in elevation $[dz(x)]$ to add to each point on the elevation profile after each storm. Alongshore sediment transport rates are calculated in m^2/s, so this is converted to vertical accretion or erosion in meters by multiplying transport rates by the timestep (dt) and dividing by the alongshore length (L) of the nearshore nourishment to represent material spreading evenly over this entire length. Elevation gains

This work is made available under the terms of the Creative Commons Attribution 4.0 International license.

and losses [$dz(x)$] in each cell can then be described by the equation:

$$dz(x) = \frac{[|q_{y0}(x)| - |q_{y1}(x)|]}{L \cdot p} \cdot dt \quad (6)$$

where p = porosity of the deposited sand. In this case, p is 0.6 and L is 500 m. Sand was added to model cells where the nearshore nourishment led to reduced alongshore sediment transport [$|q_{y0}(x)| > |q_{y1}(x)|$], representing temporary trapping of sediment from updrift beaches. Similarly, sand was removed from model cells where the nearshore nourishment caused an increase in alongshore sediment transport [$|q_{y0}(x)| < |q_{y1}(x)|$]. In this simplified approach, changes to the updrift and downdrift elevation profiles are not tracked. This conceptual model of sediment trapping is most valid in cases where alongshore current variability is most strongly influenced by oblique waves, providing a quantitative estimate of processes that are expected to occur in many cases without substantially increasing the complexity of the 1D model. Impacts of this assumed 1.5D framework are discussed for beach nourishment lifespan predictions, but additional validation should be pursued.

Results

Beach Nourishment Lifespan Estimates with the 1D Approach

Simulated morphology was used to predict beach nourishment frequency by tracking the dune crest elevation. The entire profile was reset to the initial profile when the dune height was reduced to 50% of the initial height (Fig. 6). The frequency at which the profile was reset is interpreted as the simulation timespan divided by the beach nourishment lifespan. Simulations predicted beach nourishment lifespans of 9.4 years for both the case without nearshore nourishment and the 1D case that included nearshore nourishment (Table 2). Annual nearshore nourishment created a large barlike feature at depths between 2.5 and 6 m, but this did not significantly influence the subaerial beach morphology. Beach elevations were tracked at several points between the dune and mean higher high water (MHHW); however, likewise, the simulated nearshore nourishment did not have any appreciable impacts on these elevations.

The inability to alter 1D morphology change predictions at the subaerial beach with sediment placement in the nearshore may result from several numerical modeling simplifications. The onshore transport of sediment expected during nonstorm events is not included, which could limit the impact the placed sediment feature has on shallower areas before water levels and wave heights increase during storms. The added nearshore nourishments are predicted to dissipate energy immediately onshore of the berm crest for intense storms, but wave energy at points closer to the shoreline was never impacted (Fig. 7). Measurements of wave transmission across shallow nearshore nourishments are scarce, so the veracity of this prediction is difficult to assess. The flume experiments of Zwamborn et al. (1970) and Li et al. (2022) appear to attribute reduced subaerial beach erosion at least partially to wave-energy dissipation at nearshore nourishments, and Brutsché et al. (2019b) also

Table 2. Number of beach rebuilds per 50-year simulations

Case	Mean	Standard deviation	Mean + standard deviation
1D no nourishment	5.3	1.3	6.6
1D nearshore nourishment	5.3	1.4	6.7
1.5D nearshore nourishment	4.3	1.4	5.7

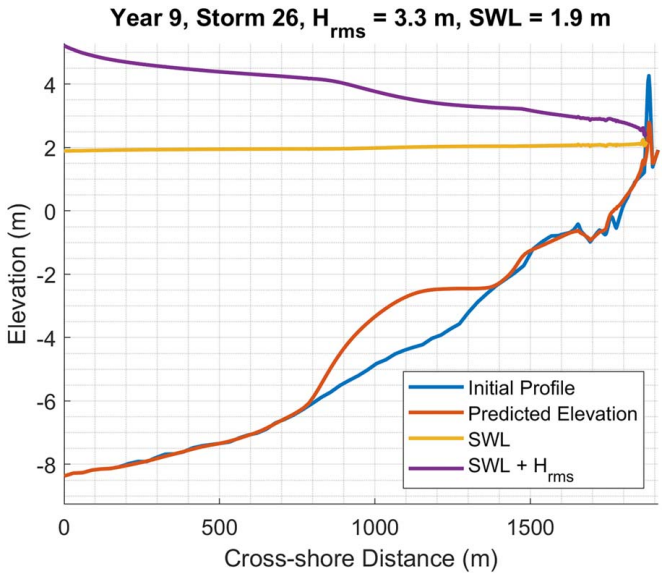


Fig. 6. Example of profile morphology after the 26th storm [with SWL and the sum of stormwater level and RMS wave height (SWL + H_{rms})], with 678 m^3/m added to the nearshore over 9 years at a nominal depth of 2.44 m. Dune erosion has exceeded the limit (50% reduction), and the beach will be rebuilt before the next storm.

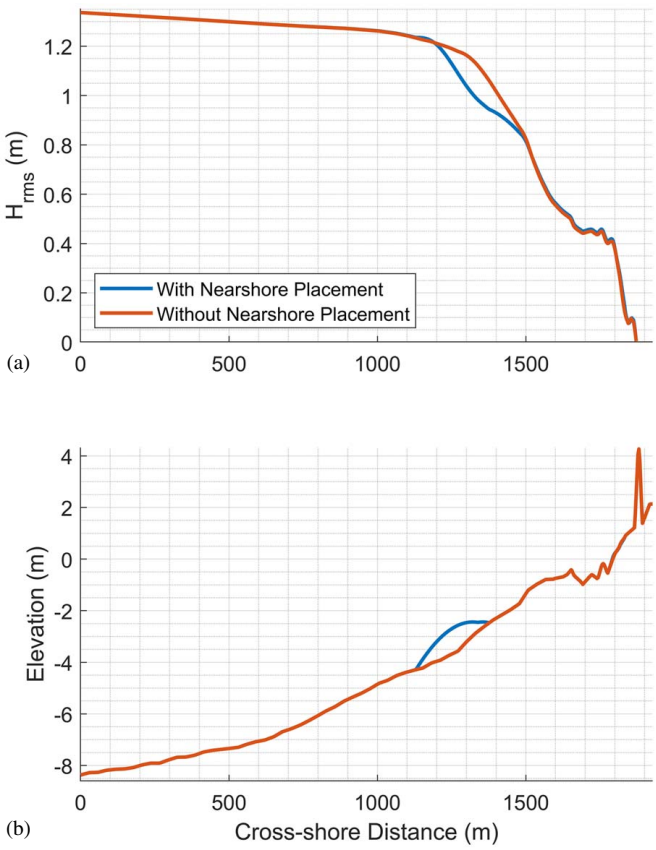


Fig. 7. Example of nearshore placement impacts on (a) RMS wave height (H_{rms}); and (b) elevation.

This work is made available under the terms of the Creative Commons Attribution 4.0 International license.

observed waves breaking over dredged sediment placed in the nearshore, but it is unclear if the case modeled here is similar enough to expect similar results. The lack of site-specific validation makes separating the influences of multiple factors that may contribute difficult.

Results may also be influenced by the limitations of the selected numerical modeling approach and the specifics of the selected example. The offshore in the area of Galveston Island includes a very wide shallow shelf, so surfzone saturation occurs over a very broad area. The simple CSHORE breaking model and lack of infragravity waves may explain the nearshore nourishment's lack of impact on dry beach morphology in the modeled 1D results. Much of the Gulf of Mexico coastline is characterized by a wide shelf and extreme but infrequent tropical cyclones. Findings of studies in similar sections of the Texas coast indicate that during these infrequent extreme tropical cyclones, infragravity waves may have a strong influence on hydrodynamic forces near the toe of the dune (Anarde et al. 2020). Simulations in Cox (2011) observed a strong reduction in infragravity swash energy onshore of sandbars during larger storm events, which highlights the potential erosion reduction benefits on the lee side of nearshore nourishments. More detailed future studies should investigate this potential infragravity energy reduction. The relatively mild, frequent nontropical storms produce little morphology change, but the infrequent tropical cyclones with storm surges over 5 m can destroy the dune regardless of anthropogenic nourishment activity. This characteristic hazard likely plays a role in limiting the berm influence in 1D morphology modeling.

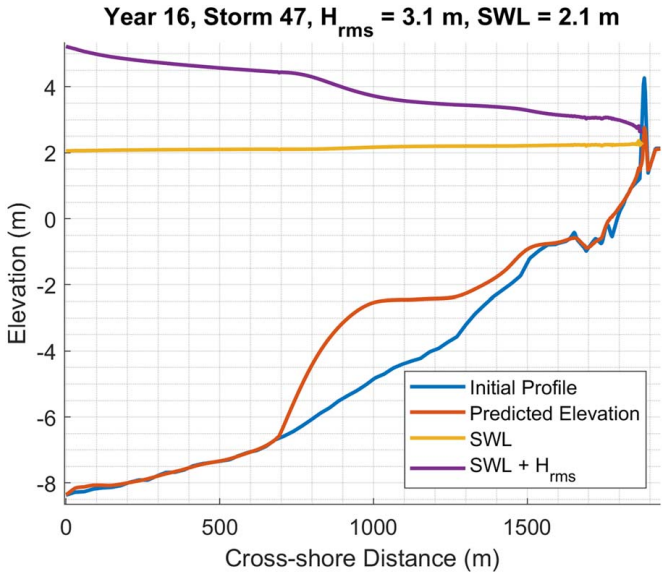


Fig. 8. Example of profile morphology after the 47th storm [with SWL and the sum of stormwater level and RMS wave height (SWL + H_{rms})] in the high RSLC scenario, with 1,211 m^3/m added to the nearshore over 16 years at a nominal depth of 2.44 m. Dune erosion has exceeded the limit (50% reduction), and the beach will be rebuilt before the next storm.

Beach Nourishment Lifespan Estimates with the 1.5D Approach

Applying the 1.5D approximation results in increased erosion at the nearshore berm, as waves break farther offshore, and creates an associated accretion in the sheltered area onshore of the nearshore berm, as alongshore transport is reduced. These simulations also construct a large sediment feature between depths of 2.5 and 6 m, but larger amounts of accretion occur landward of the placed sediment. The largest quantities of sediment that the 1.5D approach adds and removes are in the 500 m landward of the nearshore nourishment crest and on the seaward edge of the nearshore nourishment (Fig. 6 versus Fig. 8). In this case, these volumes of sediment that the 1.5D approach accretes and erodes are approximately equal, but the process results in a net onshore shift. The average beach nourishment lifespan increased to 11.6 years in the 1.5D simulations, indicating that the alongshore transport gradient could increase the mean beach lifespan by as much as 23% in this example (Table 2).

Discussion

Simulations in StormSim that only account for cross-shore transport predicted very minimal impacts near the subaerial beach from the large quantity of sediment added to the nearshore at depths between 2.5 and 6 m. At various points in the simulations, nearshore nourishment created a substantial step that covered large portions of the domain. They greatly increased the surf zone width during some wave conditions and dissipated more energy farther offshore in others. This did not, however, produce an appreciable difference in forcing or morphology within the subaerial beach unless the 1.5D approach added in the gradient in alongshore transport. A brief discussion of these results is warranted.

Shoreline Accretion and Nearshore Nourishments

Most observations of nearshore nourishments include at least some accretion onshore of the initial placement footprint (Ahrens and Hands 1999; Brutsché et al. 2019a; Brand et al. 2022). Sediment transport directions are never directly measured at nearshore nourishments, so transport is inferred from feature migration and morphology change. Observations following the beneficial use of dredged sediment in nearshore berms have indicated subaerial beach width gains of 4 and 10 m in the lee of the two nearshore berms at Vilano Beach, Florida (Brutsché et al. 2017; McFall et al. 2017), an average of 13 m at the 2009 nearshore berm at Ft. Myers Beach, Florida (Brutsché et al. 2014), and up to 10.9 m at the nearshore berm at Harvey Cedars, New Jersey (McGill et al. 2022). These placements were all active, dispersing a substantial amount of the placed material within the measurement duration. The shoreline change patterns at Vilano Beach were observed to be similar to salient formation in the lee of submerged breakwaters (Brutsché et al. 2017), and accretion was 145% larger than the volume of sediment removed from the placement area at Harvey Cedars (McGill et al. 2022). On a larger scale, shoreline accretion was also observed at the 2 million m^3 nearshore nourishment at Terschelling in the Netherlands. This sediment was added between the middle and outer bar in 1993 and corresponded with a shift from 3 m/year shoreline retreat to 15 m/year shoreline advance (Grunnet and Ruessink 2005). After 3–4 years, the area onshore of the nearshore nourishment gained 150% more sediment than eroded from the placement, indicating a substantial quantity of alongshore transport was temporarily trapped (Grunnet and Ruessink 2005). The review of many Dutch nearshore nourishments by Brand et al. (2022) found the amount of shallow nearshore and subaerial beach accretion after 1 year to be 20%–30% of the volume of placed material. Huisman et al. (2019) suggested that this deposited material was transported shoreward from the trough immediately landward of the placement in many of these examples.

This work is made available under the terms of the Creative Commons Attribution 4.0 International license.

These field examples, and many others, match the expectation that dynamic nearshore nourishments will contribute to shoreline accretion, as described in van Duin et al. (2004), but relatively deep and stable nearshore berms can also stabilize shorelines. In one example, a nearshore berm was constructed in 1991 with 3 million m^3 of dredged sediment in 5–6.5 m depths fronting a subaerial beach nourishment constructed 2 years previously at Perdido Key, Florida (Otay 1995). The nearshore nourishment was stable and was constructed deeper than the calculated Hallermeier outer depth of closure (McFall et al. 2021). The berm did provide shoreline protection, with the results of a 5-year monitoring period indicating that the shoreline on the lee side of the berm receded 35 m compared to 60 m outside of the sheltered area (Otay 1994). The combination of these observed shoreline responses to nearshore nourishments and the inability to impact the dry beach in the tested 1D cross-shore simulations indicate that alongshore transport impoundment could be an important process influencing the observed morphology changes. Reduced alongshore transport behind detached breakwaters can often contribute to localized shoreline accretion, potentially forming salients or tombolos. The shoreline response in the lee of a nearshore nourishment can show similar attributes.

Beach Nourishment Lifespan Estimates with the 1.5D Approach

The increase in modeled beach lifespan using the 1.5D approach indicates that alongshore transport gradients may significantly influence the morphology response for beaches with nearshore nourishment. The prediction of extended beach nourishment lifespans from the alongshore transport gradients caused by nearshore nourishments is qualitatively confirmed by historical observations. Approaches similar to this 1.5D model may be able to combine some representation of alongshore transport gradients with the large number of judiciously selected simulations in StormSim and the cross-shore processes of CSHORE to model the behavior of recurring nearshore nourishments and yield reasonable results. Expanding the simulated conditions to include calmer events that also mobilize sediment was beyond the scope of this effort but may be useful to consider in future work.

Conclusions

This study adds hypothetical nearshore nourishments to the beach nourishment lifespan predictions of Melby et al. (2021). Simulations of representative storm impacts on the dune system on the western section of Galveston Island, Texas, are compared with and without additional nearshore nourishments. Additionally, the impacts of a simplified representation of the alongshore transport gradient caused by the nearshore nourishments are investigated. These simulations evaluate the impact of adding sediment at depths between 2.5 and 6 m on dune erosion during storms. This barlike feature does not impact beach lifespan predictions unless alongshore transport gradients are also included. Although predicted lifespans in the 1D cases are insensitive to nearshore nourishment, the 1.5D cases have 23% longer beach nourishment lifespans. These results have several implications that may be important to future efforts that simulate or interpret morphology changes around nearshore nourishments. Key findings from this study are as follows:

1. Depth-limited breaking for saturated waves limits the energy that is predicted to reach the subaerial beach and dune, and this is not significantly influenced by deeper bathymetry changes in this approach.
2. Alongshore transport plays a significant role in nearshore nourishment morphodynamics, which suggests that 2D simulations would better address nearshore nourishment impacts than 1D simulations. The increased beach lifespans in the 1.5D simulations, which included a simplistic representation of an alongshore transport gradient, suggest that the sediment transport patterns related to wave sheltering zones may fundamentally be a 2D process.
3. The 1.5D simulation approach outlined here may be useful for quantifying nearshore sediment transport when fully 2D methods are not feasible, but it requires validation.
4. If successful, this 1.5D technique could enhance some applications that are generally 1D, such as CSRM feasibility studies.
5. The positive impacts of many nearshore nourishments may be better described by the cumulative effect of smaller wave events than the responses to the smaller number of very energetic wave events. Future studies should investigate this.

Data Availability Statement

Data, models, or codes that support the findings of this study are available from the corresponding author upon reasonable request.

Acknowledgments

This work was funded by the USACE through the Inlet Geomorphology Evolution Work Unit of the Coastal Inlets Research Program (CIRP). Work conducted by Melby et al. (2021) is directly applied, and this study benefits greatly from the contributions of that team. The synthetic tropical storm suite implemented in the simulations described in this work was originally developed for the work that Norberto Nadal-Caraballo, Amanda Lewis, Victor Gonzalez, Thomas C. Massey, and Andrew Cox describe in the unpublished report "Coastal Texas Protection and Restoration Feasibility Study, Probabilistic Modeling of Coastal Storm Hazards," and the current study benefits greatly from this contribution.

References

Ahrens, J. P., and E. B. Hands. 1999. "Parameterizing beach erosion/accretion conditions." *Coastal Eng.* 1998: 2382–2394. https://doi.org/10.1061/9780784404119.179.

Alrushaid, T. I. 2018. "Wind-driven nearshore dynamics in the Gulf of Mexico." Ph.D. thesis, Oceanography, Texas A&M Univ.

Anarde, K., J. Figlus, D. Sous, and M. Tissier. 2020. "Transformation of infragravity waves during hurricane overwash." *J. Mar. Sci. Eng.* 8 (8): 545. https://doi.org/10.3390/jmse8080545.

Atkinson, A. L., and T. E. Baldock. 2020. "Laboratory investigation of nourishment options to mitigate sea level rise induced erosion." *Coastal Eng.* 161: 103769. https://doi.org/10.1016/j.coastaleng.2020.103769.

Bain, R., B. C. McFall, D. R. Krafft and A. Hudson. 2021. "Evaluating transport formulations for application to nearshore berms." *J. Waterw. Port Coastal Ocean Eng*. 147 (6): 04021031. https://doi.org/10.1061/(ASCE)WW.1943-5460.0000668.

Barnard, P. L., M. van Ormondt, L. H. Erikson, J. Eshleman, C. Hapke, P. Ruggiero, P. N. Adams, and C. Foxgrover. 2014. "Development of the Coastal Storm Modeling System (CoSMoS) for predicting the impact of storms on high-energy, active-margin coasts." *Nat. Hazard.* 74: 1095–1125. https://doi.org/10.1007/s11069-014-1236-y.

Bitan, M., and D. Zviely. 2020. "Sand beach nourishment: Experience from the Mediterranean coast of Israel." *J. Mar. Sci. Eng.* 8 (4): 273. https://doi.org/10.3390/jmse8040273.

This work is made available under the terms of the Creative Commons Attribution 4.0 International license.

Brand, E., G. Ramaekers, and Q. Lodder. 2022. “Dutch experience with sand nourishments for dynamic coastline conservation—An operational overview.” *Ocean Coastal Manage.* 217: 106008. https://doi.org/10.1016/j.ocecoaman.2021.106008.

Brutsché, K. E., B. C. McFall, D. B. Bryant, and P. Wang. 2019a. *Literature review of nearshore berms*. Technical Rep. No. ERDC/CHL SR-19-2. Vicksburg, MS: USACE.

Brutsché, K. E., B. C. McFall, H. Li, J. E. McNinch, J. D. Ousley, J. A. Engle, and C. K. Maglio. 2017. “Strategic nearshore placement of dredged sediment at Vilano Beach, Florida.” *Shore Beach* 85 (3): 77–84.

Brutsché, K. E., B. C. McFall, H. Li, J. E. McNinch, J. D. Ousley, J. A. Engle, and C. K. Maglio. 2019b. “Strategic placement of dredged material in Vilano Beach, Florida, USA.” In *Proc., 9th Int. Conf. on Coastal Sediments 2019*, 2793–2804. Singapore: World Scientific.

Brutsché, K. E., P. Wang, T. M. Beck, J. D. Rosati, and K. R. Legault. 2014. “Morphological evolution of a submerged artificial nearshore berm along a low-wave microtidal coast, Fort Myers Beach, west-central Florida, USA.” *Coastal Eng.* 91: 29–44. https://doi.org/10.1016/j.coastaleng.2014.04.010.

Coelho, C. 2005. “Riscos de exposição de frentes urbanas para diferentes intervenções de defesa costeira.” [In Portuguese.] Ph.D. thesis, Eng. Civil, Univ. de Aveiro.

Coelho, C., M. Ferreira, and B. Marinho. 2020. “Numerical modelling of artificial sediment nourishment impacts.” *J. Coastal Res.* 95 (SI): 209–213. https://doi.org/10.2112/SI95-041.1.

Coelho, C., F. Veloso-Gomes, and R. Silva. 2007. “Shoreline coastal evolution model: Two Portuguese case studies.” In Vol. 5 of *Proc., 30th Int. Conf. on Coastal Engineering 2006*, edited by J. M. Smith, 3430–3441. Singapore: World Scientific.

Cox, N. C. 2011. “The influence of nearshore bars on infragravity energy at the shoreline.” Master’s thesis, Dept. of Civil Engineering, Texas A&M Univ.

Elgar, S., E. L. Gallagher, and R. T. Guza. 2001. “Nearshore sandbar migration.” *J. Geophys. Res.: Oceans* 106 (C6): 11623–11627. https://doi.org/10.1029/2000JC000389.

Elko, N., T. R. Briggs, L. Benedet, Q. Robertson, G. Thomson, B. M. Webb, and K. Garvey. 2021. “A century of US beach nourishment.” *Ocean Coastal Manage.* 199: 105406. https://doi.org/10.1016/j.ocecoaman.2020.105406.

FEMA. 2022. “FEMA ecosystem service value updates.” Accessed June 14, 2024. https://www.fema.gov/sites/default/files/documents/fema_ecosystem-service-value-updates_2022.pdf.

Frey, A. E., K. J. Connell, H. Hanson, M. Larson, R. C. Thomas, S. Munger, and A. Zundel. 2012. *Gencade version 1 model theory and user’s guide*. ERDC/CHL TR-12-25. Vicksburg, MS: US Army Engineer Research and Development Center.

Gravens, M. B., R. M. Males, and D. A. Moser. 2007. “Beach-fx: Monte Carlo life-cycle simulation model for estimating shore protection project evolution and cost benefit analyses.” *Shore Beach* 75 (1): 12–19.

Grunnet, N. M., and B. G. Ruessink. 2005. “Morphodynamic response of nearshore bars to a shoreface nourishment.” *Coastal Eng.* 52 (2): 119–137. https://doi.org/10.1016/j.coastaleng.2004.09.006.

Hanson, H., A. Brampton, M. Capobianco, H. H. Dette, L. Hamm, C. Laustrup, A. Lechuga, and R. Spanhoff. 2002. “Beach nourishment projects, practices, and objectives—A European overview.” *Coastal Eng.* 47 (2): 81–111. https://doi.org/10.1016/S0378-3839(02)00122-9.

Harter, C., and J. Figlus. 2017. “Numerical modeling of the morphodynamic response of a low-lying barrier island beach and foredune system inundated during Hurricane Ike using XBeach and CSHORE.” *Coastal Eng.* 120: 64–74. https://doi.org/10.1016/j.coastaleng.2016.11.005.

Hoagland, P., D. Jin, and H. L. Kite-Powell. 2012. “The costs of beach replenishment along the US Atlantic Coast.” *J. Coastal Res.* 28 (1A): 199–204. https://doi.org/10.2112/JCOASTRES-D-11-00066.1.

Hoekstra, P., K. T. Houwman, A. Kroon, B. G. Ruessink, J. A. Roelvink, and R. Spanhoff. 1996. “Morphological development of the Terschelling shoreface nourishment in response to hydrodynamic and sediment transport processes.” In *Proc., 25th Int. Conf. on Coastal Engineering 1996*, edited by B. L. Edge, 2897–2910. Reston, VA: ASCE.

Huisman, B. J., D. J. R. Walstra, M. Radermacher, M. A. de Schipper, and B. G. Ruessink. 2019. “Observations and modelling of shoreface nourishment behaviour.” *J. Mar. Sci. Eng.* 7 (3): 59. https://doi.org/10.3390/jmse7030059.

Johnson, B. D., N. Kobayashi, and M. B. Gravens. 2012. *Cross-shore numerical model CSHORE for waves, currents, sediment transport and beach profile evolution*. ERDC/CHL TR-12-22. Vicksburg, MS: US Army Engineer Research and Development Center.

Johnson, C. L., B. C. McFall, D. R. Krafft, and M. E. Brown. 2021. “Sediment transport and morphological response to nearshore nourishment projects on wave-dominated coasts.” *J. Mar. Sci. Eng.* 9 (11): 1182. https://doi.org/10.3390/jmse9111182.

Kobayashi, N., and H. Jung. 2012. “Beach erosion and recovery.” *J. Waterw. Port Coastal Ocean Eng.* 138 (6): 473–483. https://doi.org/10.1061/(ASCE)WW.1943-5460.0000147.

Krafft, D. R., D. L. Young, K. E. Brutsche, B. C. McFall, and B. L. Bruder. 2020. *Nearshore placement workshop 2019: Sediment nourishment of the nearshore environment*. ERDC/CHL SR-20-02. Vicksburg, MS: Engineer Research and Development Center (ERDC).

Larson, M., and N. C. Kraus. 1992. *Analysis of cross-shore movement of natural longshore bars and material placed to create longshore bars*. Technical Rep. No. DRP-92-5. Vicksburg, MS: USACE.

Larson, M., J. Palalane, C. Fredriksson, and H. Hanson. 2016. “Simulating cross-shore material exchange at decadal scale. Theory and model component validation.” *Coastal Eng.* 116: 57–66. https://doi.org/10.1016/j.coastaleng.2016.05.009.

Li, Y., C. Zhang, W. Dai, D. Chen, T. Sui, M. Xie, and S. Chen. 2022. “Laboratory investigation on morphology response of submerged artificial sandbar and its impact on beach evolution under storm wave condition.” *Mar. Geol.* 443: 106668. https://doi.org/10.1016/j.margeo.2021.106668.

Lodder, Q. J., and P. Sørensen. 2016. “Comparing the morphological behaviour of Dutch–Danish shoreface nourishments.” In *Coastal management: Changing coast, changing climate, changing minds*, edited by A. Baptiste, 397–406. London: ICE.

Luettich, R. A., and J. J. Westerink. 2004. “Formulation and Numerical Implementation of the 2D/3D ADCIRC Finite Element Model Version 44.XX.” Accessed February 23, 2024. https://adcirc.org/wp-content/uploads/sites/2255/2018/11/adcirc_theory_2004_12_08.pdf.

Luettich, R. A., J. J. Westerink, and N. W. Scheffner. 1992. *ADCIRC: An advanced three-dimensional circulation model for shelves, coasts, and estuaries; report 1, theory and methodology of ADCIRC-2DDI and ADCIRC-3DL*. Technical Rep. DRP-92-6. Vicksburg, MS: US Army Engineer Waterways Experiment Station.

Luijendijk, A., G. Hagenaars, R. Ranasinghe, F. Baart, G. Donchyts, and S. Aarninkhof. 2018. “The state of the world’s beaches.” *Sci. Rep.* 8 (1): 1–11. https://doi.org/10.1038/s41598-018-24630-6.

Males, R. M., M. B. Gravens, D. A. Moser, and C. M. Rogers. 2007. “Beach-fx: Life-cycle risk analysis of shore protection projects.” In *Proc., 30th Int. Conf. on Coastal Engineering*, edited by J. M. Smith. Singapore: World Scientific.

Massey, T. C., T. V. Wamsely, and M. A. Cialone. 2011. “Coastal Storm Modeling-System Integration.” *In Solutions to Coastal Disasters 2011*, edited by L. A. Wallendorf, C. Jones, L. Ewing, and B. Battalio, 99-108: Reston, VA: ASCE

McCall, R. T., J. V. T. De Vries, N. Plant, A. Van Dongeren, J. Roelvink, D. Thompson, and A. Reniers. 2010. “Two-dimensional time dependent hurricane overwash and erosion modeling at Santa Rosa Island.” *Coastal Eng.* 57 (7): 668–683. https://doi.org/10.1016/j.coastaleng.2010.02.006.

McFall, B. C., K. E. Brutsché, J. D. Ousley, C. K. Maglio, and J. A. Engle. 2017. “Innovative nearshore berm placement techniques at Vilano Beach, FL and application of the sediment mobility tool.” *World Dredging* 51 (1/2): 34–35.

McFall, B. C., K. E. Brutsché, A. M. Priestas, and D. R. Krafft. 2021. “Evaluation techniques for the beneficial use of dredged sediment placed in the nearshore.” *J. Waterw. Port Coastal Ocean Eng.* 147 (5): 04021016. https://doi.org/10.1061/(ASCE)WW.1943-5460.0000648.

McGill, S. P., B. D. Harris, B. C. McFall, D. R. Krafft, R. L. Bain, N. R. Olsen, I. W. Conery, and M. A. Chasten. 2022. “Morphological

This work is made available under the terms of the Creative Commons Attribution 4.0 International license.

analysis of a nearshore nourishment along the Atlantic Coast of New Jersey, USA." *J. Mar. Sci. Eng.* 10 (11): 1622. https://doi.org/10.3390/jmse10111622.

Melby, J. A., F. Diop, N. C. Nadal-Caraballo, D. Green, and V. M. Gonzalez. 2015. "Coastal hazards system." In *Proc., Coastal Structures and Solutions to Coastal Disasters Joint Conf.* Reston, VA: ASCE.

Melby, J. A., N. C. Nadal-Caraballo, and V. M. Gonzalez. 2017. "Uncertainty in coastal structure reliability." In *Proc., Coasts, Marine Structures and Breakwaters 2017 Conf*. Liverpool, UK: ICE.

Melby, J. A., et al. 2021. *Coastal Texas protection and restoration feasibility study: Coastal Texas flood risk assessment: Hydrodynamic response and beach morphology*. ERDC/CHL TR-21-11. Vicksburg, MS: US Army Engineer Research and Development Center.

Moser, D. A., M. B. Gravens, R. M. Males, M. J. Wutkowski, and C. M. Rogers. 2007. "Life-cycle risk analysis approach to coastal storm damage reduction planning." In *Proc*., *30th* Int. Conf. *on* Coastal Engineering, edited by J. M. Smith, 1851–1861. Singapore: World Scientific.

Nadal-Caraballo, N. C., J. A. Melby, V. M. Gonzalez, and A. T. Cox. 2015. *Coastal storm hazards from Virginia to Maine*. ERDC/CHL TR-15-5. Vicksburg, MS: US Army Engineer Research and Development Center.

NOAA National Centers for Environmental Information (NCEI) U.S. Billion-Dollar Weather and Climate Disasters. 2024. Accessed October 18, 2024. https://www.ncei.noaa.gov/access/billions/.

Otay, E. N. 1994. "Long-term evolution of nearshore disposal berms." Ph.D. thesis, Coastal and Oceanographic Engineering, Univ. of Florida.

Otay, E. N. 1995. "Monitoring results of a nearshore disposal berm." In *Proc., Int. Conf. on Coastal Research in Terms of Large Scale Experiments*, 547–558. Reston, VA: ASCE.

Palalane, J., C. Fredriksson, B. Marinho, M. Larson, H. Hanson, and C. Coelho. 2016. "Simulating cross-shore material exchange at decadal scale. Model application." *Coastal Eng.* 116: 26–41. https://doi.org/10.1016/j.coastaleng.2016.05.007.

Pan, Y., C. Kuang, J. Zhang, Y. Chen, X. Mao, Y. Ma, Y. Zhang, Y. Yang, and R. Qiu. 2017. "Postnourishment evolution of beach profiles in a low-energy sandy beach with a submerged berm." *J. Waterw. Port Coastal Ocean Eng.* 143 (4): 05017001. https://doi.org/10.1061/(ASCE)WW.1943-5460.0000384.

Pelnard-Considere, R. 1956. "Essai de theorie de l'evolution des formes de rivage en plages de sable et de galets, Société hydrotechnique de France." [In French.] *Les Energies De La Mer* 4 (1): 289–298.

Pinto, C. A., R. Taborda, C. Andrade, P. Baptista, P. A. Silva, D. Mendes, and J. Pais-Barbosa. 2022. "Morphological development and behaviour of a shoreface nourishment in the Portuguese western coast." *J. Mar. Sci. Eng.* 10 (2): 146. https://doi.org/10.3390/jmse10020146.

Roelvink, D., A. Reniers, A. P. Van Dongeren, J. V. T. De Vries, R. McCall, and J. Lescinski. 2009. "Modelling storm impacts on beaches, dunes and barrier islands." *Coastal Eng.* 56 (11–12): 1133–1152. https://doi.org/10.1016/j.coastaleng.2009.08.006.

Rogers, C. M., K. A. Jacobson, and M. B. Gravens. 2009. *Beach-fx user's manual: Version 1.0*. ERDC/CHL SR-09-6. Accessed October 18, 2024. https://hdl.handle.net/11681/1854.

Smith, E. R., M. C. Mohr, and S. A. Chader. 2017. "Laboratory experiments on beach change due to nearshore mound placement." *Coastal Eng.* 121: 119–128. https://doi.org/10.1016/j.coastaleng.2016.12.010.

Smith, J. M., A. R. Sherlock, and D. T. Resio. 2001. *STWAVE: Steady-state spectral wave model user's manual for STWAVE, version 3.0*. ERDC/CHL SR-01-1. Vicksburg, MS: USACE Engineer Research and Development Center.

van Duin, M. J. P., N. R. Wiersma, D. J. R. Walstra, L. C. Van Rijn, and M. J. F. Stive. 2004. "Nourishing the shoreface: Observations and hindcasting of the Egmond case, The Netherlands." *Coastal Eng.* 51 (8–9): 813–837. https://doi.org/10.1016/j.coastaleng.2004.07.011.

Vera-Cruz, D. 1972. "Artificial nourishment of Copacabana beach." In *Proc., 13th Int. Conf. on Coastal Engineering*, 1451–1463. Reston, VA: ASCE.

Vousdoukas, M. I., L. Mentaschi, E. Voukouvalas, M. Verlaan, S. Jevrejeva, L. P. Jackson, and L. Feyen. 2018. "Global probabilistic projections of extreme sea levels show intensification of coastal flood hazard." *Nat. Commun.* 9 (1): 2360. https://doi.org/10.1038/s41467-018-04692-w.

Walker, B. M., D. R. Krafft, B. C. McFall, H. McCaw, and S. L. Spurgeon. 2022. *Current state of practice of nearshore nourishment for the United States Army Corps of Engineers*. ERDC/CHL SR-22-4. Vicksburg, MS: US Army Engineer Research and Development Center.

Wang, P., K. E. Brutsche, J. W. LaGrone, T. M. Beck, J. D. Rosati, and L. S. Lillycrop. 2013. *Performance monitoring of a nearshore berm at Ft. Myers Beach, Florida*. ERDC/CHL TR-13-11. Vicksburg, MS: USACE.

Westerink, J. J., C. A. Blain, R. A. Luettich Jr, and N. W. Scheffner. 1994. *ADCIRC: An advanced three-dimensional circulation model for shelves coasts and estuaries, report 2: Users manual for ADCIRC-2DDI*, 156. Dredging Research Program Technical Rep. DRP-92-6. Vicksburg, MS: US Army Engineer Waterways Experiment Station.

Young, D. L., et al. 2020. *Analysis of nearshore placement of sediments at Ogden Dunes, Indiana*. ERDC/CHL TR-20-4. Vicksburg, MS: US Army Engineer Research and Development Center.

Zwamborn, J. A., G. A. W. Fromme, and J. B. FitzPatrick. 1970. "Underwater mound for the protection of Durban's beaches." In *Proc., 12th Int. Conf. on Coastal Engineering*, 975–994. Reston, VA: ASCE.

This work is made available under the terms of the Creative Commons Attribution 4.0 International license.

COLLIER COUNTY
COASTAL ADVISORY COMMITTEE (CAC)
Thursday, February 13th – 1:00 p.m.
Collier County Board Chambers
Collier County Government Center
3299 Tamiami Trail East, 3rd Floor, Naples, FL

Chairman Joe Burke, City of Naples
Linda Penniman, City of Naples
Erik Brecknitz, City of Marco Island
Joe Burke, Chairman
Jim Burke, Unincorporated Collier County
Bob Raymond, Unincorporated Collier County
Robert Roth
Dr. Judith Hushon
Steve Koziar
Bob Raymond
Dave Trecker

ALSO, PRESENT
Andy Miller, Coastal Zone Management
Colleen Greene, Managing Assistant County Attorney
Bob Middleton, City of Naples

Any person who decides to appeal a decision of This Board you will need a record of the proceedings pertaining thereto and therefore may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based, Neither Collier County nor This Board shall be responsible for providing this record.

1. **CALL TO ORDER**

2. **PLEDGE OF ALLEGIANCE**

3. **ROLL CALL (Skipped)**

4. **CHANGES AND APPROVAL OF AGENDA (with Changes)**
   Motion passed 8-0

5. **PUBLIC COMMENTS**

Patrick Wack, Seagate POA and Joanne Janney, Naples Gate
Restoration of Dunes & Vegetation at Clam Pass Park.

This Board cannot act on Public Comment. It must be a regular agenda item for that
Bob Roth, Linda Penniman, Joe Burke
Board questions specifics of the area in Question-*Clam Pass Park. High Tides might be an issue.*

Dave Trecker motioned to approve the budget amendment
Linda Penniman seconded
Motion passed 8-0

2. ES-2024 South Naples Emergency Berm
Recommendation to award Invitation to Bid ("ITB") No. 24-8323 in the amount of $1,178,500.00 to Earth Tech Enterprises, Inc. for the Collier County South Naples Emergency Berm truck haul & construction project, authorize the Chairman to sign the attached Agreement, and make a finding that this item promotes tourism. (Project 50280)

Joe Burke (?) motioned to approve
Linda Penniman seconded
Motion passed 8-0

3. ES-APTIM CO#1 – Park Shore

Recommendation to approve Change Order No. 1, adding $33,702.40 and 137 days to the Work Order under library contract 18-7432-CZ with APTIM Environmental & Infrastructure, LLC for the Park Shore Beach Renourishment; and make a finding that this item promotes tourism (Project 90067).

Dave Trecker (?) motioned to approve the budget amendment
Linda Penniman seconded
Motion passed 8-0

4. ES-APTIM CO#2 – Park Shore

Recommendation to approve Change Order No. 2 for contract No. 24-8292 with Earth Tech Enterprises, Inc. for the Park Shore Beach Renourishment, increasing the contract amount by $2,739,153, applying the Allowance of $254,000.00 and adding 30 days to the contract time; approve Necessary budget amendment; and make a finding that this item promotes tourism (Project 90067).

Dr. Judith Hushon motioned to approve the budget amendment
Linda Penniman seconded
Motion passed 8-0

9. OLD BUSINESS
Protecting Beach Dunes-Dune Fencing
White paper was prepared by Joseph Burke as a high level evaluation of potential use of sand fencing for dune sand accretion and protection from pedestrian traffic. Dune barriers are also reviewed.

Joe Burke
Sand fencing may not be necessary.

Funding for Tigertail lagoon 'Ecological restoration' on Marco Island

- Letter from Andrew Tyler opposing continued restoration efforts discussed.

- Concerns about environmental impacts vs. protection of property. Suggestion to have project engineer present at next meeting.

Linda Penniman exits meeting (2:24)

Sunshine State Law - Colleen Greene

- All Board members must follow Sunshine Law (Official business must not be discussed privately)
- Applies to written correspondence as well as Social Media.

10. ANNOUNCEMENTS

None

11. COMMITTEE MEMBER DISCUSSION

None

12. NEXT MEETING DATE/LOCATION

March 13, 2025 at 1:00 p.m.

13. ADJOURNMENT

There being no further business for the good of The County, the Coastal Advisory Committee Hearing was adjourned at 2:41 p.m.

Collier County Coastal Advisory Committee

Chairman Joe Burke

The Minutes were approved by

Joe Burke

Name

Signature

as presented on _____

or amended on 3/13/25

Three points were mentioned:

- *Will this be a viable Solution to the issue?*
- *The Solution must meet with Environmental guidelines*
- *Regulation*

Andy Miller
Will look into it.

Public Speaker Patrick delivers comments
Board
Answers will be delivered at the next meeting.
Solution to the issue will likely be inexpensive.

6. APPROVAL OF CAC MINUTES December 12th, 2024
A few errors were found and need to be fixed.
Dr. Judith Hushon moved to approve the minutes with amendments
Joe Burke seconded
Motion passed 8-0

7. STAFF REPORTS
Extended Revenue Report
Andy Miller reported good revenue collection so far, above budget estimations. No further staff reports presented.

8. NEW BUSINESS
1. ES – City of Naples Outfall Project
Recommendation to accept the report from the City of Naples Tourism Impact Study for the Stormwater Outfall Pipe Removal and make a finding that this action promotes tourism.

Andy Miller
Stormwater Outfall Cleanup.
Bob Middleton presented an overview for the stormwater project aiming to improve water quality and flood protection.
Funding for this project needed from the TDC ($10M)
This project will allow for improving the overall water quality, offer protection from flooding, & have a positive impact on Tourist Activities.

Dave Trecker & Judith Hushon
Pipe Construction to begin at the end of February, 2025 & will proceed for two years.

Bob Roth
Concerns about water contamination regarding Alligator Lake.
Joe Burke, D. Trecker
Generators, Pumps, etc.
The result of the project would be a 95% improvement in water purity.

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliergov.net
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

March 17, 2025

FOR IMMEDIATE RELEASE

Notice of Public Meeting
Collier County Code Enforcement Board
Collier County, Florida

March 27, 2025
9:00 a.m.

Notice is hereby given that the **Collier County Code Enforcement Board** will meet on **Thursday, March 27, 2025, at 9:00 a.m.** in the Board of County Commissioners Chambers, third floor, Collier County Government Center, 3299 Tamiami Trail E., Naples, Florida. The meeting will be broadcast live with closed captioning on Collier Television channel 97/98 and via live streaming at www.colliercountyfl.gov/ctv.

About the public meeting:

Two or more members of the Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future Board of County Commissioners meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48-hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Thomas Iandimarino at (239) 252-5706.

###

COLLIER COUNTY
Code Enforcement Board
Nuisance Abatement Board

AGENDA

Board of County Commission Chambers
Collier County Government Center
3299 Tamiami Trail East, 3rd Floor
Naples, FL 34112

March 27, 2025
9:00 AM

Robert Kaufman, Chair
Kathleen Elrod, Member
Sue Curley, Member
John Fuentes, Member
Lee Rubenstein, Member
Tarik N. Ayasun, Member
Manmohan "Bart" N. Bhatla, Member
Vacant, Alternate
Vacant, Alternate

Notice: Respondents may be limited to twenty (20) minutes for case presentation unless additional time is granted by the Board. Persons wishing to speak on any agenda item will receive up to five (5) minutes unless the time is adjusted by the Chairman.

All parties participating in the public hearing are asked to observe Roberts Rules of Order and speak one at a time so that the court reporter can record all statements being made.

Any person who decides to appeal a decision of this Board will need a record of the proceedings pertaining thereto, and therefore may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. Neither Collier County nor the Code Enforcement Board shall be responsible for providing this record.

1. **Pledge of Allegiance**

2. **Roll Call**

3. **Approval of Minutes**

4. **Approval of Agenda**

5. **Public Hearings/Motions**

5.A. Motions

5.A.1. Motion for Continuance of Imposition of Fines Hearing

5.A.2. Motion for Extension of Compliance Deadline

5.A.2.1. CASE NO: **CEVR20230003385**

OWNER: **Mario Ignacio Santos Molina**
OFFICER: Cristina Perez
VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 10.02.06(B)(1)(a), 10.02.06(B)(1)(e) and 10.02.06(B)(1)(e)(i). Unpermitted site work to include removal of native vegetation, grading, and adding fill prior to the issuance of a permit that would allow the improvement of the property.

FOLIO NO: 37287360002
PROPERTY ADDRESS: 363 6th Street NE, Naples, FL 34120

5.A.2.2. CASE NO: **CEROW20230005401**

OWNER: **Mario Ignacio Santos Molina**
OFFICER: Cristina Perez
VIOLATIONS: Collier County Code of Laws and Ordinances, Chapter 110, Article II, Section 110-31(a). Construction/work activity on site prior to obtaining a Right-of-Way permit.

FOLIO NO: 37287360002
PROPERTY ADDRESS: 363 6th Street NE, Naples, FL 34120

5.A.2.3. CASE NO: **CESD20220005510**

OWNER: **Priscilla Cisneros and Sergio Garcia**
OFFICER: Craig Cooper
VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 10.02.06(B)(1)(a), 10.02.06(B)(1)(e) and 10.02.06(B)(1)(e)(i). A mobile home and a roof structure were added to this property before obtaining a Collier County Building Permit.

FOLIO NO: 00111720004
PROPERTY 571 Platt Rd, Naples, FL 34120

ADDRESS:

5.A.3. Motion for Re-Hearing

5.B. Stipulations (Non-Contested Cases and Present at the Hearing)

5.C. Emergency Cases

5.D. Hearings

5.D.1. CASE NO: **CESD20240004325**

OWNER: **Derrick Grove and Myra Grove**
OFFICER: Rickey Migal
VIOLATIONS: Collier County Land Development Code 04-41, as amended, Section 10.02.06(B)(1)(a), and the Florida Building Code 109.1. Permit PPRBD20160728783 has expired with outstanding fees due.
FOLIO NO: 72650001429
PROPERTY ADDRESS: 2422 Butterfly Palm Dr, Naples, FL 34119

5.D.2. CASE NO: **CEPF20240009825**

OWNER: **Maria A Nolasco and Yasmine Orosa**
OFFICER: Wade Cohen
VIOLATIONS: Florida Building Code 8th Edition (2023), Chapter 1, Section 109.1. Permit PRBD20190521824 has expired with fees due.
FOLIO NO: 34550000788
PROPERTY ADDRESS: 8809 Madrid Circle, Naples, FL 34104

5.D.3. CASE NO: **CENA20240011616**

OWNER: **Robert P Pekar**
OFFICER: Thomas Pitura
VIOLATIONS: Collier County Code of Laws and Ordinances, Chapter 54, Article VI, Section 54-181, and Collier County Land Development Code 04-41, as amended, Section 2.02.03. Wood fencing, furniture, and miscellaneous construction materials stored on the property.
FOLIO NO: 29780720005
PROPERTY ADDRESS: 1034 Highlands Dr, Naples, FL 34103

5.D.4. CASE NO: **CEROW20250000244**

OWNER: **Robert P Pekar**
OFFICER: Thomas Pitura
VIOLATIONS: Collier County Code of Laws and Ordinances, Chapter 110, Article II, Section 110-31(a). Stone pacers placed in the Right-of-Way
FOLIO NO: 29780720005

PROPERTY ADDRESS: 1034 Highlands Dr, Naples, FL 34103

5.D.5. CASE NO: **CESD20230003365**

OWNER: **DHOME BUILDERS INC**

OFFICER: Charles Marinos

VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 10.02.06(B)(1)(a) and 10.02.06(B)(1)(e)(i). A double-wide trailer home with plumbing and electric utilities, with an addition added to the back and a front deck/stairs/ramp added to the front. A small shed placed in the front of the permanent structure on site. No permits on file.

FOLIO NO: 37591560006

PROPERTY ADDRESS: 711 18th Ave NW, Naples, FL 34120

5.D.6. CASE NO: **CENA20230003369**

OWNER: **DHOME BUILDERS INC**

OFFICER: Charles Marinos

VIOLATIONS: Collier County Code of Laws and Ordinances, Chapter 54, Article VI, Section 54-181, and Collier County Land Development Code 04-41, as amended, Section 2.02.03. An improved estates zoned property with an accumulation of litter including but not limited to the following: A/C equipment, roofing tiles, building materials, a shipping container, vehicle parts, appliances, tools, furniture, organic materials, wood, plastic, paper, cardboard, metal, and glass.

FOLIO NO: 37591560006

PROPERTY ADDRESS: 711 18th Ave NW, Naples, FL 34120

6. Old Business

6.A. Motion for Reduction/Abatement of Fines

6.B. Motion for Imposition of Fines and Liens

6.B.1. CASE NO: **CESD20230007241**

OWNER: **Richard Brian Peterman and Cynthia Marie Eddy**

OFFICER: Jason Packard

VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 10.02.06(B)(1)(a), 10.02.06(B)(1)(e) and 10.02.06(B)(1)(e)(i). Interior renovations including but not limited to plumbing and electrical work completed prior to issuance of appropriate Collier County permits/approvals.

FOLIO NO: 76775001724

PROPERTY ADDRESS: 6900 Anthurium Ln, Naples, FL 34113

6.B.2. CASE NO: **CESD20230009809**

OWNER: **Dina Maribel Vasquez Guillen**
OFFICER: Delicia Pulse
VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 10.02.06(B)(1)(a) and 10.02.06(B)(1)(e)(i). Storage container has been added to a mobile home and is being used as living space without obtaining the required permitting.

FOLIO NO: 50891120000
PROPERTY ADDRESS: 2626 Holly Ave, Naples, FL 34112

6.B.3. CASE NO: **CEPM20180014849**

OWNER: **Henry Schulman**
OFFICER: Jonathan Musse
VIOLATIONS: Collier County Code of Laws and Ordinances, Chapter 22, Article VI, Sections 22-228(1). Dwelling destroyed by fire.

FOLIO NO: 454760006
PROPERTY ADDRESS: 5525 Lee Williams Rd, Naples, FL 34117

6.B.4. CASE NO: **CESD20210004109**

OWNER: **VIAGE MARINAS LLC**
OFFICER: Stephanie Guttum
VIOLATIONS: Collier County Land Development Code 04-41, as amended, Section 10.02.06(B)(1)(a). Boat storage racks have been constructed without the required permitting.

FOLIO NO: 48173280007
PROPERTY ADDRESS: 3470 Bayshore DR, Naples, FL 34112

6.B.5. CASE NO: **CESD20190014719**

OWNER: **Ulysses Nabal Jaen**
OFFICER: Thomas Pitura
VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 10.02.06(B)(1)(a) and 10.02.06(B)(1)(e). Storage shed built without the required Collier County building permits, inspections and certificate of completion.

FOLIO NO: 38104720009
PROPERTY ADDRESS: 2890 68th St SW, Naples, FL 34105

6.B.6. CASE NO: **CELU20210010367**

OWNER: **IRON RANCH CONTAINERS INC**
OFFICER: Charles Marinos

VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 1.04.01(A) and 2.02.03. Storing vehicles, mobile homes, and storage containers is not allowable use for this undeveloped Ag zoned property. Office trailers on property without permits or County approval.

FOLIO NO: 304280005

PROPERTY ADDRESS: 1340 Dove Tree St, Naples, FL 34117

6.B.7. CASE NO: **CEVR20210010368**

OWNER: **IRON RANCH CONTAINERS INC**

OFFICER: Charles Marinos

VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 3.05.01(B) and 10.02.06(B)(1)(a). Removal of native and/or Prohibited Exotic vegetation from unimproved property using heavy machinery without first obtaining required vegetation removal permit from Collier County and local and/or State approval.

FOLIO NO: 304280005

PROPERTY ADDRESS: 1340 Dove Tree St, Naples, FL 34117

6.B.8. CASE NO: **CEVR20210009902**

OWNER: **IRON RANCH CONTAINERS INC**

OFFICER: Charles Marinos

VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 3.05.01(B) and 10.02.06(B)(1)(a). Removal of native and/or Prohibited Exotic vegetation from unimproved property using heavy machinery without first obtaining required vegetation removal permit from Collier County and local and/or State approval.

FOLIO NO: 304320004

PROPERTY ADDRESS: 1370 Dove Tree St, Naples, FL 34117

6.B.9. CASE NO: **CESD20230001825**

OWNER: **PALM LAKE MHP LLC CO PHILIPS INTERNATIONAL HOLDING CORP**

OFFICER: Stephanie Guttum

VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 10.02.06(B)(1)(a) and 10.02.06(B)(1)(e)(i). Modifications have been made to this mobile home, including but not limited to enclosing the MH in a framed shell – 4 walls and a roof over roof – and the add-on storage area that were done without the required county permits.

FOLIO NO: 61842240009

PROPERTY ADDRESS: 3131 Tamiami Trail E Lot 52, Naples, FL 34112

6.B.10. CASE NO: **CESD20220005381**

OWNER: **PSB LAND TRUST**

OFFICER: Jonathan Musse

VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 10.02.06(B)(1)(a) and 10.02.06(B)(1)(e)(i). Multiple improvements to the dwelling to include converting the garage into living space, room addition and roof extension to the right rear of the dwelling, adding exterior windows, adding stucco to the entry way, replacing the garage door with an exterior wall, and replacing an exterior window with an exterior door on the left side of the dwelling.

FOLIO NO: 62205480007

PROPERTY ADDRESS: 5373 Holland St, Naples, FL 34113

6.B.11. CASE NO: **CESD20220004521**

OWNER: **German Diaz Sanchez and Taimi Nunez Martinez**

OFFICER: Payten Curl

VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 10.02.06(B)(1)(a) and 10.02.06(B)(1)(e)(i). A residentially zoned property with a previously permitted open side overhang modified to a closed structure prior to obtaining proper permitting.

FOLIO NO: 36314920002

PROPERTY ADDRESS: 5148 23rd Ct SW, Naples, FL 34116

6.B.12. CASE NO: **CESD20220006947**

OWNER: **Emanuel Pipitone and Valentina Pipitone**

OFFICER: Wade Cohen

VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 10.02.06(B)(1)(a), 10.02.06(B)(1)(e) and 10.02.06(B)(1)(e)(i). Condominium with interior renovations done prior to issuance of proper permitting including the following: drywall, plumbing, electrical, counters and cabinets, A/C replacement and breaker panel replacement.

FOLIO NO: 31980480007

PROPERTY ADDRESS: 4339 27th Ct SW Unit 104, Naples, FL 34116

6.B.13. CASE NO: **CESD20240003618**

OWNER: **Jean Michel Bijou and Marie R Innocent**

OFFICER: Payten Curl

VIOLATIONS: Collier County Land Development Code 04-41, as amended, Sections 10.02.06(B)(1)(a), 10.02.06(B)(1)(e) and 10.02.06(B)(1)(e)(i). Violations consist of but not limited to: plumbing, electrical, sewer plumbing, and additions made on to the shed.

FOLIO NO: 36321280007

PROPERTY ADDRESS: 5459 28th Avenue SW, Naples, FL 34116

6.C. Motion to Rescind Previously Issued Order

6.D. Motion to Amend Previously Issued Order

7. New Business

8. Consent Agenda

8.A. Request to Forward Cases to County Attorney's Office as Referenced in Submitted Executive Summary.

9. Reports

10. Comments

11. Nuisance Abatement Board

11.A. Hearings

12. Next Meeting Date - THURSDAY APRIL 24, 2025, AT 9:00AM

13. Adjourn

Collier County

Growth Management Community Development Department

Development Services Advisory Committee Meeting

Wednesday, March 05, 2025
3:00 pm

North Collier Regional Park (NCRP)
Administration Building – Exhibit Hall
15000 Livingston Road
Naples, FL 34109

Please contact Heather Cartwright-Yilmaz at (239) 252-8389 if you have any questions or wish to meet with staff.

Development Services Advisory Committee

Agenda
Wednesday, March 05, 2025
3:00 pm
North Collier Regional Park (NCRP)
Administration Building - Exhibit Hall
15000 Livingston Road
Naples, FL 34109

NOTICE:
Persons wishing to speak on any Agenda item will receive up to three (3) minutes unless the Chairman adjusts the time. Speakers are required to fill out a "Speaker Registration Form", list the topic they wish to address, and hand it to the Staff member before the meeting begins. Please wait to be recognized by the Chairman and speak into a microphone. State your name and affiliation before commenting. During the discussion, Committee Members may direct questions to the speaker.

Please silence cell phones and digital devices. There may not be a break in this meeting. Please leave the room to conduct any personal business. All parties participating in the public meeting are to observe Roberts Rules of Order and wait to be recognized by the Chairman. Please speak one at a time and into the microphone so the Hearing Reporter can record all statements being made.

1. Call to Order – Chairman
2. Approval of Agenda
3. Approval of Minutes:
    a. DSAC: 02.05.2025 (Page: 10)
4. Public Speakers
5. Staff Announcements/Updates
    a. Zoning Division – [**Mike Bosi**]
    b. Community Planning & Resiliency Division – [**Christopher Mason**]
    c. Housing Policy & Economic Development Division. **– [Cormac Giblin**]
    d. Development Review Division – [**Jaime Cook**]
    e. Operations & Regulatory Mgmt. Division – [**Michael Stark**]
    f. Building Review & Permitting Division- [**John McCormick**]

g. Collier County Fire Review – [**Michael Cruz, Captain**]

h. North Collier Fire Review – [**Chief Sean Lintz or designee**]

i. Code Enforcement Division – [**Thomas Iandimarino**]

j. Public Utilities Department – [**Matt McLean or designee**]

k. Transportation Management Services

Transportation Engineering Division – [**Jay Ahmad or designee**]

6. New Business
    a. Administrative Code
7. Old Business
8. Committee Member Comments
9. Adjourn

FUTURE MEETING DATES:

April 02, 2025 – 3:00 PM
May 07, 2025 – 3:00 PM
June 04, 2025 – 3:00 PM

MINUTES OF THE COLLIER COUNTY
DEVELOPMENT SERVICES ADVISORY COMMITTEE MEETING

Naples, Florida
February 05, 2025

LET IT BE REMEMBERED, the Collier County Development Services Advisory Committee Meeting and Collier County, having conducted business herein, met on this date at 3:00 PM in REGULAR SESSION at the Collier County Growth Management Community Department Building, Conference Room #609/610, 2800 N. Horseshoe Dr., Naples, Florida, 34102 with the following members present:

Chairman:	William J. Varian
Vice Chairman:	Blair Foley
	Clay Booker
	James Boughton
	Jeffrey Curl
	Laura Spurgeon DeJohn
	John English
	Marco Espinar
	Norm Gentry
	Nicholas Kouloheras
	Mark McLean
	Chris Mitchell
	Robert Mulhere
	Hannah Roberts – AHAC – Non-Voting
	Jeremy Sterk
	Mario Valle

The following County staff were in attendance
Mike Bosi – Director, Zoning Division
Christopher Mason – Director, Community Planning & Resiliency Division, GMCD
Jaime Cook – Director, Development Review Division, GMCD (Excused)
Michael Stark – Director, Operations & Regulatory Management Division, GMCD
John McCormick – Director, Building Review & Permitting Division, GMCD
Michael Cruz – Captain, Collier County Fire Review
Bryan Horbal – Captain, North Collier Fire Review
Thomas Iandimarino – Director, Code Enforcement, GMCD
Claudia Vargas – Project Manager I, Engineering & Project Management, PUD
Mark Sawyer – Project Manager II, Transportation Planning – Transportation Engineering
Heather Yilmaz – Management Analyst, Staff Liaison - GMCD

Any person who decides to appeal a decision of This Board you will need a record of the proceedings pertaining thereto, and therefore may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based, Neither Collier County nor This Board shall be responsible for providing this record.

1. **CALL TO ORDER– Chairman**
   Chairman Varian
   Development Service Advisory Committee, Wednesday, 5th February 2025

2. **APPROVAL OF AGENDA**
   Motion made to approve and seconded
   Agenda approved unanimously

3. **APPROVAL OF MINUTES**
   a. DSAC Utility Subcommittee: October 29, 2024
   b. DSAC Utility Subcommittee: November 18, 2024
   c. DSAC: December 04, 2024
      Motion made to approve Meeting Minutes and seconded
      Minutes approved unanimously

4. **SELECTION OF COMMITTEE CHAIR AND VICE CHAIR**
   There was a motion to re-elect William Varian as Chairman
   Motion was seconded
   Motion passed

   There was a motion to re-elect Blair Foley as Vice Chair
   Motion was seconded
   Motion passed

5. **PUBLIC SPEAKERS**
   None

6. **STAFF ANNOUNCEMENTS**
   a. **Zoning Division – [Mike Bosi, Director]**
      - We discussed last week interviewing for a plaintiff reposition to offer a position. Still haven't been able to hire a planning comp planning manager. It's just been difficult. We continue to do what we can from a land entitlement standpoint.
      - We really haven't dropped off much. And I think what you're gonna hear when Mr. Stark comes up, talk about a little bit of the trailing off the, the trends within our building permits.
      - In terms of entitlement, we haven't seen a real decrease within the request. I'm still taking a number of growth management plan PD amendments for related to affordable housing projects. We keep adding at least modestly to the, to the supply. The rest of the entitlements continue on pretty strong.

- We've got a pretty busy February and March from the Planning Commission and Board of County Commissioners. We get a little slow down in summertime in terms of when we're allowed to take land lease petitions.

Clay Booker
Have you heard anything about Senate Bill 250 being extended?

Mike Bosi
Right now, it's till October 1st, 2026, and we wouldn't be surprised if the legislator takes another crack and sends it for another year or two.
I have heard there's been some discussion with Senator PA about potentially having the legislator weigh in on whether they believe PD should be eligible for the local and that would be something that would have an effect upon the County. So much of our zoning, so much of our commercial and industrial land is within the PD. So that's another thing we'll be paying attention to from the legislation.

b. Community Planning & Resiliency Division – [Christopher Mason, Director]

- We are working on a number of studies. We also have our CRS commitment for our tri-annual verification visit which is part of our FEMA commitment to reduce flood insurance premiums.
  The Coastal Storm Risk Management Feasibility Study has been paused.

Mark McLean
There are 2 companies that are installing floodgates without insurance or permits.

Christopher Mason
There has been dry flood proofing done, not tiger dams. This is only allowed for commercial buildings.

c. Economic Development & Housing Division – [Cormac Giblin, Director]

- The Board approved 90 more new additional affordable housing units as part of a development called the Tammy Mutual Greenway PUD. That brings our total fiscal year to date of approval is up to 420. And on the economic development, job creation front, this fiscal year to date, we've created 70 new high wage paying targeted industry jobs.
- The Board last week approved a new agreement with a Company called Arbor X for 14 more new additional jobs that'll be created over the next four years.

d. Development Review Division – [Jaime Cook, Director] Excused
No Report

e. Operations & Regulatory Mgmt. Division – [Michael Stark, Director]

- We received 4,143 permit applications
- 84 of the permits were related to Hurricane Helene
- 50 of these were from Hurricane Milton

- Average turnaround time for the intake staff remains at one day
- Zoning front desk team processed 936 survey conditions
- 13 short term vacation rentals
- 46 right of way renewals and hosted 37 pre-application meetings.
- We welcomed 1,367 customers to our business center and satellite offices
- The staff answered 6,075 calls, up from about 4,000
- There are 341 positions department wide and 56 open positions
- Our recruitment search is widespread, but it is a struggle to fill positions

f. Building Review & Permitting Division – [John McCormick, Director]

- 800 to 1000 inspections per day
- 5,000 permits a month
- There is substantial fraud happening from a stolen or misapplied digital seal issued to Gene Cravillion. The password to access his account has affected about 400 permits issued to architects, builders, designers in all types of buildings. It has been fraudulent since August 2022
- As a Director, it's my responsibility to keep this from happening again
- We are down 5 structural reviewers, and our pay scale is way under what candidates are expecting
- There is also turnover of employees that we use part time, and the turnover of temporary employees averages about 200%

g. Collier County Fire Review – [Michael Cruz, Captain]

- Active is going well at the end of that calendar year. We had a good year as a calendar year. I think productivity projects going out and so forth like that. Inspections are still on a two-day turnaround time for new construction. It's very active in our district. We hired two INS in the past 2 months, kind of like the of opposite what you've been hearing.
- They're working through the training process and this year we're probably looking at possibly hiring another two. We're gonna keep on broadening our base to meet the expectations of the contractors and to the public for the existing side.

h. North Collier Fire Review – [Bryan Horbal, Captain]

- Inspections for December
- 481 for building reviews for new construction
- We had a four-day turnaround on permits
- Planning reviews, a total of 46 with a two-day turnaround with a total of 1,216 new construction inspections.
- January was super busy 588 new construction reviews, building plans, reviews
- That was a four-day turnaround
- Planning reviews were 55 for the month and about a day and a half, two-day turnaround
- We had 1,408 new construction inspections for January

- A couple announcements. Chief Lynch was promoted to assistant chief. Sean is now the assistant chief of life safety and we'll be looking to fill the fire marshal role in his vacancy. Hopefully promoting somebody within.
- We have hired two new plan reviewers for a total of 7.
- We are looking to hire two more fire inspectors in the next budget year with growth and people retiring.
- We've got some retirees coming up probably in the next three or four years.
- Ritz residence is going strong on the corner of Vanderbilt as you can all see the new Publix off Oil Well is going well.
- And Kalea Bay Tower five is cranking now too. Two inspectors but they're looking at maybe four for next budget
- We don't have the same struggles because they're not looking at fire stuff, but they are looking at firewalls and fire barriers.
- We assist the County when it is a proper provider and have a lot of communication with the County inspector.

i. Code Enforcement Division – [Thomas Iandimarino, Director]

- Mr. French announced that the park rangers were coming over to work for code enforcement. We've inherited the park rangers and the enforcement of parking citations
- There is a QR code that is easy to use for paying for parking at Vanderbilt
- For the milestone inspections, once the building official turns those over to us, we open up a code case
- We send them a notice of violation to send to anybody else in code
- They get 30 days to comply
- If they fail to comply, we send them to assign them a hearing
- For Special Magistrate, we already have special magistrate days set aside for those hearings if we need them. It wouldn't take place on the regular office of special management hearing, which is the first Friday.
- We have other days throughout the year that we've had scheduled for other things in case we needed to use them. So, we would assign all of those at one time.

j. Public Utilities Engineering & Project Management Division – [Claudia Vargas, Project Manager]

- The documents presented at the utility subcommittee meeting were from the 2018 version and that did not include the updates approved by the board in 2021. As we bring the utility standard manual to the Board, it will incorporate the 2021 changes. It did not affect any of the changes that were presented at the utility subcommittee.

k. Transportation Management Services, Engineering Division – [Mark Sawyer, Project Manager II]

- A few status updates for you this afternoon. As far as our access management changes, we introduced this a few months ago with you. We met with the traffic engineers on October 4th and then again on November 13th. We went through the

preliminary updates and our findings and how that those adopting the FDOT standards were going to impact our access management.

- We came back on the 13th addressing their concerns. We are now anticipating having the final draft ready to go out next week for them. And that's gonna have all the changes in the edits for all the team members that attended those meetings. We anticipate going to the BCC on April 8th with the final documents.
- Next item is the Golden Gate Parkway study. The corridor study that is from Livingston to I 75. We are going to be having an open house information format public meeting on April 10th at the Golden Gate Community Center that'll be going out to the community.
- And then finally a good news item. We were able to get the 2024 A OIR approved by the board on January 28th. We normally get that done in December.

Blair Foley
Can we get a copy of that final report for the access management recommendations.

Mike Sawyer
It will go out to you when it goes out to the industry.

7. NEW BUSINESS
None

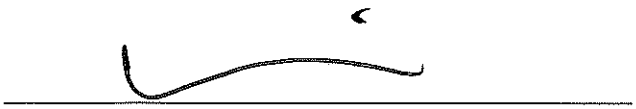
8. OLD BUSINESS
None

9. COMMITTEE MEMBER COMMENTS
Chairman Varian
Our next meeting will be held at the North Collier Regional Park.

10. ADJOURN

There being no further business for the good of the County, the meeting was adjourned at 4:02 p.m.

COLLIER COUNTY
DEVELOPMENT SERVICES ADVISORY COMMITTEE



William Varian, Chairman

These minutes were approved by the Committee/Chairman on 3/5/25,
(check one) as submitted ✓ or as amended _____.

Collier County

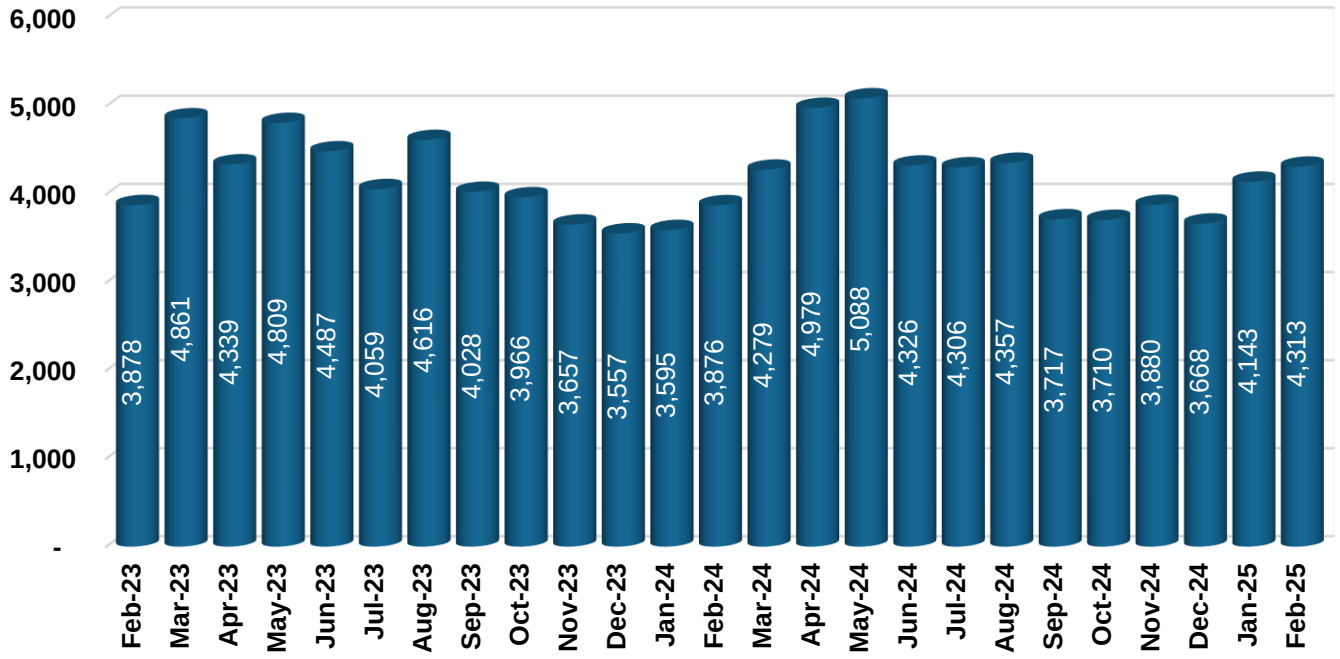
February 2025

Monthly Statistics

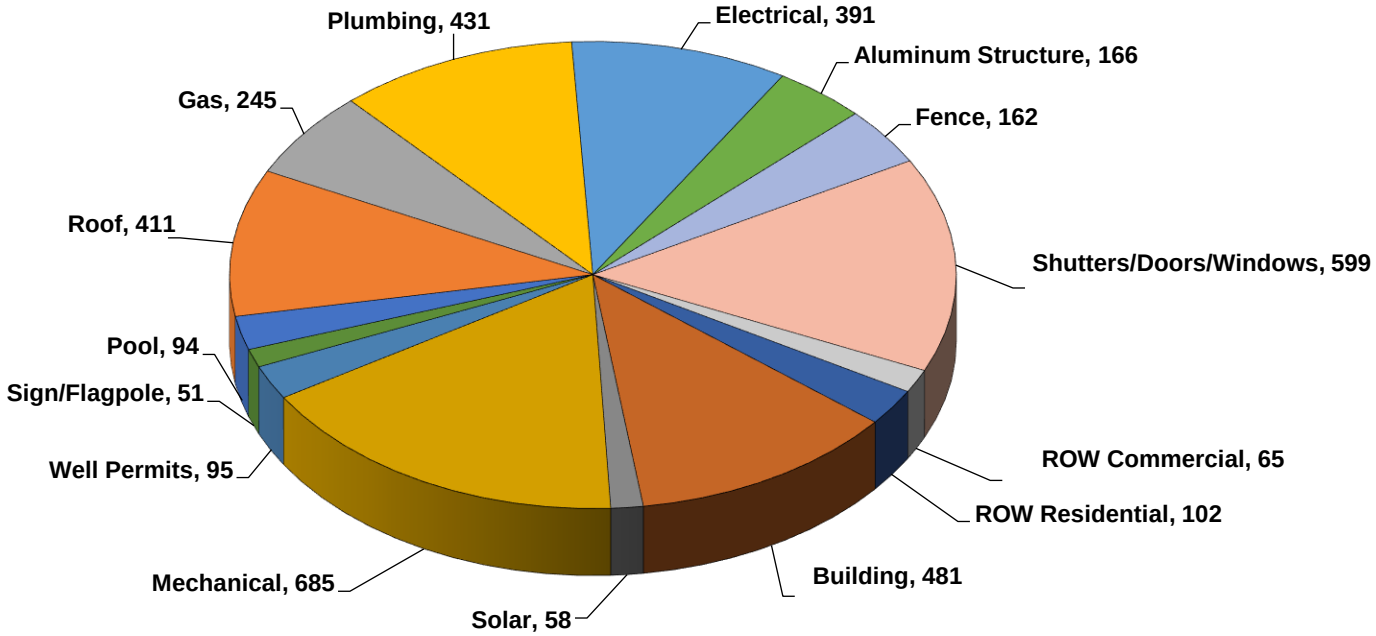


Building Plan Review Statistics

All Permits Applied by Month

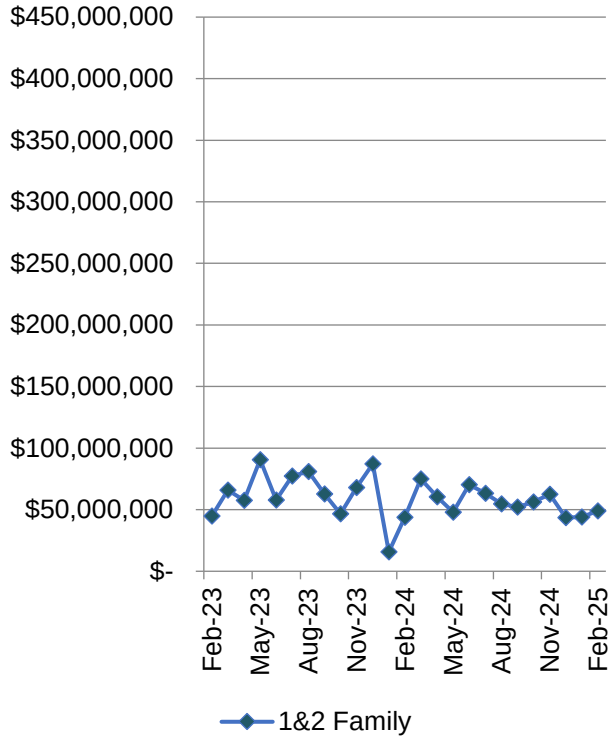


Top 15 of 35 Building Permit Types Applied

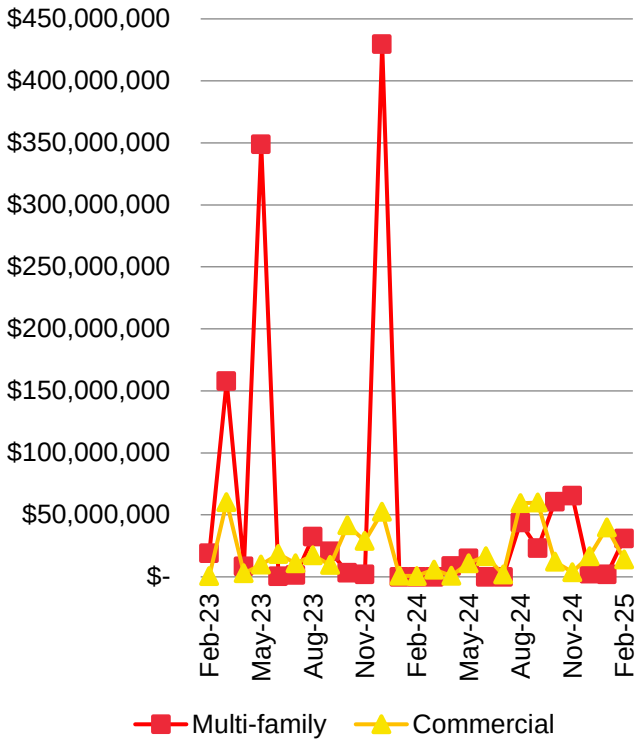


Building Plan Review Statistics

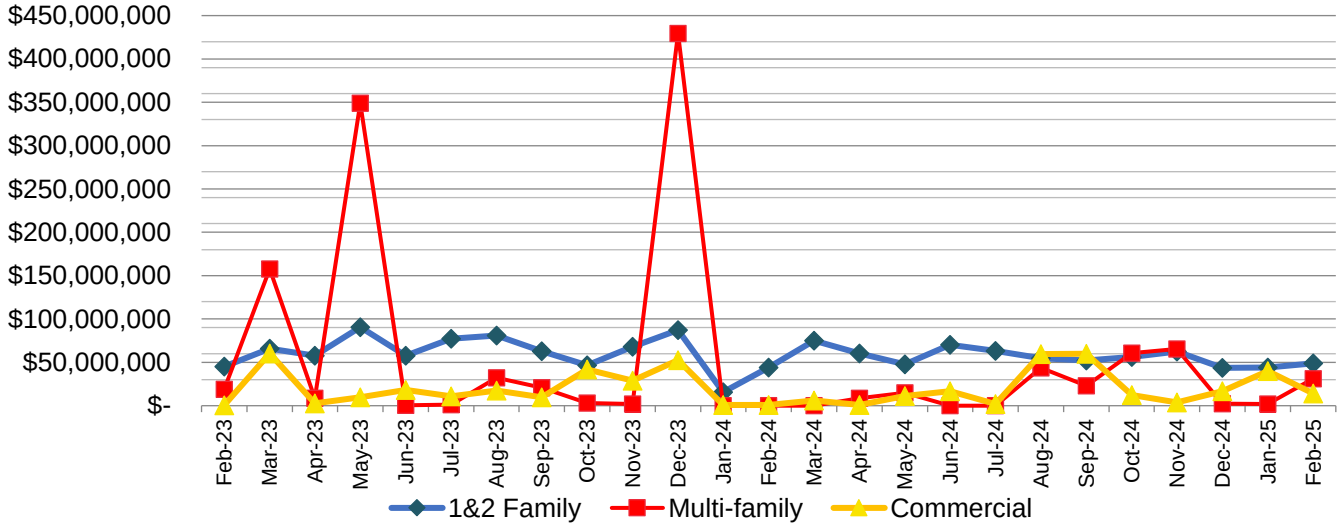
Monthly 1 & 2 Family Total Construction Value by Applied Date



Monthly Multi-family & Commercial Total Construction Value by Applied Date

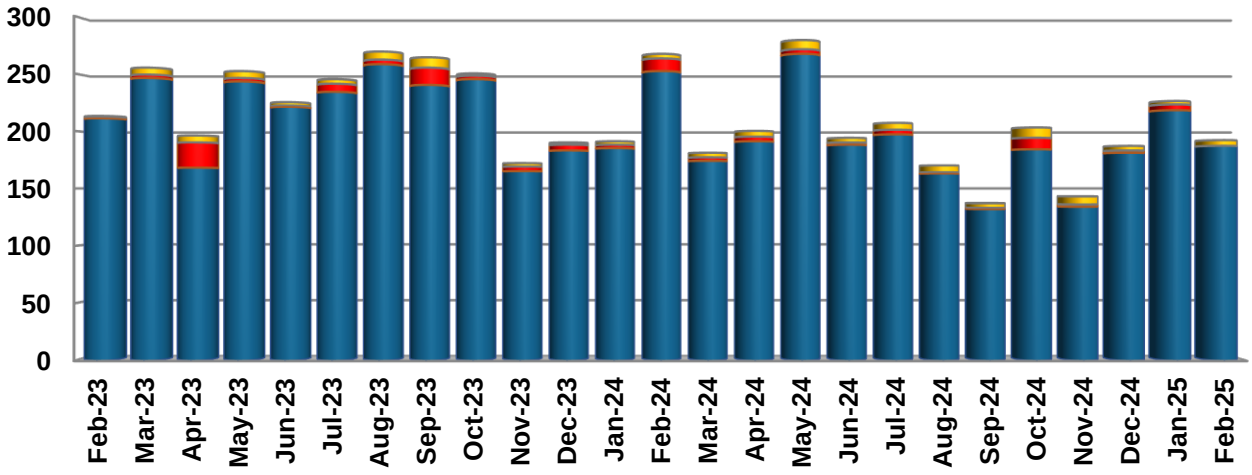


Monthly Total Construction Value by Applied Date



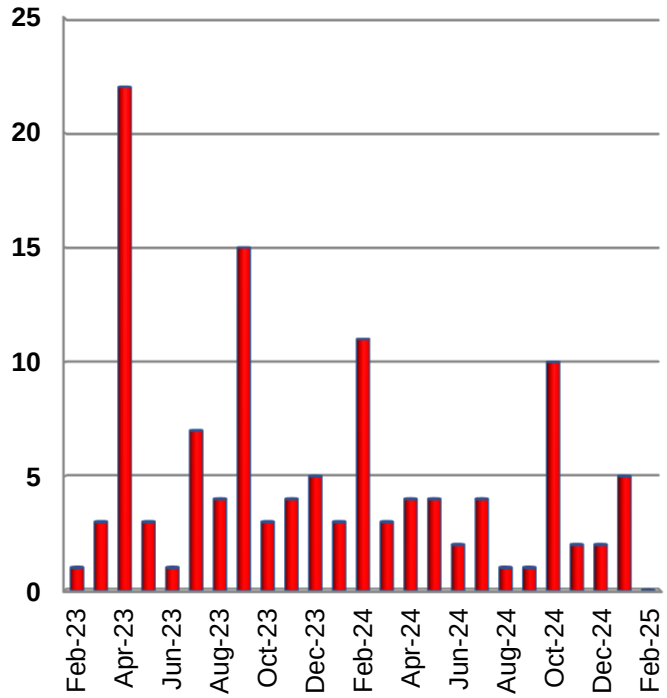
Building Plan Review Statistics

New Construction Building Permits Issued by Month

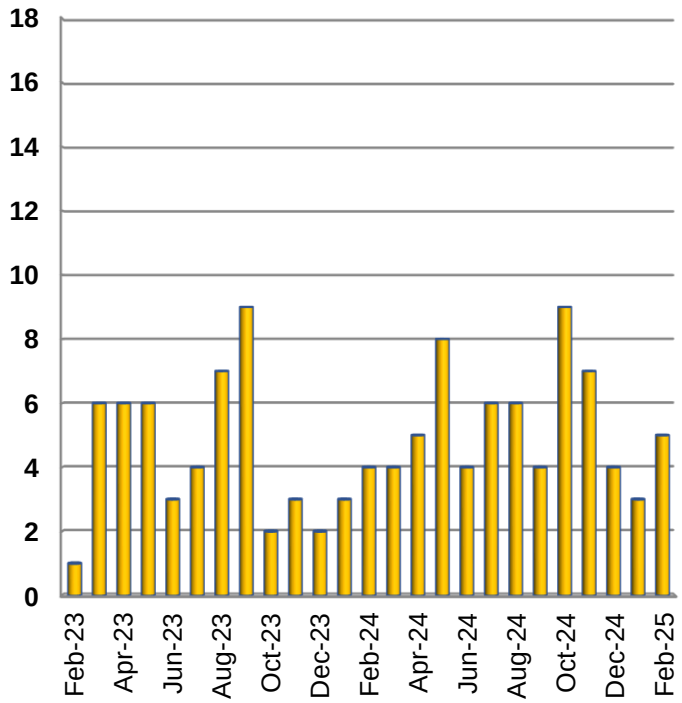


	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25
Commercial	1	6	6	6	3	4	7	9	2	3	2	3	4	4	5	8	4	6	6	4	9	7	4	3	5
Multi-family	1	3	22	3	1	7	4	15	3	4	5	3	11	3	4	4	2	4	1	1	10	2	2	5	0
1&2 Family	211	246	168	243	221	234	258	240	245	165	183	185	252	174	191	267	188	197	163	132	184	134	181	218	187

New Multi-family Building Permits Issued by Month

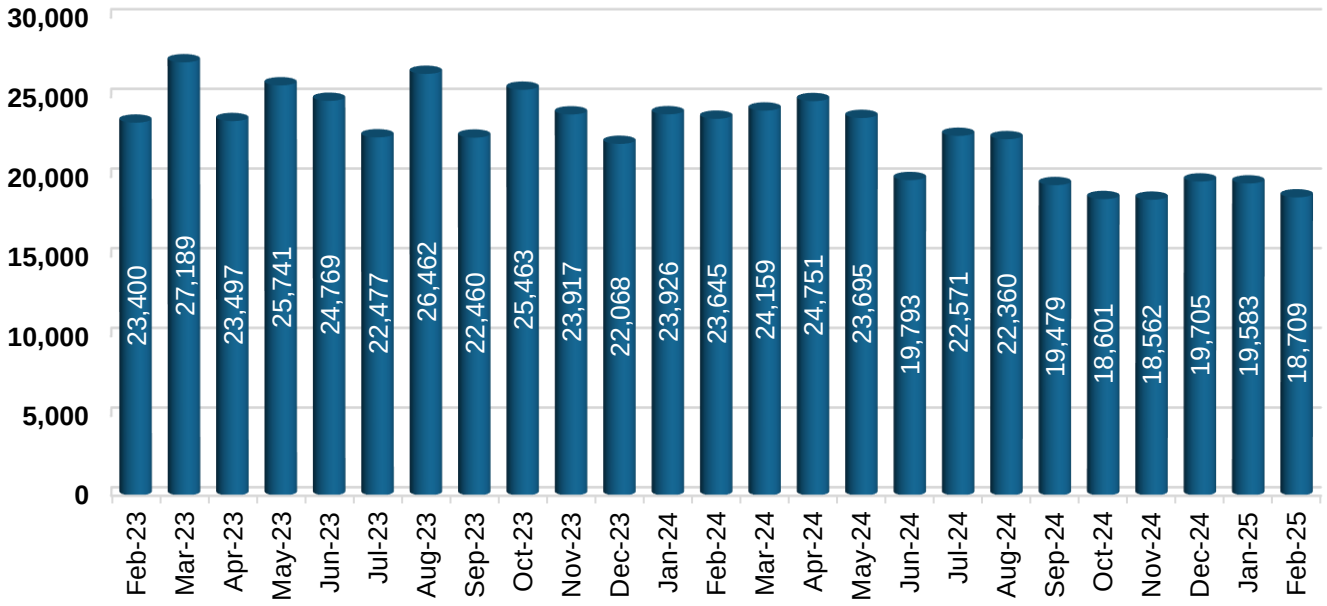


New Commercial Building Permits Issued by Month

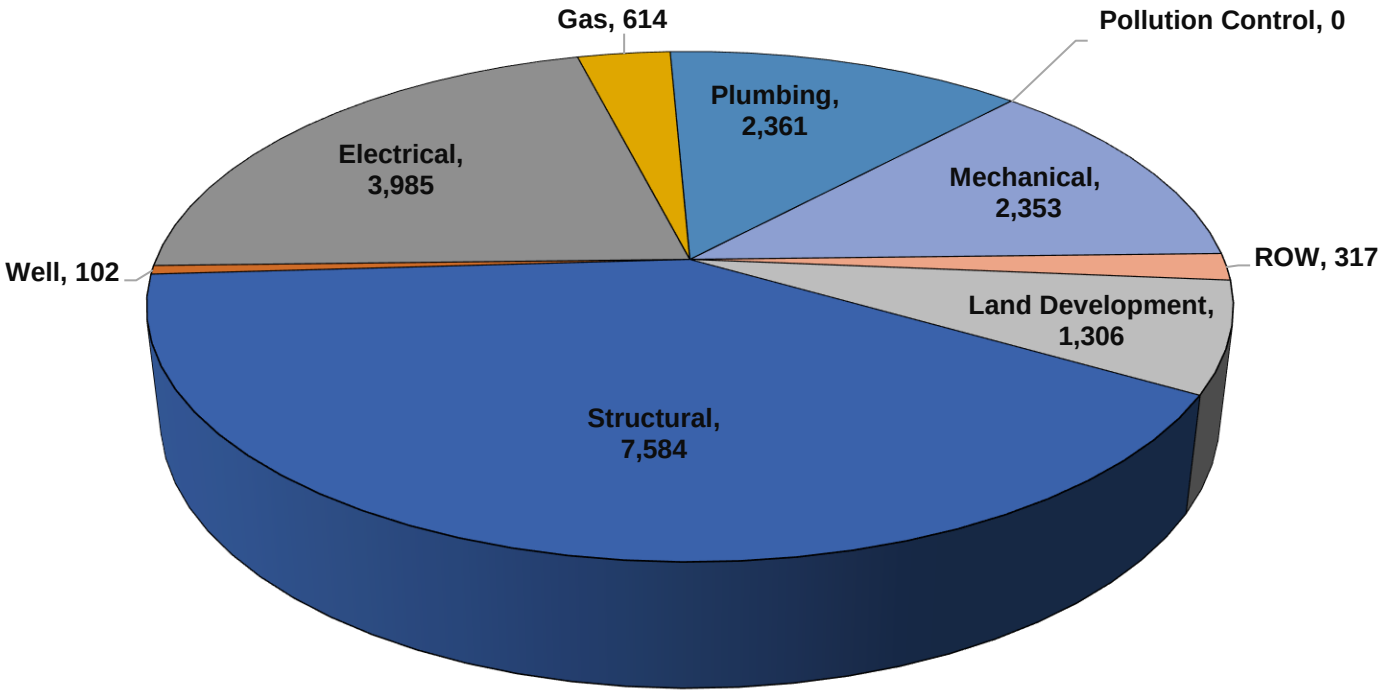


Building Inspections Statistics

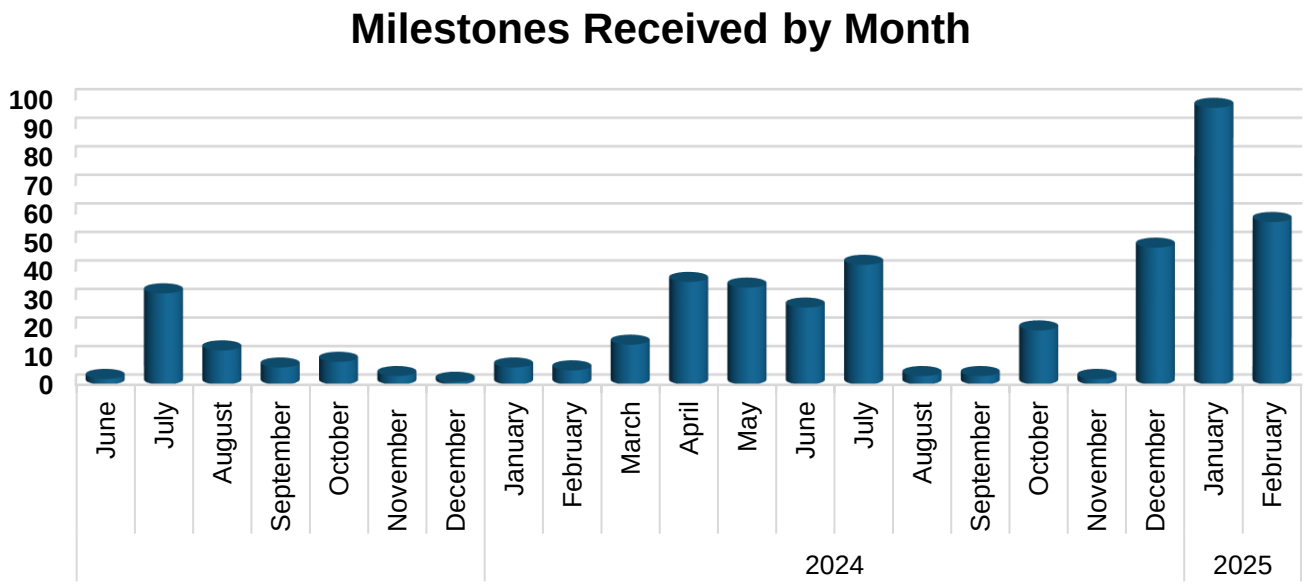
Building Inspections

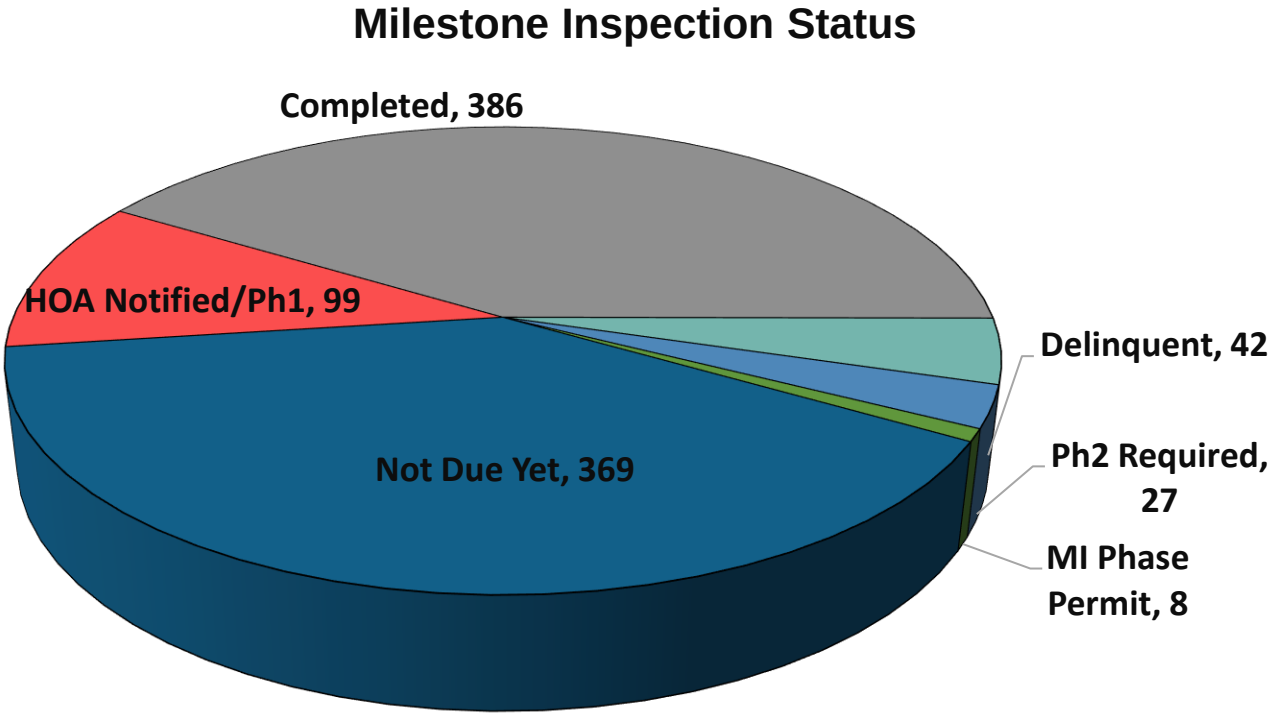


Types of Building Inspections



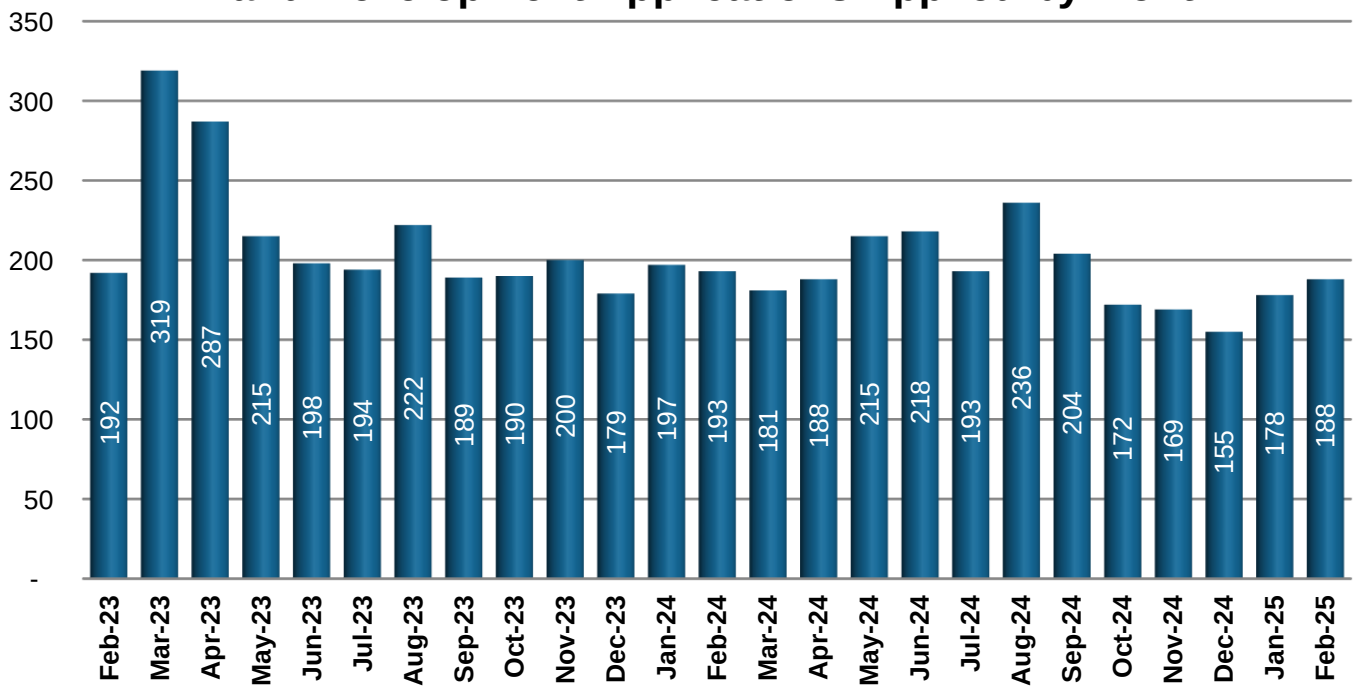
Building Inspections Statistics



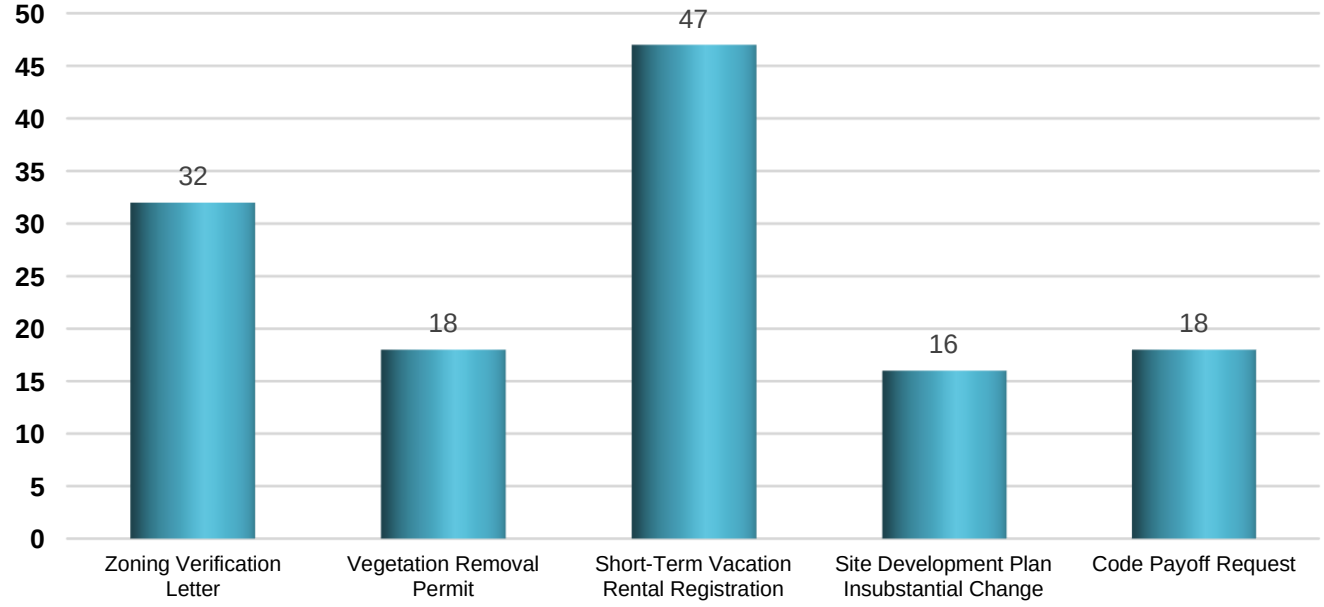


Land Development Services Statistics

All Land Development Applications Applied by Month

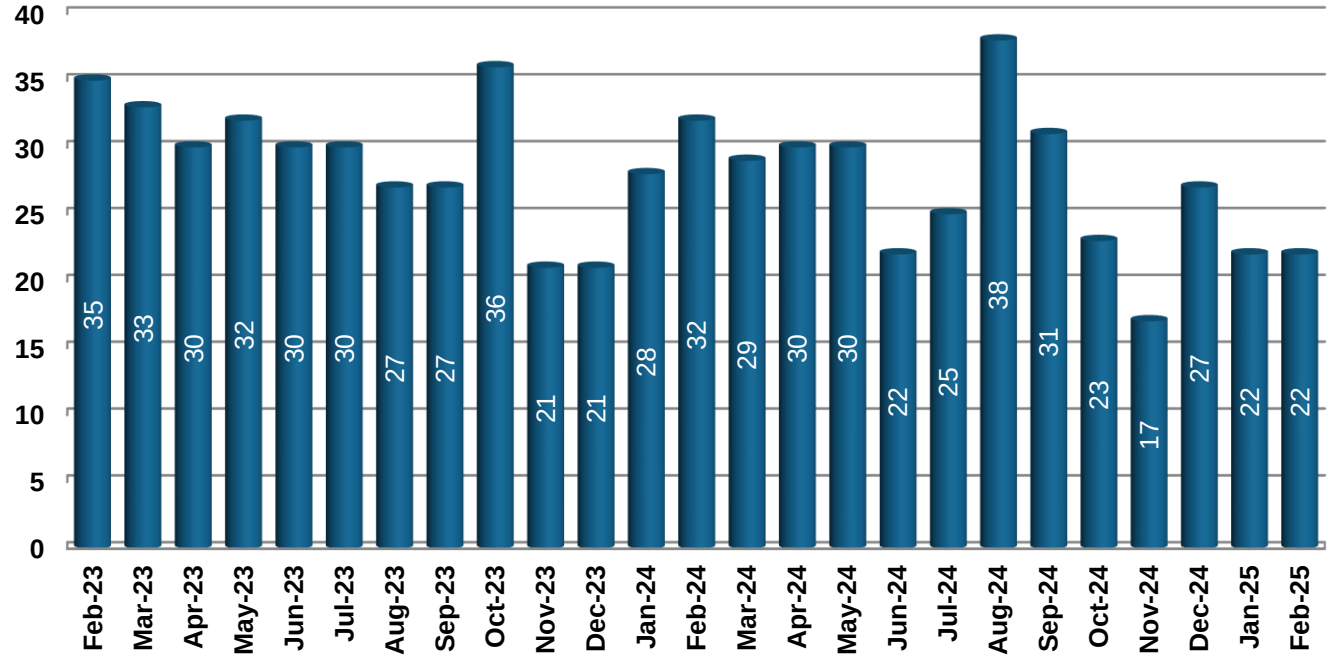


Top 5 Land Development Applications Applied within the Last 6 Months

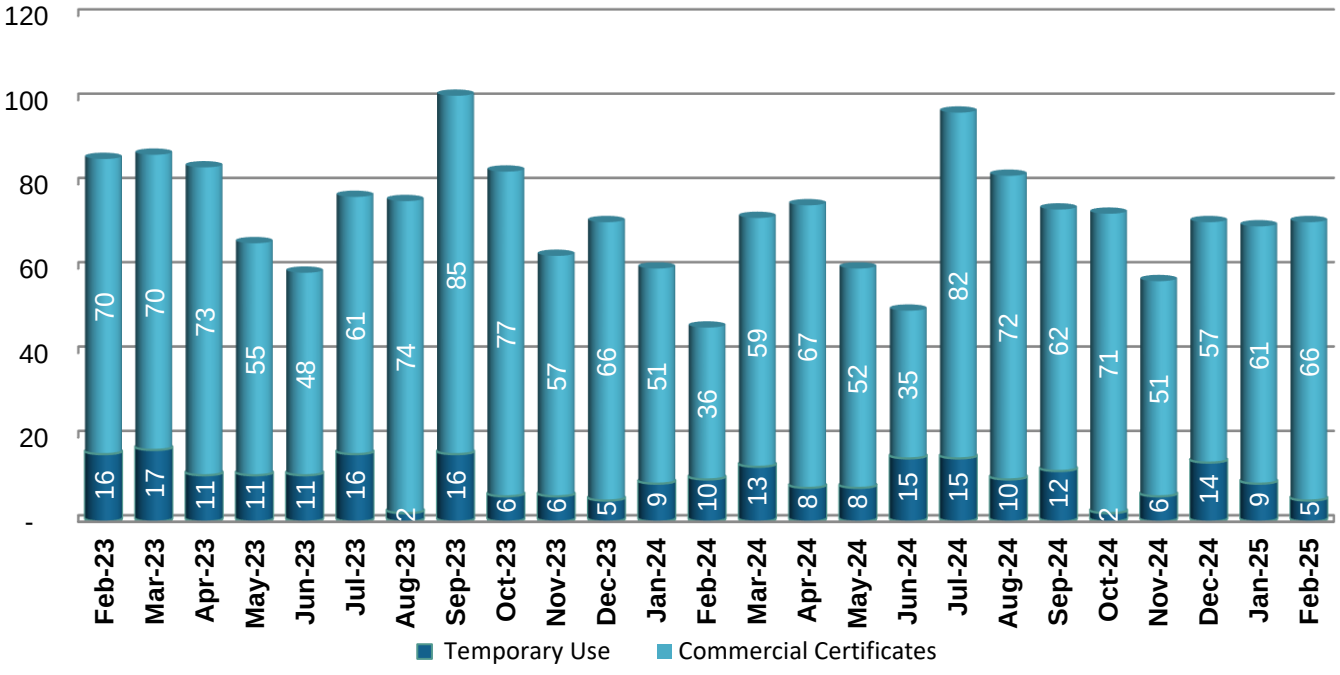


Land Development Services Statistics

Pre-application Meetings by Month

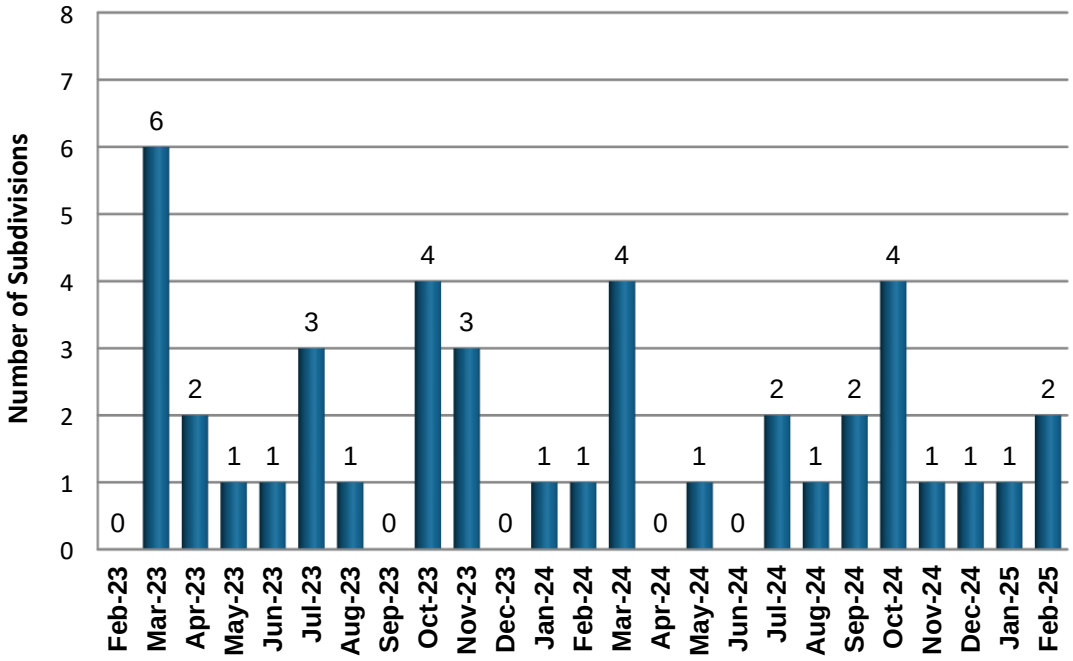


Front Zoning Counter Permits Applied by Month



Land Development Services Statistics

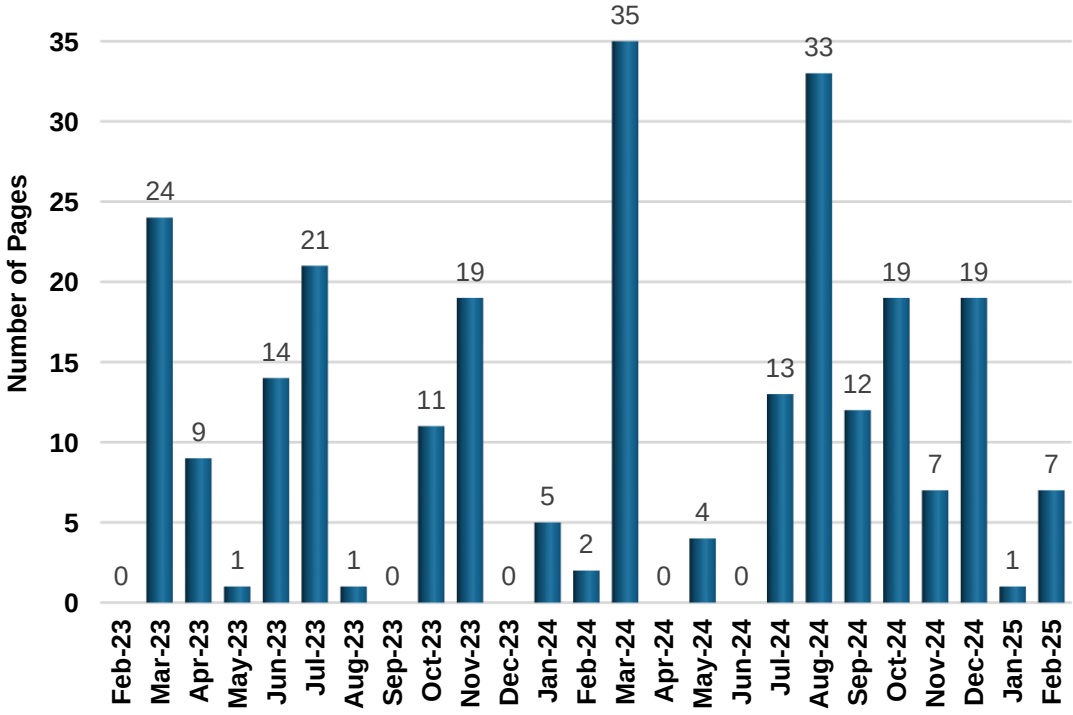
Number of New Subdivisions Recorded per Month



Yearly Totals Subdivisions
2020 – 25
2021 – 33
2022 – 29
2023 – 21
2024 – 18
2025 – 3

Yearly Totals Lots
2021 – 1353
2022 – 3100
2023 – 1212
2024 – 1559
2025 – 326

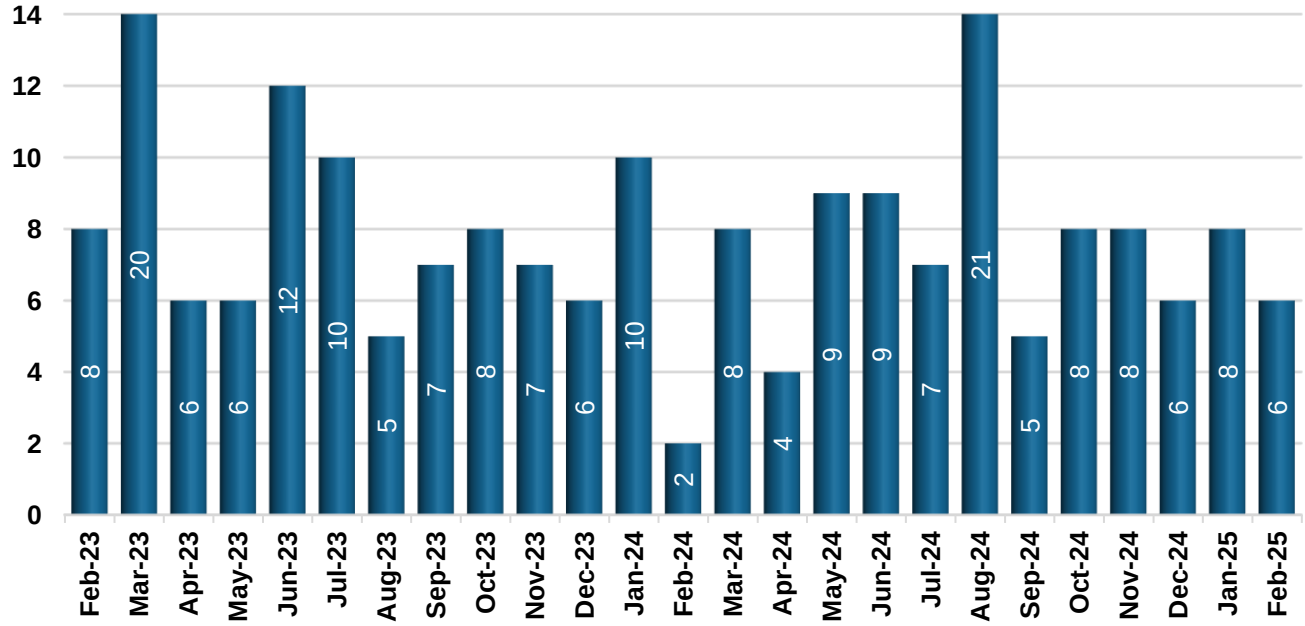
Plat Pages Recorded per Month



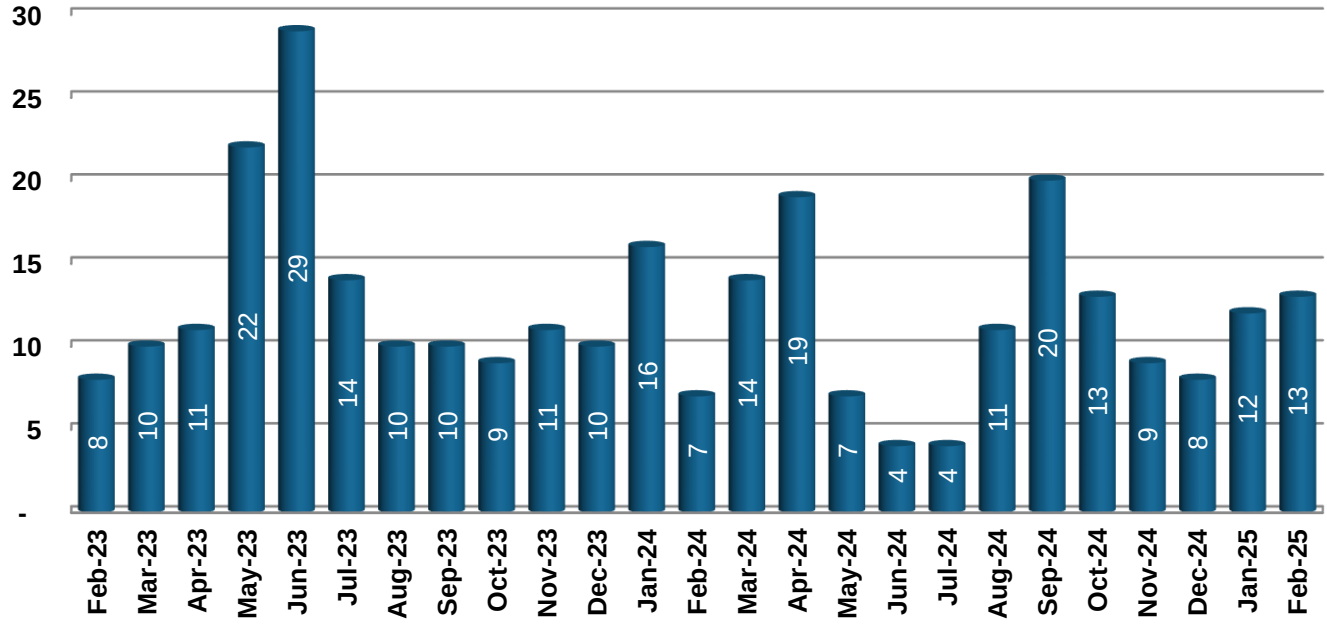
Yearly Totals Pages
2020 – 152
2021 – 188
2022 – 175
2023 – 100
2024 – 154
2025 – 10

Land Development Services Statistics

Monthly Total of Subdivision Applications (PSPA, PSP, PPL, PPLA, ICP, FP, CNST) by Month

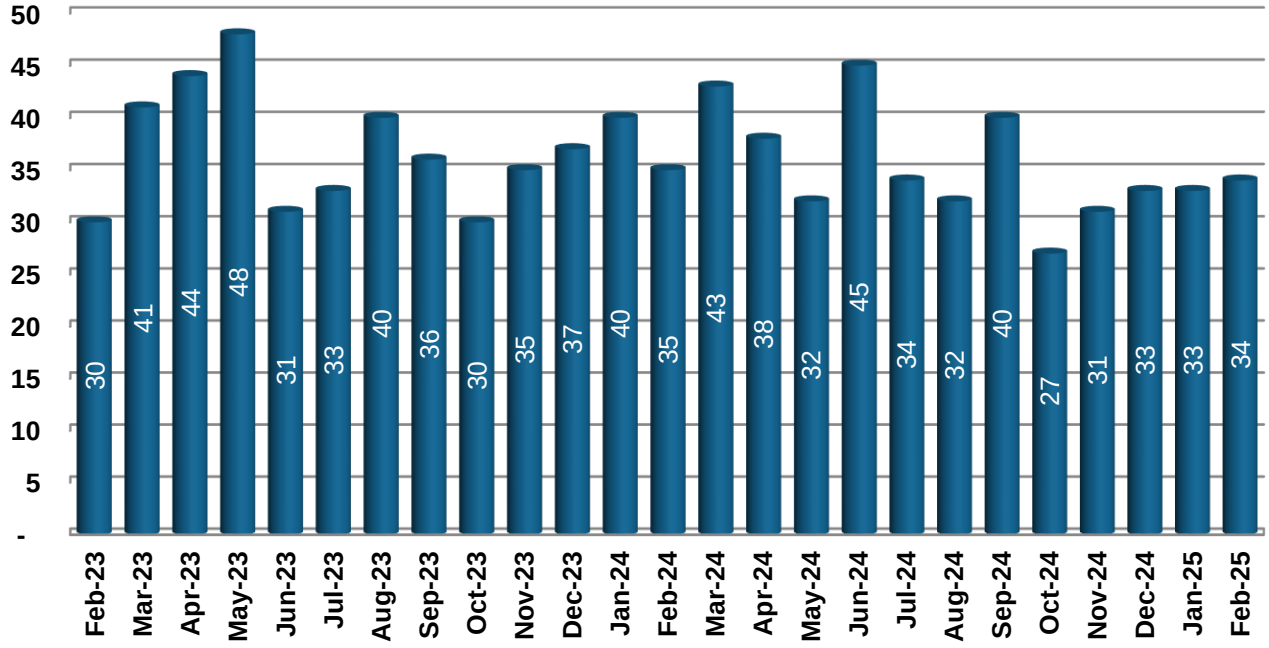


Monthly Total of Subdivision Re-submittals/Corrections (PSPA, PSP, PPL, PPLA, ICP, FP, CNST) by Month

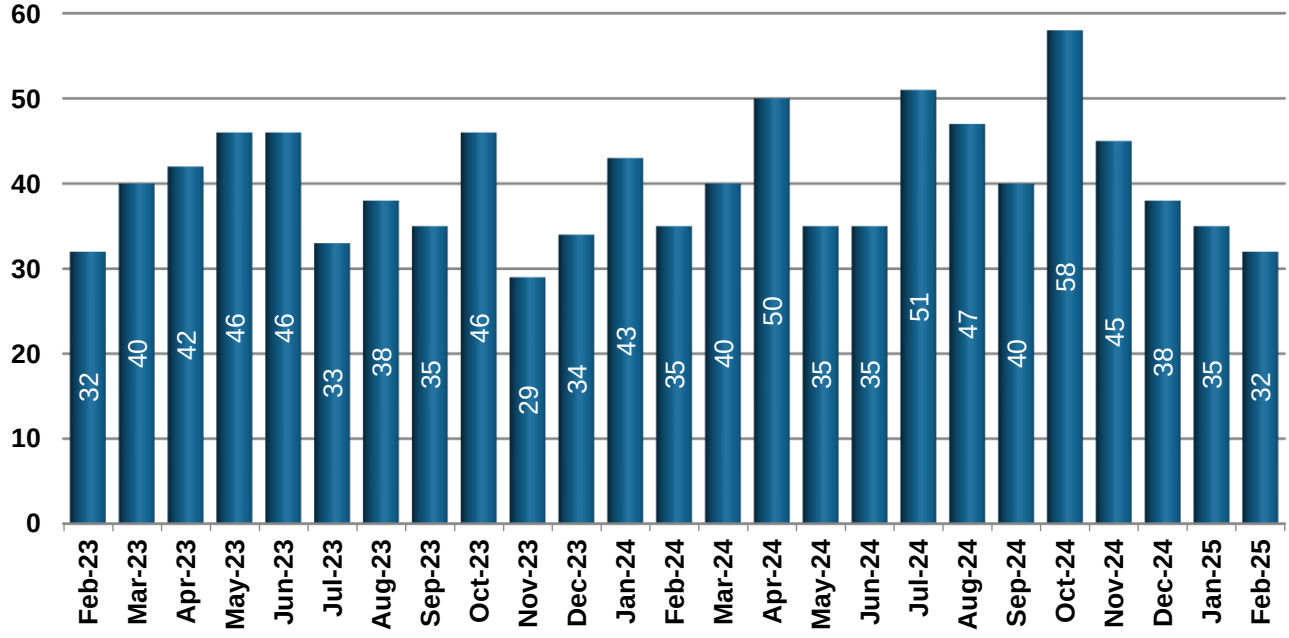


Land Development Services Statistics

Monthly Total of Site Plan Applications (SIP, SIPI, SDP, SDPA, SDPI, NAP) by Month

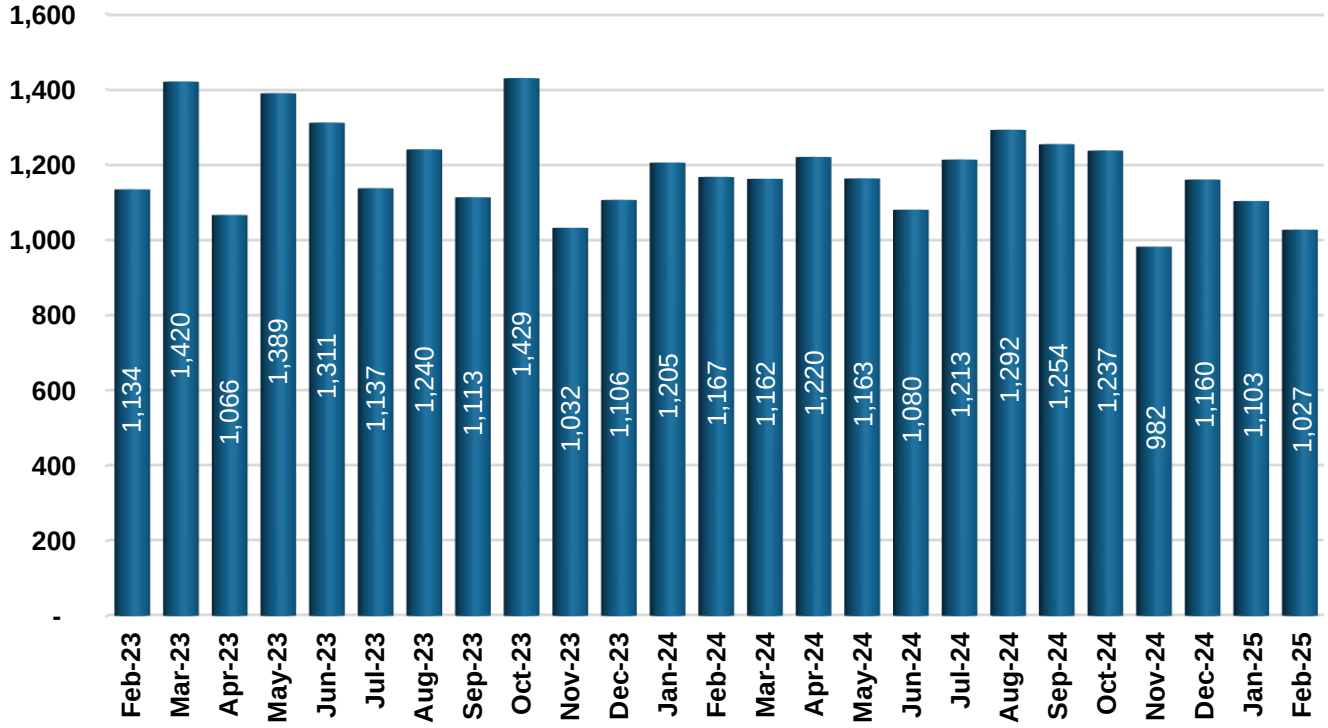


Monthly Total of Site Plan Re-submittals/Corrections (SIP, SIPI, SDP, SDPA, SDPI, NAP) by Month

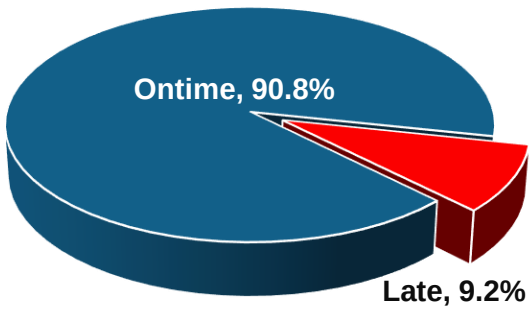


Reviews for Land Development Services

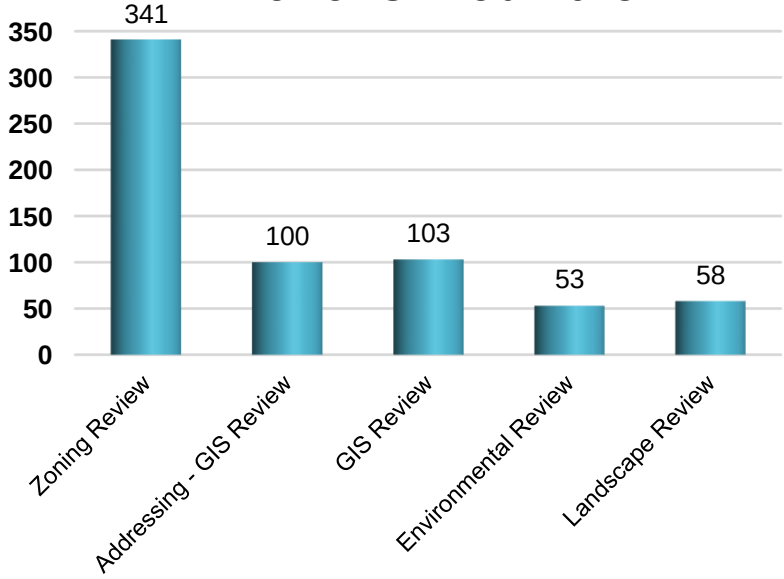
Number of Land Development Reviews



Percent Ontime for the Month

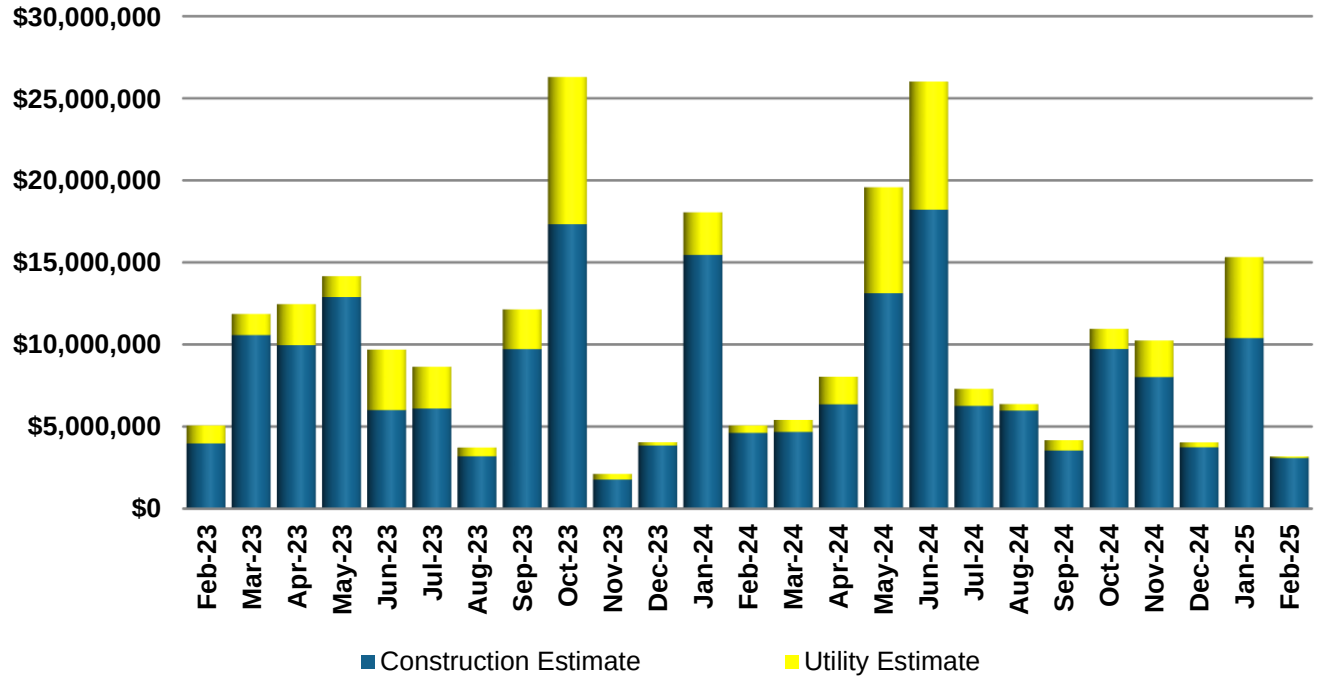


Top 5 Land Development Reviews - Feb. 2025

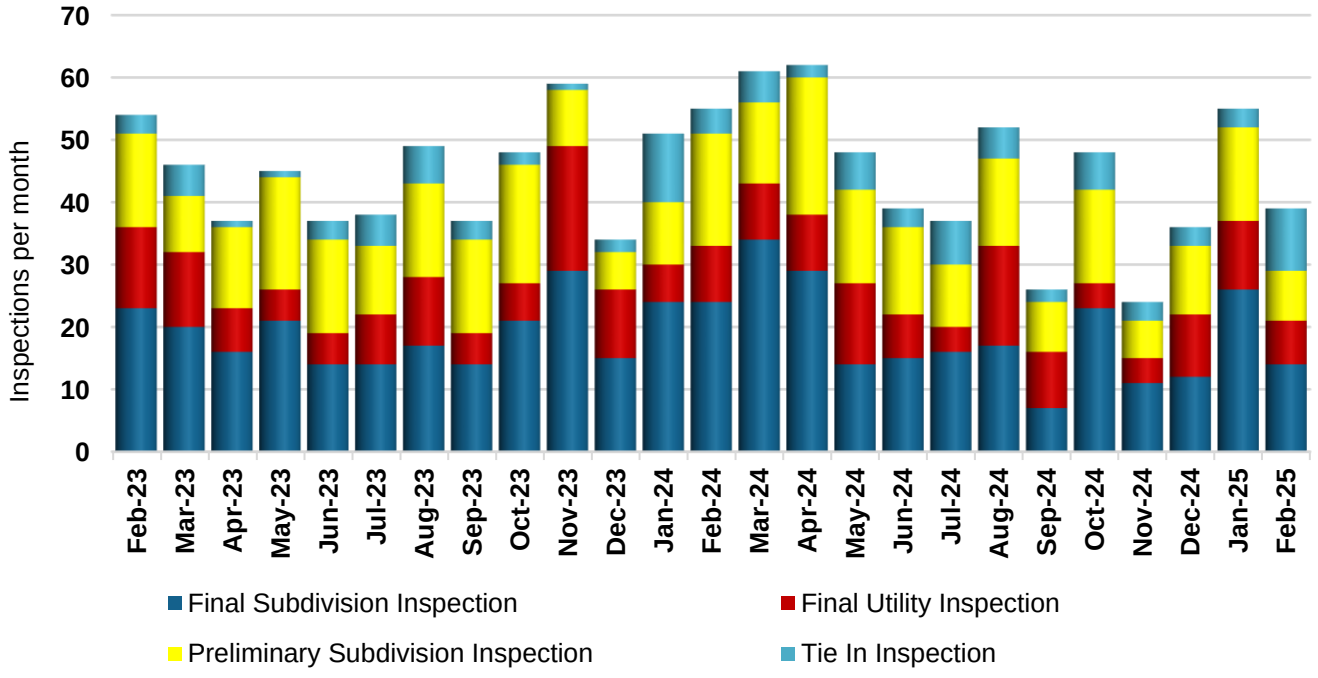


Land Development Services Statistics

Total Applied Construction Valuation Estimate

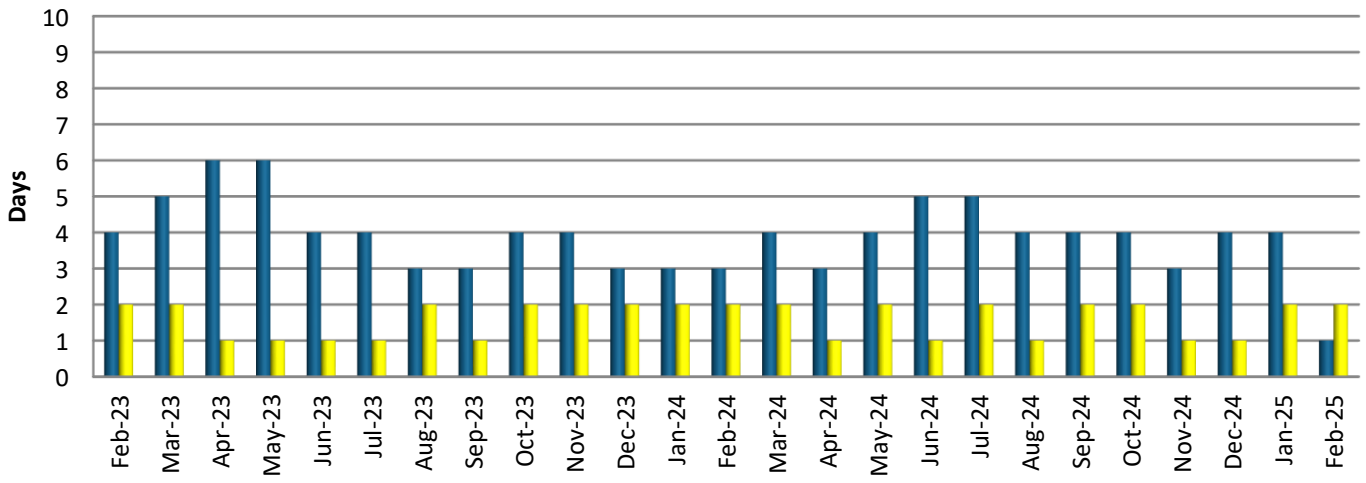


Site & Utility Inspections



Fire Review Statistics

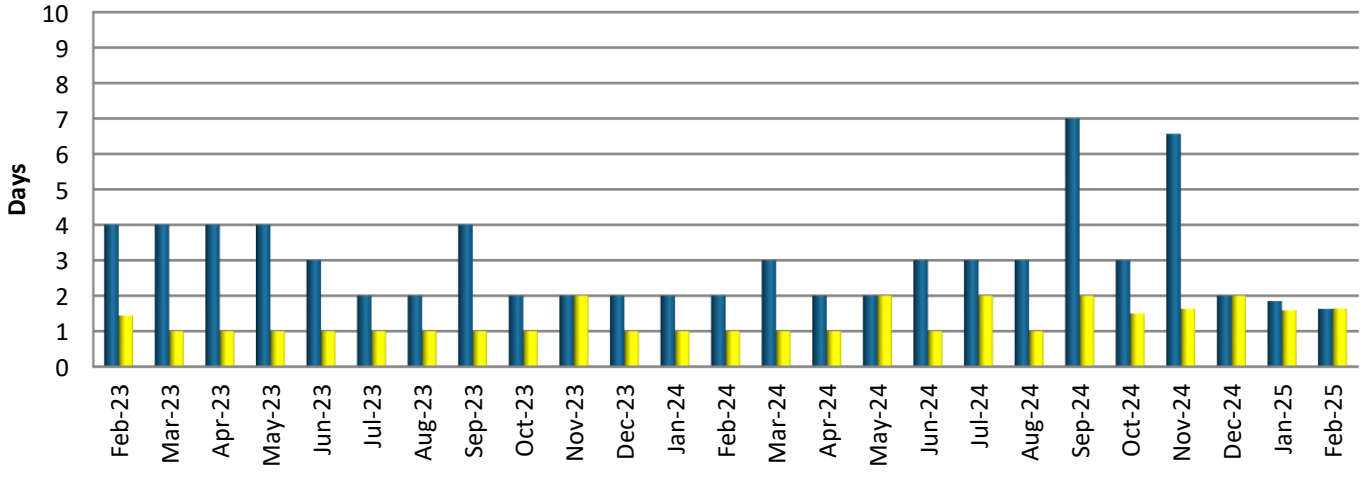
Building Fire Review Average Number of Days



Total Number of Building Fire Reviews by Month

Fire District	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25
North Collier	444	450	583	490	692	650	627	636	525	616	543	411	459	406	508	581	684	634	647	646	733	655	459	481	588
Collier County (Greater Naples)	347	448	539	408	500	447	391	428	397	442	395	403	382	429	425	552	517	511	482	407	464	447	390	432	459

Planning Fire Review Average Number of Days



Total Number of Planning Fire Reviews by Month

Fire District	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25
North Collier	28	46	25	47	56	54	50	37	52	48	57	60	57	37	44	40	43	51	51	62	63	47	46	55	65
Collier County(Greater Naples)	68	70	63	82	91	43	43	60	62	50	39	56	53	60	75	61	55	68	67	64	48	64	58	44	95

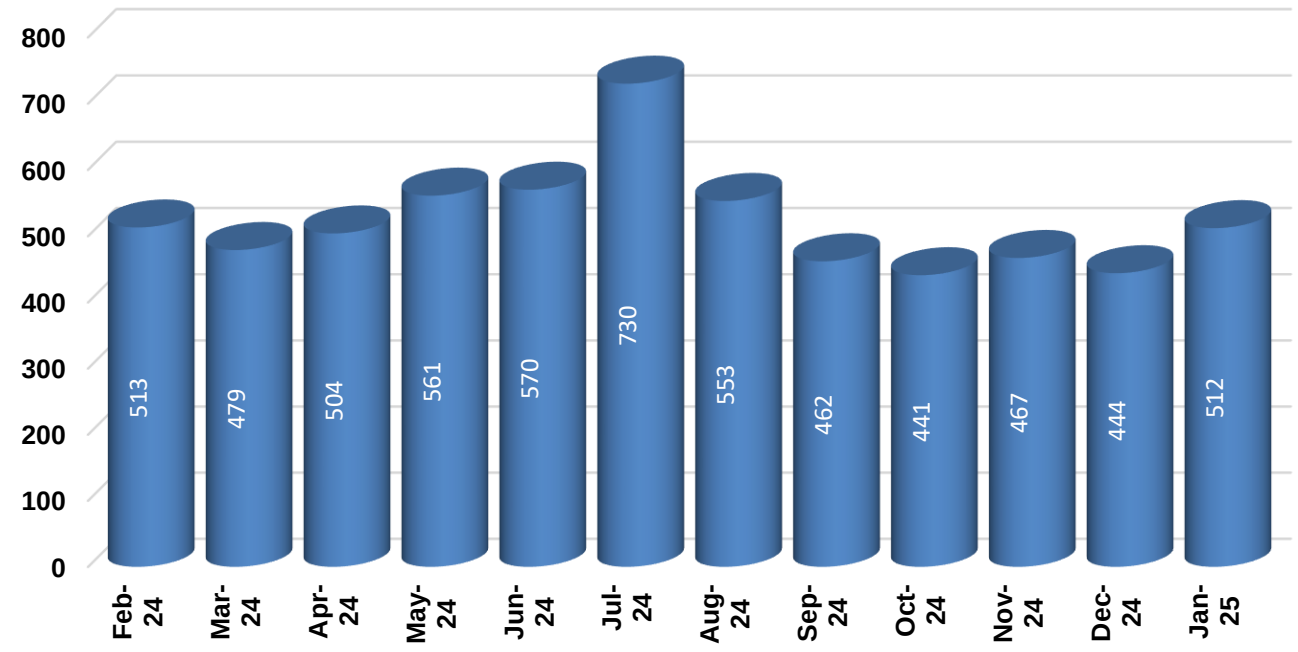
Collier County

February 2025 Code Enforcement Monthly Statistics

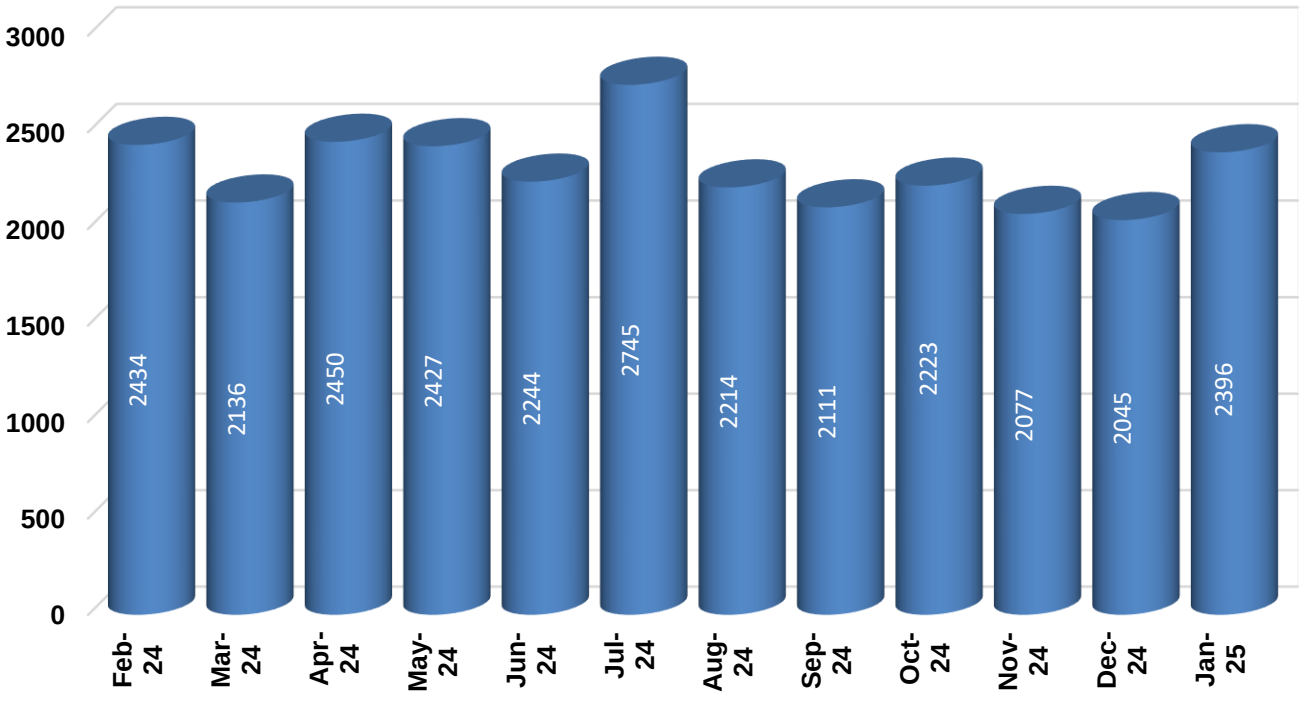


Code Enforcement Reports

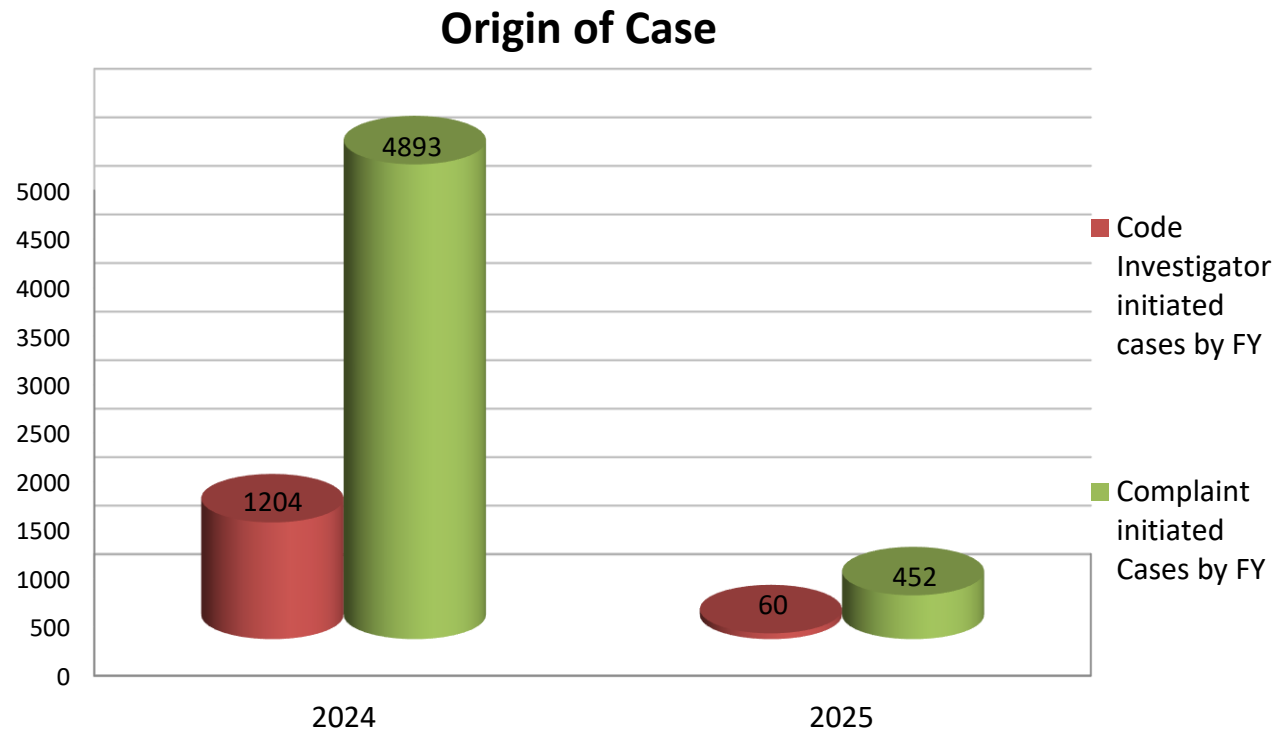
Cases Opened Per Month

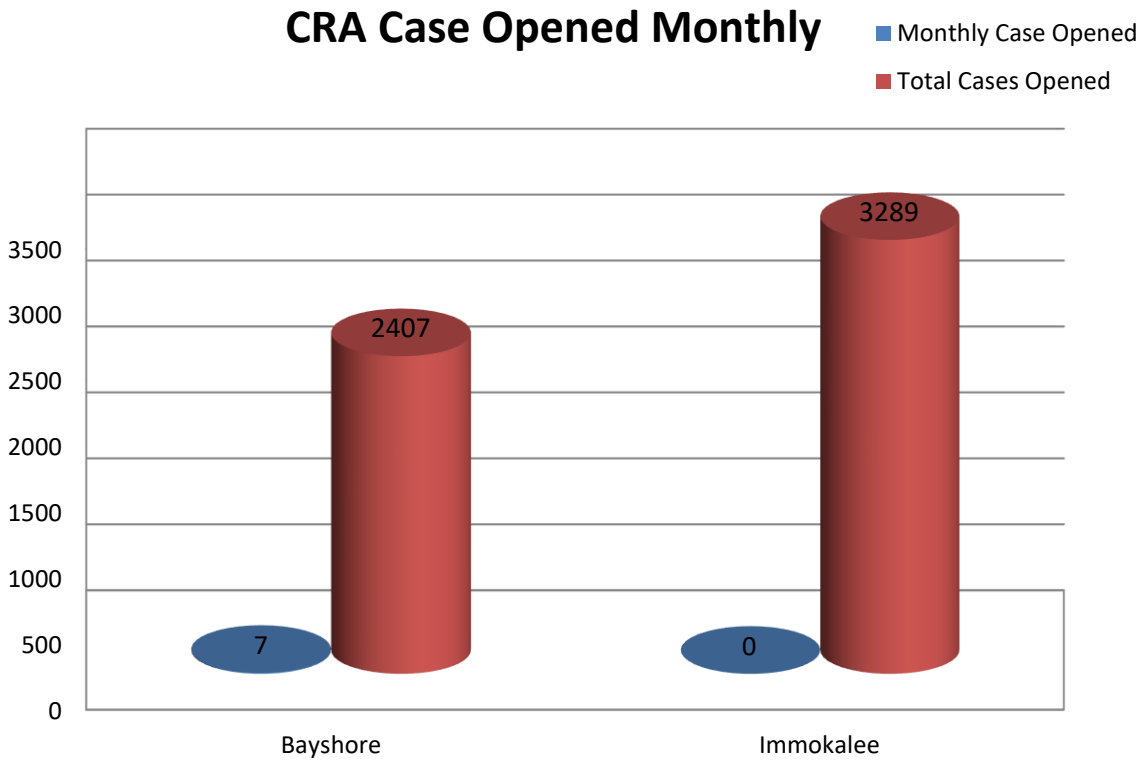


Code Inspections Per Month



Code Enforcement Reports



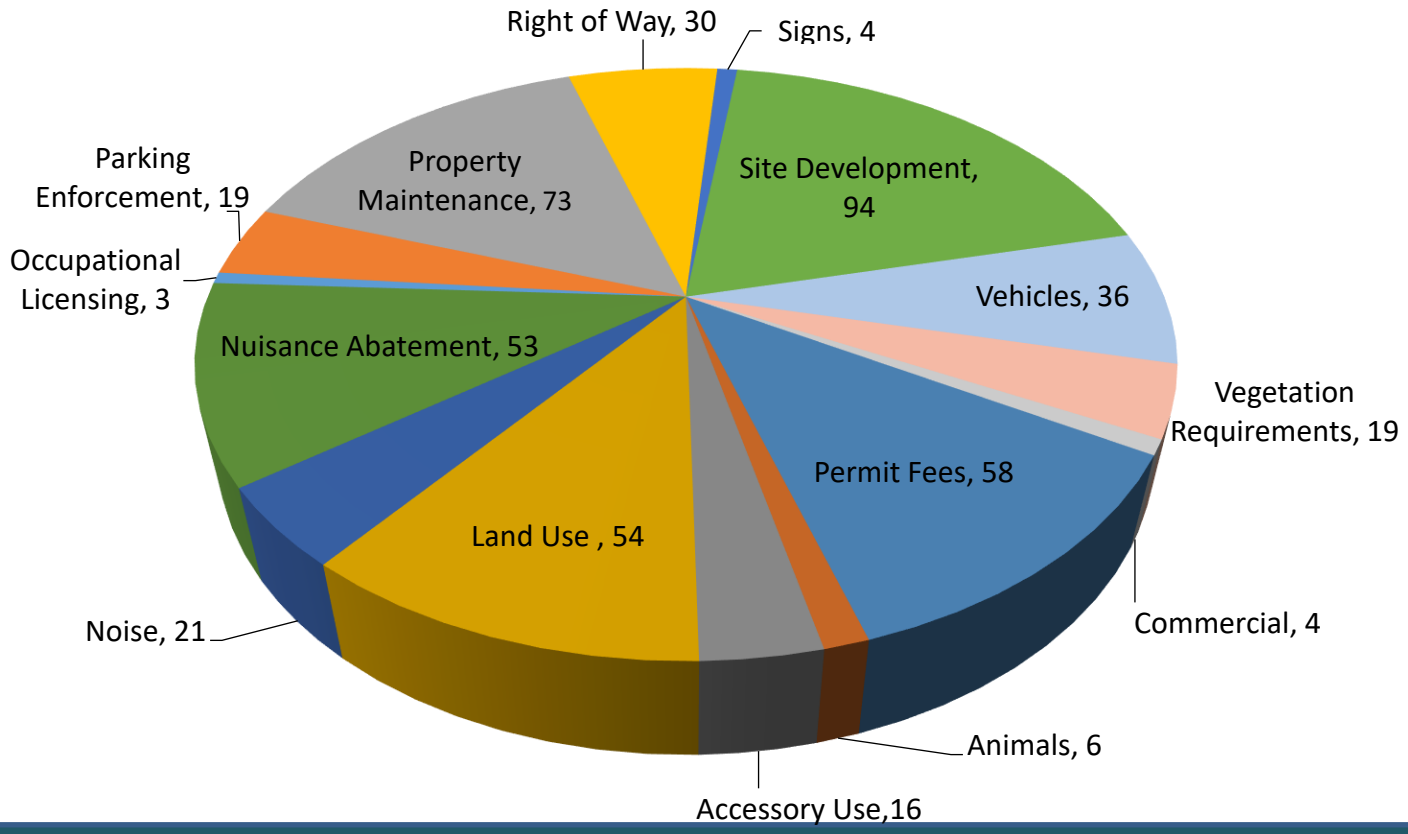


Code Enforcement Reports

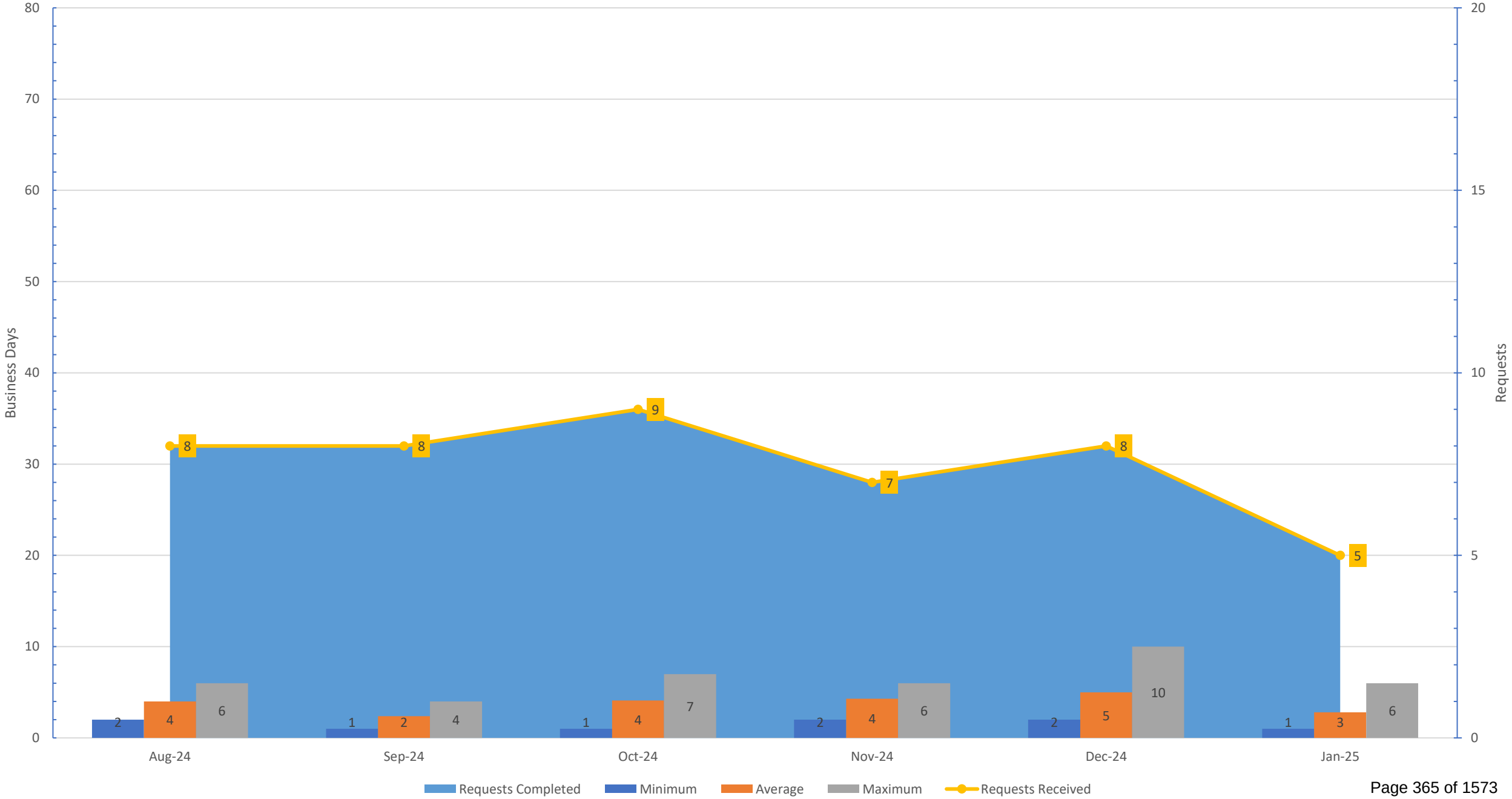
January 22, 2025 – February 20, 2025 Highlights

- Cases opened: 512
- Cases closed due to voluntary compliance: 277
- Property inspections: 2396
- Lien searches requested: 802

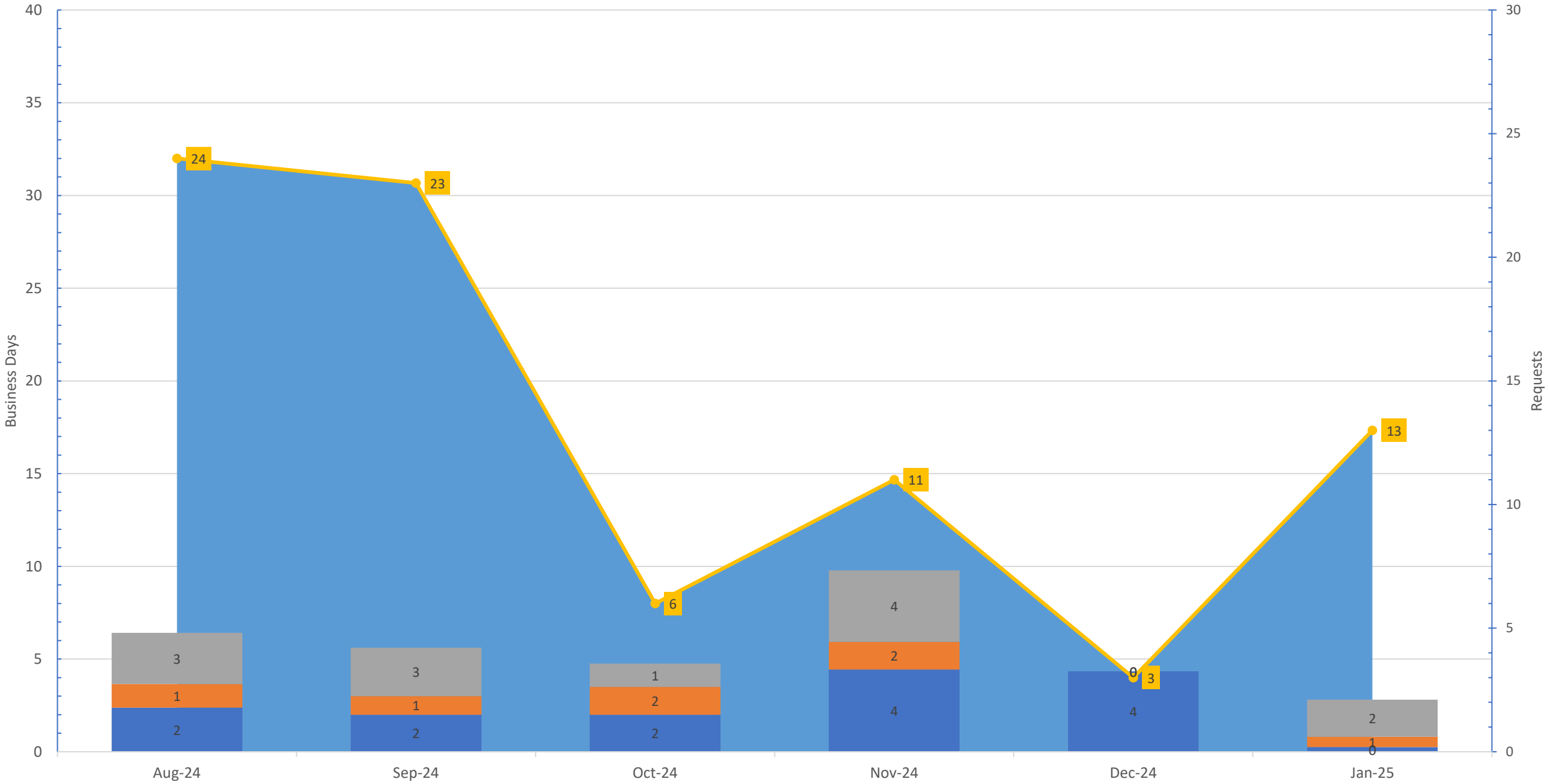
Top 15 Code Cases by Category



Response Time - Letters of Availability



Response Time - FDEP Permits



E.2. Insubstantial Change to Construction Plans (ICP)

Reference **LDC** sections 10.02.04 B.5 and 10.02.05 A.5

Applicability Approved construction plans may request minor or insubstantial changes due to site inspections and/or unexpected conditions that warrant changes to the plans. All changes must be noted on the record drawings.

No changes to the final subdivision plat are permitted.

Pre-application A pre-application meeting is required unless waived by the County Manager or designee.

Initiation The **applicant** files an "*Application for Insubstantial Change to Construction Plans*" with the Development Review Division.

⇔*See Chapter 1 D. for additional information regarding the procedural steps for initiating an application.*

Application Contents Submittal Credentials: Construction plans for all of the improvements required shall be signed and sealed by the **applicant's** professional **engineer** licensed to practice in the State of Florida.

Sheet size: The construction plans shall be submitted on standard size 24-inch by 36-inch sheets, drawn to scale.

The application must include the following:

1. **Applicant contact information.**
2. **Addressing checklist**.
3. Project information, including:
    a. Assigned **Planner**;
    b. Project name;
    c. Original CNSTR/PPL number; and
    d. Section, township and range.
4. Determination (i.e. email correspondence) from the County Manager or designee that confirms the proposed revisions to PPL or CNSTR, are consistent with the insubstantial change criteria; and
5. Cover letter describing in detail the requested changes and identification of the sheet number and the plans affected by the requested change. The cover sheet shall be signed and sealed and include the following information:
    a. Project Title;

Attendance Roster – Date: March 05, 2025

Development Services Advisory Committee

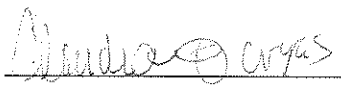
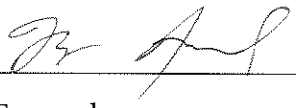
Must have (8) members for a quorum

Committee Members	
James Boughton:	**Norman Gentry:** Present
Clay Brooker: Excused	**Mark McLean:**
Jeffrey Curl:	**Chris Mitchell:**
Laura Spurgeon DeJohn:	**Robert Mulhere:**
Nicholas Kouloheras:	**Jeremy Sterk:**
John English:	**Mario Valle:**
Marco Espinar: Present	**William Varian:**
Blair Foley:	**Hannah Roberts:**

Attendance Roster – Date: March 05, 2025

Development Services Advisory Committee

Staff Members

James French Department Head, GMCDD	Present
Michael Bosi Director, Planning & Zoning	Present
Christopher Mason Director, Community Planning & Resiliency	Excused
Cormac Giblin Director, Housing Policy and Economic Development	Present
Jaime Cook Director, Development Review	Present
Michael Stark Director, Operation & Regulatory Support	Present
John McCormick Director, Building Review & Permitting	Present
Thomas Iandirmarino Director, Code Enforcement	Present
Matt McLean or designee Director, Public Utilities	
Jay Ahmad or designee Director, Transportation Engineering	
Diane Lynch, Management Analyst II Staff Liaison, Operations & Regulatory Management	Excused
Heather Cartwright-Yilmaz, Management Analyst I Staff Liaison, Operations & Regulatory Management	Present

Other County Staff Presenting NOT listed above.

Name	Signature

Attendance Roster – Date: March 05, 2025

Development Services Advisory Committee

Public Sign-in Sheet

Please Print

NAME	REPRESENTING	PHONE NO.
None		

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

February 14, 2025

FOR IMMEDIATE RELEASE

Notice of Public Meeting
Development Services Advisory Committee
Collier County, Florida

March 05, 2025
3:00 p.m.

ATTENTION: MEETING LOCATION CHANGE

Notice is hereby given that the **Collier County Development Services Advisory Committee** will meet on **Wednesday, March 05, 2025,** at **3:00 p.m.** in the Exhibit Hall of the North Collier Regional Park Administrative building, 15000 Livingston Road, Naples, Florida.

Individuals who would like to participate in person must complete and submit a speaker form prior to the beginning of the discussion about the item.

About the public meeting:
Two or more members of the Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future Board of County Commissioners meeting.

All interested parties are invited to attend and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations in order to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380 as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Heather Cartwright-Yilmaz at (239) 252-8369.

###

MINUTES OF THE COLLIER COUNTY
DEVELOPMENT SERVICES ADVISORY COMMITTEE MEETING

Naples, Florida
February 05, 2025

LET IT BE REMEMBERED, the Collier County Development Services Advisory Committee Meeting and Collier County, having conducted business herein, met on this date at 3:00 PM in REGULAR SESSION at the Collier County Growth Management Community Department Building, Conference Room #609/610, 2800 N. Horseshoe Dr., Naples, Florida, 34102 with the following members present:

Chairman:	William J. Varian
Vice Chairman:	Blair Foley
	Clay Booker
	James Boughton
	Jeffrey Curl
	Laura Spurgeon DeJohn
	John English
	Marco Espinar
	Norm Gentry
	Nicholas Kouloheras
	Mark McLean
	Chris Mitchell
	Robert Mulhere
	Hannah Roberts – AHAC – Non-Voting
	Jeremy Sterk
	Mario Valle

The following County staff were in attendance
Mike Bosi – Director, Zoning Division
Christopher Mason – Director, Community Planning & Resiliency Division, GMCD
Jaime Cook – Director, Development Review Division, GMCD (Excused)
Michael Stark – Director, Operations & Regulatory Management Division, GMCD
John McCormick – Director, Building Review & Permitting Division, GMCD
Michael Cruz – Captain, Collier County Fire Review
Bryan Horbal – Captain, North Collier Fire Review
Thomas Iandimarino – Director, Code Enforcement, GMCD
Claudia Vargas – Project Manager I, Engineering & Project Management, PUD
Mark Sawyer – Project Manager II, Transportation Planning – Transportation Engineering
Heather Yilmaz – Management Analyst, Staff Liaison - GMCD

Any person who decides to appeal a decision of This Board you will need a record of the proceedings pertaining thereto, and therefore may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based, Neither Collier County nor This Board shall be responsible for providing this record.

1. **CALL TO ORDER– Chairman**
   Chairman Varian
   Development Service Advisory Committee, Wednesday, 5th February 2025

2. **APPROVAL OF AGENDA**
   Motion made to approve and seconded
   Agenda approved unanimously

3. **APPROVAL OF MINUTES**
   a. DSAC Utility Subcommittee: October 29, 2024
   b. DSAC Utility Subcommittee: November 18, 2024
   c. DSAC: December 04, 2024
      Motion made to approve Meeting Minutes and seconded
      Minutes approved unanimously

4. **SELECTION OF COMMITTEE CHAIR AND VICE CHAIR**
   There was a motion to re-elect William Varian as Chairman
   Motion was seconded
   Motion passed

   There was a motion to re-elect Blair Foley as Vice Chair
   Motion was seconded
   Motion passed

5. **PUBLIC SPEAKERS**
   None

6. **STAFF ANNOUNCEMENTS**
   a. **Zoning Division – [Mike Bosi, Director]**
      - We discussed last week interviewing for a plaintiff reposition to offer a position. Still haven't been able to hire a planning comp planning manager. It's just been difficult. We continue to do what we can from a land entitlement standpoint.
      - We really haven't dropped off much. And I think what you're gonna hear when Mr. Stark comes up, talk about a little bit of the trailing off the, the trends within our building permits.
      - In terms of entitlement, we haven't seen a real decrease within the request. I'm still taking a number of growth management plan PD amendments for related to affordable housing projects. We keep adding at least modestly to the, to the supply. The rest of the entitlements continue on pretty strong.

- We've got a pretty busy February and March from the Planning Commission and Board of County Commissioners. We get a little slow down in summertime in terms of when we're allowed to take land lease petitions.

Clay Booker
Have you heard anything about Senate Bill 250 being extended?

Mike Bosi
Right now, it's till October 1st, 2026, and we wouldn't be surprised if the legislator takes another crack and sends it for another year or two.
I have heard there's been some discussion with Senator PA about potentially having the legislator weigh in on whether they believe PD should be eligible for the local and that would be something that would have an effect upon the County. So much of our zoning, so much of our commercial and industrial land is within the PD. So that's another thing we'll be paying attention to from the legislation.

b. Community Planning & Resiliency Division – [Christopher Mason, Director]

- We are working on a number of studies. We also have our CRS commitment for our tri-annual verification visit which is part of our FEMA commitment to reduce flood insurance premiums.
  The Coastal Storm Risk Management Feasibility Study has been paused.

Mark McLean
There are 2 companies that are installing floodgates without insurance or permits.

Christopher Mason
There has been dry flood proofing done, not tiger dams. This is only allowed for commercial buildings.

c. Economic Development & Housing Division – [Cormac Giblin, Director]

- The Board approved 90 more new additional affordable housing units as part of a development called the Tammy Mutual Greenway PUD. That brings our total fiscal year to date of approval is up to 420. And on the economic development, job creation front, this fiscal year to date, we've created 70 new high wage paying targeted industry jobs.
- The Board last week approved a new agreement with a Company called Arbor X for 14 more new additional jobs that'll be created over the next four years.

d. Development Review Division – [Jaime Cook, Director] Excused
No Report

e. Operations & Regulatory Mgmt. Division – [Michael Stark, Director]

- We received 4,143 permit applications
- 84 of the permits were related to Hurricane Helene
- 50 of these were from Hurricane Milton

- Average turnaround time for the intake staff remains at one day
- Zoning front desk team processed 936 survey conditions
- 13 short term vacation rentals
- 46 right of way renewals and hosted 37 pre-application meetings.
- We welcomed 1,367 customers to our business center and satellite offices
- The staff answered 6,075 calls, up from about 4,000
- There are 341 positions department wide and 56 open positions
- Our recruitment search is widespread, but it is a struggle to fill positions

f. Building Review & Permitting Division – [John McCormick, Director]

- 800 to 1000 inspections per day
- 5,000 permits a month
- There is substantial fraud happening from a stolen or misapplied digital seal issued to Gene Cravillion. The password to access his account has affected about 400 permits issued to architects, builders, designers in all types of buildings. It has been fraudulent since August 2022
- As a Director, it's my responsibility to keep this from happening again
- We are down 5 structural reviewers, and our pay scale is way under what candidates are expecting
- There is also turnover of employees that we use part time, and the turnover of temporary employees averages about 200%

g. Collier County Fire Review – [Michael Cruz, Captain]

- Active is going well at the end of that calendar year. We had a good year as a calendar year. I think productivity projects going out and so forth like that. Inspections are still on a two-day turnaround time for new construction. It's very active in our district. We hired two INS in the past 2 months, kind of like the of opposite what you've been hearing.
- They're working through the training process and this year we're probably looking at possibly hiring another two. We're gonna keep on broadening our base to meet the expectations of the contractors and to the public for the existing side.

h. North Collier Fire Review – [Bryan Horbal, Captain]

- Inspections for December
- 481 for building reviews for new construction
- We had a four-day turnaround on permits
- Planning reviews, a total of 46 with a two-day turnaround with a total of 1,216 new construction inspections.
- January was super busy 588 new construction reviews, building plans, reviews
- That was a four-day turnaround
- Planning reviews were 55 for the month and about a day and a half, two-day turnaround
- We had 1,408 new construction inspections for January

- A couple announcements. Chief Lynch was promoted to assistant chief. Sean is now the assistant chief of life safety and we'll be looking to fill the fire marshal role in his vacancy. Hopefully promoting somebody within.
- We have hired two new plan reviewers for a total of 7.
- We are looking to hire two more fire inspectors in the next budget year with growth and people retiring.
- We've got some retirees coming up probably in the next three or four years.
- Ritz residence is going strong on the corner of Vanderbilt as you can all see the new Publix off Oil Well is going well.
- And Kalea Bay Tower five is cranking now too. Two inspectors but they're looking at maybe four for next budget
- We don't have the same struggles because they're not looking at fire stuff, but they are looking at firewalls and fire barriers.
- We assist the County when it is a proper provider and have a lot of communication with the County inspector.

i. Code Enforcement Division – [Thomas Iandimarino, Director]

- Mr. French announced that the park rangers were coming over to work for code enforcement. We've inherited the park rangers and the enforcement of parking citations
- There is a QR code that is easy to use for paying for parking at Vanderbilt
- For the milestone inspections, once the building official turns those over to us, we open up a code case
- We send them a notice of violation to send to anybody else in code
- They get 30 days to comply
- If they fail to comply, we send them to assign them a hearing
- For Special Magistrate, we already have special magistrate days set aside for those hearings if we need them. It wouldn't take place on the regular office of special management hearing, which is the first Friday.
- We have other days throughout the year that we've had scheduled for other things in case we needed to use them. So, we would assign all of those at one time.

j. Public Utilities Engineering & Project Management Division – [Claudia Vargas, Project Manager]

- The documents presented at the utility subcommittee meeting were from the 2018 version and that did not include the updates approved by the board in 2021. As we bring the utility standard manual to the Board, it will incorporate the 2021 changes. It did not affect any of the changes that were presented at the utility subcommittee.

k. Transportation Management Services, Engineering Division – [Mark Sawyer, Project Manager II]

- A few status updates for you this afternoon. As far as our access management changes, we introduced this a few months ago with you. We met with the traffic engineers on October 4th and then again on November 13th. We went through the

preliminary updates and our findings and how that those adopting the FDOT standards were going to impact our access management.

- We came back on the 13th addressing their concerns. We are now anticipating having the final draft ready to go out next week for them. And that's gonna have all the changes in the edits for all the team members that attended those meetings. We anticipate going to the BCC on April 8th with the final documents.
- Next item is the Golden Gate Parkway study. The corridor study that is from Livingston to I 75. We are going to be having an open house information format public meeting on April 10th at the Golden Gate Community Center that'll be going out to the community.
- And then finally a good news item. We were able to get the 2024 A OIR approved by the board on January 28th. We normally get that done in December.

Blair Foley
Can we get a copy of that final report for the access management recommendations.

Mike Sawyer
It will go out to you when it goes out to the industry.

7. NEW BUSINESS
None

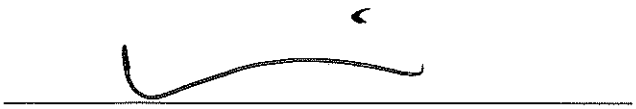
8. OLD BUSINESS
None

9. COMMITTEE MEMBER COMMENTS
Chairman Varian
Our next meeting will be held at the North Collier Regional Park.

10. ADJOURN

There being no further business for the good of the County, the meeting was adjourned at 4:02 p.m.

COLLIER COUNTY
DEVELOPMENT SERVICES ADVISORY COMMITTEE



William Varian, Chairman

These minutes were approved by the Committee/Chairman on 3/5/25,
(check one) as submitted ✓ or as amended _____.

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

January 29, 2025

FOR IMMEDIATE RELEASE

Notice of Public Meeting
Forest Lakes Roadway & Drainage MSTU Advisory Committee
Collier County, Florida

February 4, 2025
10:00 a.m.

Notice is hereby given that the **Forest Lakes Roadway & Drainage Municipal Service Taxing Unit MSTU Advisory Committee** will meet on **Tuesday, February 4, 2025,** at **10:00 a.m.** in the Clubhouse at Forest Lakes, 1058 Forest Lakes Drive, Naples, Florida.

Individuals who would like to participate in person must complete and submit a speaker form prior to the beginning of the discussion about the item.

The agenda will be available on the Collier County Government website at www.collierptne.com/mtsu/forest-lakes-roadway-drainage-advisory-commitee/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Dan Schumacher at (239) 252-5775.

FOREST LAKES

ROADWAY AND DRAINAGE M.S.T.U. ADVISORY COMMITTEE

8300 Radio Road
Naples, FL 34104

AGENDA

February 4, 2025

I. CALL TO ORDER

II. ATTENDANCE

Advisory Committee:

Greg Pollock – Chair (4/21/2026)
Kathy Thomson – Vice Chair (4/21/2027)
Patrick Bernal (4/21/2027)
Marianne Fanning (4/21/2026)
Jerry Norsic (4/21/2028)

County Staff:

Brian Wells – Director, PTNE
Dan Schumacher – MSTU Project Manager

Contractor(s):

Aaron Gross – Ground Zero Landscaping

III. APPROVAL OF AGENDA

IV. APPROVAL OF MINUTES – JANUARY 7, 2025

V. CONTRACTOR REPORTS

A. Ground Zero Landscaping – Aaron Gross

VI. PROJECT MANAGERS REPORT – Dan Schumacher

A. BUDGET REPORT

VII. ONGOING BUSINESS

A. Lake 9 Fountain Replacement
B. Woodshire Paving
C. Woodshire Trees & Palms
D. Shopping Center Screening – Hedge & Fence
E. Lake 15 Wall Replacement

VIII. NEW BUSINESS

A. Quail Run Lakes – Rip-Rap Replenishment

IX. COMMITTEE MEMBER COMMENTS

X. PUBLIC COMMENTS

XI. ADJOURNMENT

NEXT MEETING

MARCH 4TH, 2025 - 10:00 AM
FOREST LAKES CONDO ASSOCIATION CLUBHOUSE
1058 FOREST LAKES DRIVE, NAPLES, FL 34112
(239) 261-5497

FOREST LAKES

ROADWAY AND DRAINAGE M.S.T.U. ADVISORY COMMITTEE

8300 Radio Road - Naples, FL 34104

MINUTES

JANUARY 7, 2025

I. CALL TO ORDER

Chair Pollock called the meeting to order at 10:00 A.M. Roll call was taken, and a quorum of five was present.

II. ATTENDANCE

Advisory Committee	Greg Pollock – Chair
	Kathy Thomson – Vice Chair
	Patrick Bernal
	Marianne Fanning
	Jerry Norsic
Staff	Brian Wells – Director, PTNE (Excused)
	Dan Schumacher – Project Manager
	Rosio Garcia – Operations Coordinator (Excused)
Contractors	Aaron Gross - Ground Zero Landscaping (Excused)
	Wendy Warren - Premier Staffing (Transcription)
Public Attendance	Barbara Bell – Resident
	Paul Carletta - Resident
	John Guido - Resident
	Jack Hedenstrom - Resident
	Deborah Hestrup – Resident
	Jerry Schroer - Resident
	Stacie Young – Resident

III. APPROVAL OF AGENDA

Vice Chair Thomson moved to approve the January 7, 2025, Agenda of the Forest Lakes Roadway and Drainage Advisory Committee MSTU. Second by Ms. Fanning. Carried unanimously 5 - 0.

IV. APPROVAL OF MINUTES – December 3, 2024

Mr. Bernal moved to approve the minutes of the December 3, 2024, Forest Lakes MSTU Advisory Committee meeting subject to the following change:

- *Page 3,* Item VII-A Project Managers Report, Streetlamps, from "… (A cost quote will be requested from Simmonds Electrical to replace the circuit breaker and twenty (or more) lamp fixtures from the east end of Forest Lakes Boulevard to Wilshire Lane.) …," to … A cost quote will be requested from Simmonds Electrical to replace the circuit breaker and twenty (or more) lamp fixtures from the east end of Forest Lakes Boulevard to **Woodshire** Lane. …).

Second by Vice Chair Thomson. Carried unanimously 5 – 0.

V. CONTRACTOR REPORTS

A. Ground Zero Landscaping

Mr. Schumacher reported:

- Landscaping is well trimmed and in good condition.
- Bougainvillea Standards at the entrance were removed.

Comments

- Trimmed entrance Ficus debris was not removed the day of pruning.
- Pine needles should be removed from sidewalks.
- Flowers growing over the culvert on Woodshire Lane should be cut back.

Mr. Schumacher *will clarify with Ground Zero Landscaping the time frame standard for removal of pruning debris and request sidewalks and culverts be cleared of vegetation.*

VI. PROJECT MANAGERS REPORT – Dan Schumacher

A. Budget Report

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*
Forest Lakes MSTU Fund 1626 Budget for January 7, 2025, prepared December 30, 2024.

Mr. Schumacher provided an overview of the budget highlighting:

- Purchase Orders
  1. City of Naples – reclaimed irrigation water.
  2. FPL – electricity.
  3. Ground Zero Landscaping – grounds maintenance
     a. Incidentals – landscape materials and refurbishment.
     b. Maintenance – regular landscape, swales & irrigation maintenance.
  4. Mettauer Environmental – lake weed control and aerator maintenance.
  5. Pavement Maintenance – concrete sidewalk curbs.
  6. Premier Staffing – transcription services.
  7. Simmonds Electrical – lighting & general electrical services.
  8. SiteOne Landscape Supply – irrigation parts and pumps.

- Budget Summary
  a. Line 1, Revenue – Millage Collected and Interest budgeted at $1,288,800.
  b. Line 2, Carry Forward – Unexpended Prior Year (2024) Funds 2,504,100.
  c. Line 3, Revenue Total – A total of $3,772,900.
  d. Line 22, Operating Expense – Of the $311,200 budgeted, $115,195 is committed to existing Purchase Orders and $34,407 is expended, leaving the remainder of $161,597 available within budget for additional operating expenses as needed.
  e. Line 26, County Overhead – Of the $108,500 budgeted, $24,599 has been transferred and a balance of $83,900 remains for transfer. (PTNE Staff & support, Property Appraiser & Tax Collector).
  f. Line 27, Reserves for Capital - A balance of $2,953,200 remains for improvement projects.
  g. Line 28, Reserves for Roadway Paving – $400,000 of budgeted Capital Reserve funds are designated for roadway paving.
  h. Line 29, Capital Reserves total balance is $3,353,200 (the combined total of Lines 27 and 28).

i. Line 30, All Expenses – Of the $3,772,900 budgeted, tabulated Commitments to existing Purchase Orders total $115,195 and $59,006 has been expended, leaving a remainder of $3,598,697 available for MSTU expenditures.
j. Unexpended funds will carryforward to the FY-26 budget.

- General
  a. MSTU Tax Rate: 4.0 Mills (0.4%) to maintain MSTU Roadways and Stormwater Drainage within the taxing district.
  b. The millage rate of 4.00 per $1,000 of Ad Valorem taxable value will be reviewed during the FY-26 Budget planning process.
  c. The Ad Valorem property tax value increased 7.65% for fiscal year 2025 over 2024 generating additional revenue of $87,975.
  d. Funds collected by the Forest Lakes MSTU cannot be utilized outside of the MSTU.

Mr. Schumacher noted:

Lake Maintenance

- Mettauer's contract for lake vegetation maintenance continues through February 2026, with an RFQ for Aquatic Vegetation Control being prepared.
- A *Request for Quote* (RFQ) to replace the Lake #9 fountain lake fountain has been issued.
- The Lake 15 retaining wall repair will be funded from the "Reserves for Capital" category.

Curb Replacement

- The invoice for Pavement Maintenance (PMI) replacement and/or repair of 100 lineal feet of valley gutter on the west side and drain inlets on the east side of Woodshire Lane will be processed upon verification of dimensions.

Streetlamps

- Simmonds Electrical replaced circuit breakers and lamp fixtures from the east end of Forest Lakes Boulevard to Woodshire Lane.

Asset Management Plan

- The *Capital Asset Plan* report, dated June 4, 2024, estimates life expectancies of MSTU assets and corresponding expenditure projections to fund maintenance.
- Assets include roadway pavement, stormwater drainage swales & structures, landscaping & irrigation, lake fountains & weed control, seawalls, sidewalks & lighting, and fencing.
- Entryway light maintenance and lamp replacement have been identified as an MSTU asset and will be incorporated into the plan.
- As of June 4, 2024, maintenance and repair estimates throughout 2028 total $2,140,995.
- The plan will be updated during the 2026 budget planning period.

B. 2025 Projects

Mr. Schumacher tabulated a working list of projects for 2025.

Rank	Vendor	Subject
1	TBD - Bids Received	Lake #9 Fountain Replacement Review & Award
2	Preferred Materials	Woodshire Repaving Mill, Base Repair, & Pave
3	RFQ 3-Quote	Aquatic Weed Control Issue & Award
4	LJA / ABB Fence	Woodshire Property Line Land Survey
5	CMI	Specification Lake #15 Wall Repair Verify & Select

6	RFQ	Library Lake #15 Wall Repair Award for Installation
7	Carter Fence Fence -	Woodshire Equip & Install Order Upon Survey
8	Outdoor Lighting	Entryway Low Volt Lighting Quote & Repair
9	LJA / ABB	Swales Data, Plats, & Easements Data Analysis
10	Proj Mgr	Capital Asset Plan - FY25 Update Estimates
11	Preferred Materials	Rip-Rap Stone for Lake Perimeters BCC Approval
12	TBD	LED Street Light Lamp Fixture Conversion to LED

Caveats:

- Priorities may shift.
- Projects may be added, deleted, or delayed.
- Procurement price limits may increase; would simplify low-dollar purchases.
- New contracts may become available.

Outdoor Lighting

Mr. Schumacher reported:

- Windham Studios provided the records for the layout of MSTU landscape lighting, noting Hannula Landscaping was awarded the contract.
- Hannula Landscaping & Irrigation, Inc. sub-contracted the entry lighting project to Outdoor Lighting Perspectives.
- Outdoor Lighting Perspectives located the files for the layout of MSTU outdoor landscape lighting for the Palm trees on the entrance median.
- He determined that lighting maintenance and lamp replacement for the front entry sign are an MSTU responsibility.
- Outdoor Lighting Perspectives will be established as a County vendor and a cost proposal solicited to repair the landscape lighting.

LJA/ABB Swales Data

Mr. Schumacher reported:

- LJA Engineering will incorporate recent survey data including riprap locations and easement/property lines into their plans.
- The report will enable an evaluation of the golf course swale areas which need to be recontoured.

Member Comments - Lake Levels

- Flooding occurs during storm events around the Turtle Lakes Condominium sign posing a potential safety risk.
- The drainage system from the Condominiums through the golf course to Lake 5 should be evaluated to improve the water level.
- This item should be considered for addition to the 2025 project list.

Projects may be added, deleted or delayed and priorities may shift.

VII. ONGOING BUSINESS

A. Lake 9 Fountains

Mr. Schumacher reported:

Lake 9 Fountain Replacement

- Requests for Quotes (RFQ), based on time and materials, for a 3 horsepower Kasco aerator fountain to be installed, were received from three vendors.
- The vendor selected agreed to release the "Terms & Conditions" cited in their proposal in accordance with the Procurement Division's and County Attorney's request.
- A Purchase Order will be issued and installation scheduled.

Lake 14 Fountain Repair

- Mettauer Environmental determined the pump house controller (under warranty) on the east side of the fountain is malfunctioning and has consulted Kasco for repair/replacement recommendation.

B. Woodshire Lane Paving

Mr. Schumacher reported:

- Forest Lakes roads are in County inventory but not maintained by the County.
- A Request for Quote (RFQ), utilizing the *Asphalt Maintenance and Related Services Contract,* has been submitted to Preferred Materials (PM) for the Woodshire Lane paving project.
- Road Maintenance Div staff will walk the area mid to assess the conditions and provide an opinion on the project scope.
- A PM proposal will be presented to the Committee and, with approval, a Purchase Order issued.
- Work is anticipated in the calendar year 2025.

C. Shopping Center Screening - Hedge & Fence

Mr. Schumacher reported:

Landscape Installation

- The Ficus hedge and vegetation screening bordering the Pine Ridge Crossing Shopping Center and Woodshire Lane on the east boundary of the community has deteriorated.
- He requested remediation of the situation from Roger McGuinness, Kite Realty Group, noting that the irrigation system should be evaluated including running frequency (number of days per week) and water coverage volume.
- Code Enforcement will be consulted if the situation is not addressed.

Fence Installation Woodshire Lane/Pine Ridge Crossing Shopping Center

- The area between Woodshire Lane and the Pine Ridge Crossing Shopping Center houses utilities and a steep washed out roadway berm along Woodshire Lane, posing a safety risk to pedestrians cutting through between Woodshire Lane and the center.
- The fence running south of this area, along the shared property line, may be extended to The Crossings parking lot entrance off Woodshire Lane at the north end.
- Quotes for a heavier gauge link fence, both galvanized and black vinyl coated, have been requested from Carter Fence Company.
- A licensed land surveyor on contract with the County will be retained to survey the area.
- Upon installation of the fence extension, Ground Zero Landscaping will install a low block paver wall (approx. 15ft length) along the base of the fence at the ravine, plus Bahia Grass sod to address erosion.

Mr. Schumacher will:

- Solicit an opinion from Carter Fence Company on the advantages of black vinyl vs. galvanized chain link fencing.
- Request the Committee members endorsement for selection of chain link fencing material at a future meeting.

C. Lake 15 Wall Replacement

Mr. Schumacher reported:

- A baseline for a replacement lake retaining wall (seawall) has been received from a Marine supply company.
- The design does not utilize a poured cap, with the associated truck access.
- Upon completion of a final design, approval by a licensed structural engineer will be obtained in order to proceed.
- Project installation will be coordinated with the Quail Run Golf Club.

VIII. NEW BUSINESS

A. Quail Run Riprap Replenishment

Mr. Schumacher reported:

- Quail Run Golf Club (QRGC) requested the MSTU provide riprap material for their lakes, with club Staff to perform the installation.
- A quote for riprap material, based on Mr. Burnham's tonnage estimate and stone size, will be solicited from PMI in accordance with the *Asphalt Maintenance and Related Services Contract.*
- As recommended by the County Attorney's office (CAO), the proposed cost sharing arrangement will be submitted to the Board of County Commissioners for approval.
- The proposal will be presented to the Committee for consideration.
- The project will be scheduled for April/May 2025.

B. Woodshire Lane Trees & Palms

- Trees will be evaluated for decay and removal prior to the paving project, removal paid for by the respective condominium association(s) which own them.

IX. COMMITTEE MEMBER COMMENTS

Shrub Removal

- A thank you was extended to the Turtle Lakes Condominium Association for clearing Brazilian Pepper shrubs.

X. PUBLIC COMMENTS

Mr. Schumacher responded:

Tree Replacement

- Ground Zero Landscaping noted a sprinkler head interfered with the location of the golf course parking lot tree damaged by an auto accident and did not recommend replacement.

Forest Lakes Boulevard Pothole

- Repair the pothole on Forest Lakes Boulevard is on the Road Maintenance Division's T*ask List*. He will follow up on the repair schedule date.

XI. ADJOURNMENT

There being no further business to come before the Committee, the meeting was adjourned by the Chair at 10:45 A.M.

FOREST LAKES ROADWAY AND DRAINAGE MSTU ADVISORY COMMITTEE

_____

Greg Pollock, Chair

The Minutes were approved by the Committee on _____,2025 as presented ____, or as amended ____.

https://www.collierptne.com/forest-lakes-roadway-drainage-advisory-committee/

NEXT MEETING: **FEBRUARY 4, 2025 - 10:00 A.M.**
FOREST LAKES CONDO ASSOCIATION CLUBHOUSE
NAPLES, FL 34105
(239) 261-5497

Forest Lakes M.S.T.U.
Fund 1626
February 4, 2025

	FY-25	Vendor	Item	PO#	Budget	Commitments	Expenditures	Available
1	MILLAGE COLLECTED & INTEREST		MSTU Revenues		$ (1,268,800.00)	$ -	$ (1,083,245.36)	$ (185,554.64)
2	CARRY FORWARD		Unexpended Prior Year Funds		$ (2,504,100.00)	$ -	$ -	$ (2,504,100.00)
3	**ALL REVENUES**				**$ (3,772,900.00)**	**$ -**	**$ (1,083,245.36)**	**$ (2,689,654.64)**
4	ENG. FEES & OTHERS (631400)				$ 25,000.00	$ -	$ -	$ 25,000.00
5	INDIRECT COST REIMBURSE	Collier County	Indirect Cost	Direct Pay	$ 3,900.00	$ 3,900.00	$ -	$ -
6	INTERDEPARTMENT PAYMENT	IGC#100474	30x30 Stop Sign @51 Forest Lakes Blvd				$ 50.75	$ (50.75)
		Ground Zero Landscaping	Non-Bid Schedule Items	4500233638		$ 2,280.00	$ 720.00	
		Ground Zero Landscaping	Landscape Incidentals	4500233638		$ 5,443.98	$ 9,556.02	
7	LANDSCAPE INCIDENTALS (634990)				$ 10,000.00	$ 7,723.98	$ 10,276.02	$ (8,000.00)
		Ground Zero Landscaping	Grounds Maintenance	4500233638		$ 48,359.00	$ 17,641.00	
8	OTHER CONTRACTUAL (634999)				$ 100,000.00	$ 48,359.00	$ 17,641.00	$ 34,000.00
		Pavement Maintenance	Concrete Sidewalks, Curbs	4500233648		$ 3,980.00	$ 21,020.00	
		Mettauer Environmental	Lakes Maintenance Maintenance	4500233643		$ 675.00	$ 2,300.00	
9	OTHER CONTRACTUAL (639990)				$ 140,600.00	$ 4,655.00	$ 23,320.00	$ 112,625.00
10	ELECTRICITY	FPL	Electricity	4700005161	$ 13,500.00	$ 9,670.57	$ 3,829.43	$ 0.00
11	WATER & SEWER	City of Naples	Water - Reclaimed Irrigation	4700005192	$ 3,000.00	$ 2,480.20	$ 519.80	$ 0.00
12	INSURANCE GENERAL	Collier County	Insurance	Direct Pay	$ 600.00	$ 600.00	$ -	$ -
13	SPRINKLER SYSTEM	SiteOne	Irrigation Parts & Pumps	4500235293	$ 1,500.00	$ 3,500.00	$ -	$ (2,000.00)
14	MULCH				$ 1,000.00	$ -	$ -	$ 1,000.00
		Simmonds Electrical	Electrical Services	4500233651		$ 4,146.54	$ 5,853.46	
15	LIGHTING MAINTENANCE (646451)				$ 6,000.00	$ 4,146.54	$ 5,853.46	$ (4,000.00)
16	LICENSE & PERMITS				$ 2,000.00	$ -	$ -	$ 2,000.00
17		Premier Staffing	Transcription	4500234228		$ 2,369.05	$ 608.85	
18	OTHER MISCELLANEOUS (649990)				$ 3,000.00	$ 2,369.05	$ 608.85	$ 22.10
19	OFFICE SUPPLIES				$ 100.00	$ -	$ -	$ 100.00
20	COPYING CHARGES	J.M. Todd	Copier CPC	4500234730	$ 200.00	$ 108.39	$ 41.61	$ 50.00
21	FERT HERB CHEM				$ 500.00	$ -	$ -	$ 500.00
22	OTHER OPERATING				$ 300.00	$ -	$ -	$ 300.00
23	**OPERATING EXPENSES**				**$ 311,200.00**	**$ 87,512.73**	**$ 62,140.92**	**$ 161,546.35**
24	PTNE STAFF & DIVISION OVERHEAD				$ 72,600.00	$ -	$ -	$ 72,600.00
25	PROPERTY APPRAISER				$ 9,400.00	$ -	$ 4,542.60	$ 4,857.40
26	TAX COLLECTOR				$ 26,500.00	$ -	$ 23,213.83	$ 3,286.17
27	**COUNTY OVERHEAD**				**$ 108,500.00**	**$ -**	**$ 27,756.43**	**$ 80,743.57**
28	RESERVES FOR CAPITAL				$ 2,953,200.00	$ -	$ -	$ 2,953,200.00
29	RESERVES FOR ROADWAY REPAVING				$ 400,000.00	$ -	$ -	$ 400,000.00
30	**CAPITAL RESERVES**				**$ 3,353,200.00**	**$ -**	**$ -**	**$ 3,353,200.00**
31	**ALL EXPENSES**				**$ 3,772,900.00**	**$ 87,512.73**	**$ 89,897.35**	**$ 3,595,489.92**
32	**FY-25 BUDGET GRAND TOTAL**		= ALL REVENUES - ALL EXPENSES		**$ -**	**$ 87,512.73**	**$ (993,348.01)**	**$ 905,835.28**

Forest Lakes M.S.T.U.
Fund 1626
February 4, 2025

129,715,669	FY 13 Final Taxable Value	-2.4%		
129,977,881	FY 14 Final Taxable Value	0.2%		
140,171,072	FY 15 Final Taxable Value	7.8%		
152,711,783	FY 16 Final Taxable Value	8.9%		
165,722,702	FY 17 Final Taxable Value	8.5%		
190,428,196	FY 18 Final Taxable Value	14.9%		
202,132,375	FY 19 Final Taxable Value	6.1%		
210,299,015	FY 20 Final Taxable Value	4.0%		
219,999,549	FY 21 Final Taxable Value	4.6%		
227,701,198	FY 22 Final Taxable Value	3.5%		
257,799,765	FY 23 Final Taxable Value	13.2%	+7.0% Average	
294,456,887	FY 24 Final Taxable Value	14.2%		
$316,450,549	**FY 25 Gross Taxable Value**			
7.65%	**Adjustment FY 24 to FY 25**			
	FY 25 Gross MSTU Revenue	FY 24		
Millage	**4.0000**	4.0000	**4.0 mill cap**	
Tax Dollars	**$1,265,802**	$1,177,828	**$87,975**	**Increase**

Total Available Balance	**$ 3,595,489.92**
Plus Commited And Not Spent	**$ 87,512.73**
Estimated Cash	**$ 3,683,002.65**

Prepared 01.28.2025 ZS

FOREST LAKES

ROADWAY AND DRAINAGE M.S.T.U. ADVISORY COMMITTEE

8300 Radio Road - Naples, FL 34104

MINUTES

JANUARY 7, 2025

I. CALL TO ORDER

Chair Pollock called the meeting to order at 10:00 A.M. Roll call was taken, and a quorum of five was present.

II. ATTENDANCE

Advisory Committee	Greg Pollock – Chair
	Kathy Thomson – Vice Chair
	Patrick Bernal
	Marianne Fanning
	Jerry Norsic
Staff	Brian Wells – Director, PTNE (Excused)
	Dan Schumacher – Project Manager
	Rosio Garcia – Operations Coordinator (Excused)
Contractors	Aaron Gross - Ground Zero Landscaping (Excused)
	Wendy Warren - Premier Staffing (Transcription)
Public Attendance	Barbara Bell – Resident
	Paul Carletta - Resident
	John Guido - Resident
	Jack Hedenstrom - Resident
	Deborah Hestrup – Resident
	Jerry Schroer - Resident
	Stacie Young – Resident

III. APPROVAL OF AGENDA

Vice Chair Thomson moved to approve the January 7, 2025, Agenda of the Forest Lakes Roadway and Drainage Advisory Committee MSTU. Second by Ms. Fanning. Carried unanimously 5 - 0.

IV. APPROVAL OF MINUTES – December 3, 2024

Mr. Bernal moved to approve the minutes of the December 3, 2024, Forest Lakes MSTU Advisory Committee meeting subject to the following change:

- *Page 3,* Item VII-A Project Managers Report, Streetlamps, from "… (A cost quote will be requested from Simmonds Electrical to replace the circuit breaker and twenty (or more) lamp fixtures from the east end of Forest Lakes Boulevard to Wilshire Lane.) …," to … A cost quote will be requested from Simmonds Electrical to replace the circuit breaker and twenty (or more) lamp fixtures from the east end of Forest Lakes Boulevard to **Woodshire** Lane. …).

Second by Vice Chair Thomson. Carried unanimously 5 – 0.

V. CONTRACTOR REPORTS

A. Ground Zero Landscaping

Mr. Schumacher reported:

- Landscaping is well trimmed and in good condition.
- Bougainvillea Standards at the entrance were removed.

Comments

- Trimmed entrance Ficus debris was not removed the day of pruning.
- Pine needles should be removed from sidewalks.
- Flowers growing over the culvert on Woodshire Lane should be cut back.

Mr. Schumacher *will clarify with Ground Zero Landscaping the time frame standard for removal of pruning debris and request sidewalks and culverts be cleared of vegetation.*

VI. PROJECT MANAGERS REPORT – Dan Schumacher

A. Budget Report

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*
Forest Lakes MSTU Fund 1626 Budget for January 7, 2025, prepared December 30, 2024.

Mr. Schumacher provided an overview of the budget highlighting:

- Purchase Orders
  1. City of Naples – reclaimed irrigation water.
  2. FPL – electricity.
  3. Ground Zero Landscaping – grounds maintenance
     a. Incidentals – landscape materials and refurbishment.
     b. Maintenance – regular landscape, swales & irrigation maintenance.
  4. Mettauer Environmental – lake weed control and aerator maintenance.
  5. Pavement Maintenance – concrete sidewalk curbs.
  6. Premier Staffing – transcription services.
  7. Simmonds Electrical – lighting & general electrical services.
  8. SiteOne Landscape Supply – irrigation parts and pumps.

- Budget Summary
  a. Line 1, Revenue – Millage Collected and Interest budgeted at $1,288,800.
  b. Line 2, Carry Forward – Unexpended Prior Year (2024) Funds 2,504,100.
  c. Line 3, Revenue Total – A total of $3,772,900.
  d. Line 22, Operating Expense – Of the $311,200 budgeted, $115,195 is committed to existing Purchase Orders and $34,407 is expended, leaving the remainder of $161,597 available within budget for additional operating expenses as needed.
  e. Line 26, County Overhead – Of the $108,500 budgeted, $24,599 has been transferred and a balance of $83,900 remains for transfer. (PTNE Staff & support, Property Appraiser & Tax Collector).
  f. Line 27, Reserves for Capital - A balance of $2,953,200 remains for improvement projects.
  g. Line 28, Reserves for Roadway Paving – $400,000 of budgeted Capital Reserve funds are designated for roadway paving.
  h. Line 29, Capital Reserves total balance is $3,353,200 (the combined total of Lines 27 and 28).

i. Line 30, All Expenses – Of the $3,772,900 budgeted, tabulated Commitments to existing Purchase Orders total $115,195 and $59,006 has been expended, leaving a remainder of $3,598,697 available for MSTU expenditures.
j. Unexpended funds will carryforward to the FY-26 budget.

- General
  a. MSTU Tax Rate: 4.0 Mills (0.4%) to maintain MSTU Roadways and Stormwater Drainage within the taxing district.
  b. The millage rate of 4.00 per $1,000 of Ad Valorem taxable value will be reviewed during the FY-26 Budget planning process.
  c. The Ad Valorem property tax value increased 7.65% for fiscal year 2025 over 2024 generating additional revenue of $87,975.
  d. Funds collected by the Forest Lakes MSTU cannot be utilized outside of the MSTU.

Mr. Schumacher noted:

Lake Maintenance

- Mettauer's contract for lake vegetation maintenance continues through February 2025, with an RFQ for Aquatic Vegetation Control being prepared.
- A *Request for Quote* (RFQ) to replace the Lake #9 fountain lake fountain has been issued.
- The Lake 15 retaining wall repair will be funded from the "Reserves for Capital" category.

Curb Replacement

- The invoice for Pavement Maintenance (PMI) replacement and/or repair of 100 lineal feet of valley gutter on the west side and drain inlets on the east side of Woodshire Lane will be processed upon verification of dimensions.

Streetlamps

- Simmonds Electrical replaced circuit breakers and lamp fixtures from the east end of Forest Lakes Boulevard from Woodshire Lane.

Asset Management Plan

- The *Capital Asset Plan* report, dated June 4, 2024, estimates life expectancies of MSTU assets and corresponding expenditure projections to fund maintenance.
- Assets include roadway pavement, stormwater drainage swales & structures, landscaping & irrigation, lake fountains & weed control, seawalls, sidewalks & lighting, and fencing.
- Entryway light maintenance and lamp replacement have been identified as an MSTU asset and will be incorporated into the plan.
- As of June 4, 2024, maintenance and repair estimates throughout 2028 total $2,140,995.
- The plan will be updated during the 2026 budget planning period.

B. 2025 Projects

Mr. Schumacher tabulated a working list of projects for 2025.

Rank	Vendor	Subject
1	TBD - Bids Received	Lake #9 Fountain Replacement Review & Award
2	Preferred Materials	Woodshire Repaving Mill, Base Repair, & Pave
3	RFQ 3-Quote	Aquatic Weed Control Issue & Award
4	LJA / ABB Fence	Woodshire Property Line Land Survey
5	CMI	Specification Lake #15 Wall Repair Verify & Select

6	RFQ	Lake #15 Wall Repair Award for Installation
7	Carter Fence Fence -	Woodshire Equip & Install Order Upon Survey
8	Outdoor Lighting	Entryway Low Volt Lighting Quote & Repair
9	LJA / ABB	Swales Data, Plats, & Easements Data Analysis
10	Proj Mgr	Capital Asset Plan - FY25 Update Estimates
11	Preferred Materials	Rip-Rap Stone for Lake Perimeters BCC Approval
12	TBD	LED Street Light Lamp Fixture Conversion to LED

Caveats:

- Priorities may shift.
- Projects may be added, deleted, or delayed.
- Procurement price limits may increase; would simplify low-dollar purchases.
- New contracts may become available.

Outdoor Lighting

Mr. Schumacher reported:

- Windham Studios provided the records for the layout of MSTU landscape lighting, noting Hannula Landscaping was awarded the contract.
- Hannula Landscaping & Irrigation, Inc. sub-contracted the entry lighting project to Outdoor Lighting Perspectives.
- Outdoor Lighting Perspectives located the files for the layout of MSTU outdoor landscape lighting for the Palm trees on the entrance median.
- He determined that lighting maintenance and lamp replacement for the front entry sign are an MSTU responsibility.
- Outdoor Lighting Perspectives will be established as a County vendor and a cost proposal solicited to repair the landscape lighting.

LJA/ABB Swales Data

Mr. Schumacher reported:

- LJA Engineering will incorporate recent survey data including riprap locations and easement/property lines into their plans.
- The report will enable an evaluation of the golf course swale areas which need to be recontoured.

Member Comments - Lake Levels

- Flooding occurs during storm events around the Turtle Lakes Condominium sign posing a potential safety risk.
- The drainage system from the Condominiums through the golf course to Lake 5 should be evaluated to improve the water level.
- This item should be considered for addition to the 2025 project list.

Projects may be added, deleted or delayed and priorities may shift.

VII. ONGOING BUSINESS

A. Lake 9 Fountains

Mr. Schumacher reported:

Lake 9 Fountain Replacement

- Requests for Quotes (RFQ), based on time and materials, for a 3 horsepower Kasco aerator fountain to be installed, were received from three vendors.
- The vendor selected agreed to release the "Terms & Conditions" cited in their proposal in accordance with the Procurement Division's and County Attorney's request.
- A Purchase Order will be issued and installation scheduled.

Lake 14 Fountain Repair

- Mettauer Environmental determined the pump house controller (under warranty) on the east side of the fountain is malfunctioning and has consulted Kasco for repair/replacement recommendation.

B. Woodshire Lane Paving

Mr. Schumacher reported:

- Forest Lakes roads are in County inventory but not maintained by the County.
- A Request for Quote (RFQ), utilizing the *Asphalt Maintenance and Related Services Contract,* has been submitted to Preferred Materials (PM) for the Woodshire Lane paving project.
- Road Maintenance Div staff will walk the area mid to assess the conditions and provide an opinion on the project scope.
- A PM proposal will be presented to the Committee and, with approval, a Purchase Order issued.
- Work is anticipated in the calendar year 2025.

C. Shopping Center Screening - Hedge & Fence

Mr. Schumacher reported:

Landscape Installation

- The Ficus hedge and vegetation screening bordering the Pine Ridge Crossing Shopping Center and Woodshire Lane on the east boundary of the community has deteriorated.
- He requested remediation of the situation from Roger McGuinness, Kite Realty Group, noting that the irrigation system should be evaluated including running frequency (number of days per week) and water coverage volume.
- Code Enforcement will be consulted if the situation is not addressed.

Fence Installation Woodshire Lane/Pine Ridge Crossing Shopping Center

- The area between Woodshire Lane and the Pine Ridge Crossing Shopping Center houses utilities and a steep washed out roadway berm along Woodshire Lane, posing a safety risk to pedestrians cutting through between Woodshire Lane and the center.
- The fence running south of this area, along the shared property line, may be extended to The Crossings parking lot entrance off Woodshire Lane at the north end.
- Quotes for a heavier gauge link fence, both galvanized and black vinyl coated, have been requested from Carter Fence Company.
- A licensed land surveyor on contract with the County will be retained to survey the area.
- Upon installation of the fence extension, Ground Zero Landscaping will install a low block paver wall (approx. 15ft length) along the base of the fence at the ravine, plus Bahia Grass sod to address erosion.

Mr. Schumacher will:

- Solicit an opinion from Carter Fence Company on the advantages of black vinyl vs. galvanized chain link fencing.
- Request the Committee members endorsement for selection of chain link fencing material at a future meeting.

C. Lake 15 Wall Replacement

Mr. Schumacher reported:

- A baseline for a replacement lake retaining wall (seawall) has been received from a Marine supply company.
- The design does not utilize a poured cap, with the associated truck access.
- Upon completion of a final design, approval by a licensed structural engineer will be obtained in order to proceed.
- Project installation will be coordinated with the Quail Run Golf Club.

VIII. NEW BUSINESS

A. Quail Run Riprap Replenishment

Mr. Schumacher reported:

- Quail Run Golf Club (QRGC) requested the MSTU provide riprap material for their lakes, with club Staff to perform the installation.
- A quote for riprap material, based on Mr. Burnham's tonnage estimate and stone size, will be solicited from PMI in accordance with the *Asphalt Maintenance and Related Services Contract.*
- As recommended by the County Attorney's office (CAO), the proposed cost sharing arrangement will be submitted to the Board of County Commissioners for approval.
- The proposal will be presented to the Committee for consideration.
- The project will be scheduled for April/May 2025.

B. Woodshire Lane Trees & Palms

- Trees will be evaluated for decay and removal prior to the paving project, removal paid for by the respective condominium association(s) which own them.

IX. COMMITTEE MEMBER COMMENTS

Shrub Removal

- A thank you was extended to the Turtle Lakes Condominium Association for clearing Brazilian Pepper shrubs.

X. PUBLIC COMMENTS

Mr. Schumacher responded:

Tree Replacement

- Ground Zero Landscaping noted that the location of a golf course parking lot tree destroyed by an auto accident and did not recommend replacement due to the location of a taller overhanging tree. An adjacent irrigation head will be disabled, as no longer needed.

Forest Lakes Boulevard Pothole

- Repair the pothole on Forest Lakes Boulevard is on the Road Maintenance Division's T*ask List*. He will follow up on the repair schedule date.

XI. ADJOURNMENT

There being no further business to come before the Committee, the meeting was adjourned by the Chair at 10:45 A.M.

FOREST LAKES ROADWAY AND DRAINAGE MSTU ADVISORY COMMITTEE

Greg Pollock

Greg Pollock, Chair

The Minutes were approved by the Committee on Feb 4 ,2025 as presented ____, or as amended ✓.

https://www.collierptne.com/forest-lakes-roadway-drainage-advisory-committee/

NEXT MEETING: **FEBRUARY 4, 2025 - 10:00 A.M.**
FOREST LAKES CONDO ASSOCIATION CLUBHOUSE
NAPLES, FL 34105
(239) 261-5497

XI. ADJOURNMENT

There being no further business to come before the Committee, the meeting was adjourned by the Chair at 10:45 A.M.

FOREST LAKES ROADWAY AND DRAINAGE MSTU ADVISORY COMMITTEE

_____

Greg Pollock, Chair

The Minutes were approved by the Committee on _____,2025 as presented ____, or as amended ____.

https://www.collierptne.com/forest-lakes-roadway-drainage-advisory-committee/

NEXT MEETING: **FEBRUARY 4, 2025 - 10:00 A.M.**
FOREST LAKES CONDO ASSOCIATION CLUBHOUSE
NAPLES, FL 34105
(239) 261-5497

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

February 26, 2025

FOR IMMEDIATE RELEASE

Notice of Public Meeting
Forest Lakes Roadway & Drainage MSTU Advisory Committee
Collier County, Florida

March 4, 2025
10:00 a.m.

Notice is hereby given that the **Forest Lakes Roadway & Drainage Municipal Service Taxing Unit MSTU Advisory Committee** will meet on **Tuesday, March 4, 2025,** at **10:00 a.m.** in the Clubhouse at Forest Lakes, 1058 Forest Lakes Drive, Naples, Florida.

Individuals who would like to participate in person must complete and submit a speaker form prior to the beginning of the discussion about the item.

The agenda will be available on the Collier County Government website at www.collierptne.com/mtsu/forest-lakes-roadway-drainage-advisory-commitee/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Dan Schumacher at (239) 252-5775.

FOREST LAKES

ROADWAY AND DRAINAGE M.S.T.U. ADVISORY COMMITTEE

8300 Radio Road
Naples, FL 34104

AGENDA

March 4, 2025

I. CALL TO ORDER

II. ATTENDANCE

Advisory Committee:

- Greg Pollock – Chair (4/21/2026)
- Kathy Thomson – Vice Chair (4/21/2027)
- Patrick Bernal (4/21/2027)
- Marianne Fanning (4/21/2026)
- Jerry Norsic (4/21/2028)

County Staff:

- Brian Wells – Director, PTNE
- Dan Schumacher – MSTU Project Manager

Contractor(s):

- Aaron Gross – Ground Zero Landscaping

III. APPROVAL OF AGENDA

IV. APPROVAL OF MINUTES – FEBRUARY 4, 2025

V. CONTRACTOR REPORTS

A. Ground Zero Landscaping – Aaron Gross

VI. PROJECT MANAGERS REPORT – Dan Schumacher

A. BUDGET REPORT

VII. ONGOING BUSINESS

A. Lake 9 Fountain Replacement
B. Woodshire Paving
C. Shopping Center Screening – Hedge & Fence
D. Lake 15 Wall Replacement

VIII. NEW BUSINESS

A. Quail Run Lakes – Rip-Rap Replenishment

IX. COMMITTEE MEMBER COMMENTS

X. PUBLIC COMMENTS

XI. ADJOURNMENT

NEXT MEETING

APRIL 1ST, 2025 - 10:00 AM
FOREST LAKES CONDO ASSOCIATION CLUBHOUSE
1058 FOREST LAKES DRIVE, NAPLES, FL 34112
(239) 261-5497

FOREST LAKES

ROADWAY AND DRAINAGE M.S.T.U. ADVISORY COMMITTEE

8300 Radio Road - Naples, FL 34104

MINUTES

FEBRUARY 4, 2025

I. CALL TO ORDER

Chair Pollock called the meeting to order at 10:00 A.M. Roll call was taken, and a quorum of four was present.

II. ATTENDANCE

Advisory Committee	Greg Pollock – Chair
	Kathy Thomson – Vice Chair
	Patrick Bernal
	Marianne Fanning (Excused)
	Jerry Norsic
Staff	Brian Wells – Director, PTNE (Excused)
	Dan Schumacher – Project Manager
	Rosio Garcia – Operations Coordinator (Excused)
Contractors	Aaron Gross - Ground Zero Landscaping
	Wendy Warren - Premier Staffing (Transcription)
Public Attendance	Doug Burnham – General Manager, QRGC
	Barbara Bell – Resident
	Paul Carletta - Resident
	Jack Hedenstrom - Resident
	Deborah Hestrup – Resident
	Rick Korb - QRGC
	Russell Peter – Resident
	Steve Thomson - Resident
	Stacie Young – Resident

III. APPROVAL OF AGENDA

Mr. Norsic moved to approve the February 4, 2025, Agenda of the Forest Lakes Roadway and Drainage Advisory Committee MSTU. Second by Vice Chair Thomson. Carried unanimously 4 - 0.

IV. APPROVAL OF MINUTES – January 7, 2025

Mr. Norsic moved to approve the minutes of the January 7, 2025, Forest Lakes MSTU Advisory Committee meeting subject to the following change:

- *Page 3,* Item VII-A Project Managers Report, Streetlamps, from "Simmonds Electrical replaced circuit breakers and lamp fixtures from the east end of Forest Lakes Boulevard to Woodshire Lane.) …," to …. Simmonds Electrical replaced circuit breakers and lamp fixtures from the east end of Forest Lakes Boulevard **from** Woodshire Lane ….).
- *Page 4,* Item VII-B Project Managers Report, 2025 Projects, from "6. RFQ - **Library** Lake #15 - Wall Repair Award for Installation.) …," to …. 6. RFQ - Lake 15 - Wall Repair Award for Installation …).
- *Page 6,* Item IX – Public Comments, Tree Replacement, from "Ground Zero Landscaping noted a sprinkler head interfered with the location of the golf course parking lot tree

damaged by an auto accident and did not recommend replacement.) …," to …. Ground Zero Landscaping noted **that the location of a golf course parking lot tree was destroyed by an auto accident and did not recommend replacement due to the location of a taller overhanging tree. An adjacent irrigation head will be disabled, as no longer needed** …).

Second by Mr. Bernal. Carried unanimously 4 – 0.

V. CONTRACTOR REPORTS

A. Ground Zero Landscaping

Mr. Schumacher and Mr. Gross reported:

- Landscaping is well trimmed and in good condition.
- Tree limbs interfering with light pole lamps were pruned.
- Flowers growing over the culvert on Woodshire Lane were cut back.
- Fertilizer will be applied in February.
- The irrigation system (not an MSTU asset) that waters the Ficus hedge and vegetation bordering the Pine Ridge Crossing Shopping Center and Woodshire Lane on the east boundary of the community is functioning. Ground Zero Landscaping will monitor the condition of the plantings.
- The replacement cap for the irrigation meter, received by SiteOne, will be installed by Ground Zero Landscaping.

Public Utility Easement

Mr. Schumacher noted:

- The east side entry from Pine Ridge Road onto Forest Lakes Boulevard has a ten-foot utility easement between the road and the single-family homes on Azalea Boulevard.
- Florida Power and Light is responsible for maintaining the area and providing screening/landscaping.

VI. PROJECT MANAGERS REPORT – Dan Schumacher

A. Budget Report

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Forest Lakes MSTU Fund 1626 Budget for February 4, 2025, prepared January 28, 2025.

Mr. Schumacher provided an overview of the budget highlighting:

- Purchase Orders
  1. City of Naples – reclaimed irrigation water.
  2. FPL – electricity.
  3. Ground Zero Landscaping – grounds maintenance
     a. Incidentals – landscape materials and refurbishment.
     b. Maintenance – regular landscape, swales & irrigation maintenance.
  4. Mettauer Environmental – lake weed control and aerator maintenance.
  5. Pavement Maintenance – concrete sidewalk curbs.
  6. Premier Staffing – transcription services.
  7. Simmonds Electrical – lighting & general electrical services.
  8. SiteOne Landscape Supply – irrigation parts and pumps.

- Budget Summary

a. Line 1, Revenue – Millage Collected and Interest budgeted at $1,268,800.
b. Line 2, Carry Forward – Unexpended Prior Year (2024) Funds 2,504,100.
c. Line 3, Revenue Total – A total of $3,772,900.
d. Line 23, Operating Expense – Of the $311,200 budgeted, $87,512 is committed to existing Purchase Orders and $62,140 is expended, leaving the remainder of $161,546 available within budget for additional operating expenses as needed.
e. Line 27, County Overhead – Of the $108,500 budgeted, $27,750 has been transferred and a balance of $80,743 remains for transfer. (PTNE Staff & support, Property Appraiser & Tax Collector).
f. Line 28, Reserves for Capital - A balance of $2,953,200 remains for improvement projects.
g. Line 29, Reserves for Roadway Paving – $400,000 of budgeted Capital Reserve funds are designated for roadway paving.
h. Line 29, Capital Reserves total balance is $3,353,200 (the combined total of Lines 27 and 28).
i. Line 30, All Expenses – Of the $3,772,900 budgeted, tabulated Commitments to existing Purchase Orders total $115,195 and $59,006 has been expended, leaving a remainder of $3,598,697 available for MSTU expenditures.
j. Unexpended funds will carryforward to the FY-26 budget.

- General
  a. MSTU Tax Rate: 4.0 Mills (0.4%) to maintain MSTU Roadways and Stormwater Drainage within the taxing district.
  b. The millage rate of 4.00 per $1,000 of Ad Valorem taxable value will be reviewed during the FY-26 Budget planning process.
  c. The Ad Valorem property tax value increased 7.65% for fiscal year 2025 over 2024 generating additional revenue of $87,975.
  d. Funds collected by the Forest Lakes MSTU cannot be utilized outside of the MSTU.

Mr. Schumacher noted:

Expenditures and Invoices Processed

- Expenditures can exceed the Budget if funds are available in in the Operating Expense Category for transfer.
- Pavement Maintenance, Inc.'s (PMI) invoice for the Woodshire Lane project was approved for payment.

Lake Maintenance

- Mettauer's contract for lake vegetation maintenance expires February 2026.
- A *Request for Quote* (RFQ) for Aquatic Vegetation Control and lake fountain repairs has been distributed to three vendors.
- The Lake 15 retaining wall repair will be funded from the "Reserves for Capital" category.

Streetlamps

- A roadway tour to identify street light outages will be undertaken.
- LED lamp replacements will be researched.

Asset Management Plan

- The *Capital Asset Plan* report, dated June 4, 2024, estimates life expectancies of MSTU assets and corresponding expenditure projections to fund maintenance.

- Assets include roadway pavement, stormwater drainage swales & structures, landscaping & irrigation, lake fountains & weed control, seawalls, sidewalks & lighting, and fencing.
- Entryway light maintenance and lamp replacement have been identified as an MSTU asset and will be incorporated into the plan.
- As of June 4, 2024, maintenance and repair estimates throughout 2028 total $2,140,995.
- The plan will be updated during the 2026 budget planning period.

Outdoor Lighting

Mr. Schumacher reported:

- Windham Studios provided the records for the layout of MSTU landscape lighting, noting Hannula Landscaping was awarded the contract.
- Hannula Landscaping & Irrigation, Inc. sub-contracted the entry lighting project to Outdoor Lighting Perspectives.
- Outdoor Lighting Perspectives located the files for the layout of the MSTU outdoor landscape lighting for the Palm trees on the entrance median.
- He determined the lighting maintenance and lamp replacement for the front entry sign are an MSTU responsibility.
- On receipt of E-Verify documentation, Outdoor Lighting Perspectives will be established as a County vendor and a Purchase Order issued.
- A cost proposal to repair the landscape lighting will be presented to the Committee at the March meeting.

VII. ONGOING BUSINESS

A. Lake 9 Fountain Replacement

Mr. Schumacher reported:

Lake 9 Fountain Replacement

- Request for Quote (RFQ) documentation, Lump Sum, with specifications for a Kasco aerator fountain to be installed, was distributed with the Agenda.
- Proposals were received from Mettauer Environmental, Solitude Lake Management, and The Lake Doctors.
- The vendor selected agreed to release the "Terms & Conditions" cited in their proposal in accordance with the Procurement Division's and County Attorney's request.
- Contingent upon receipt of insurance and E-Verify documentation, a Purchase Order will be issued and installation scheduled.

B. Woodshire Lane Paving

Mr. Schumacher reported:

- Forest Lakes roads are in County inventory but not maintained by the County.
- He met with Pavement Maintenance, Inc. (PMI) and the Public Utilities Department to review the roadways and scope the project.
- In accordance with the *Asphalt Maintenance and Related Services Contract,* Pavement Maintenance, Inc. (PMI) submitted estimates for the Woodshire Lane paving project.
    1. Estimate # MAC25-011, dated January 17, 2025, in the amount of $94,492.60, to mill and re-surface Woodshire Lane and install pavement markers.
    2. Estimate #MAC25-013, dated January 27, 2025, in the amount of $14,640.20 to mill, re-surface, and install markers on Forest Lakes Drive.

- Committee discussion ensued. Mr. Schumacher noted that the first section of Woodshire Lane by Emerald Greens is owned by the County. The Road Maintenance Division will be responsible for paving the area at the time it is deemed necessary.
- Work is anticipated in the first quarter of 2025.

Chair Pollock motioned to approve Preferred Maintenance Inc's Estimate number MAC25-011, dated January 17, 2025, in the amount of $94,492.60 to mill, re-surface and install pavement markers on Woodshire Lane and Estimate # MAC25-013, dated January 27, 2025, in the amount of $14,640.20 to mill, re-surface and install pavement markers on Forest Lakes Drive. Second by Mr. Bernal. Carried unanimously 4 – 0.

C. Woodshire Trees & Palms

- Approximately six (6) failing trees or palms along Woodshire Ln were removed by the Fairways at Emerald Greens condominiums in preparation for the paving project.

D. Shopping Center Screening - Hedge & Fence

Mr. Schumacher reported:

Landscape Installation

- The Ficus hedge and vegetation screening bordering the Pine Ridge Crossing Shopping Center and Woodshire Lane on the east boundary of the community has deteriorated.
- He requested remediation of the situation from Roger McGuinness, Kite Realty Group, noting that the irrigation system should be evaluated including running frequency (number of days per week) and water coverage volume.
- Code Enforcement will be consulted if the situation is not addressed.

Fence Installation Woodshire Lane/Pine Ridge Crossing Shopping Center

- The area between Woodshire Lane and the Pine Ridge Crossing Shopping Center houses utilities and a steep washed out roadway berm along Woodshire Lane, posing a safety risk to pedestrians cutting through between Woodshire Lane and the center.
- The fence running south of this area, along the shared property line, may be extended to The Crossings parking lot entrance off Woodshire Lane at the north end.
- Research revealed vinyl coated fencing is more durable, resistant to weather, fading, and staining and is resistant to rust or decomposition.
- A licensed land surveyor on contract with the County will be retained to survey the area.
- Upon installation of the fence extension, Ground Zero Landscaping will install a low block paver wall (approximately 15-foot length) along the base of the fence at the ravine, plus Bahia Grass sod to address erosion.

Mr. Schumacher will:

- Contract a licensed land surveyor on contract with the County to survey the area.
- Request quotes for a heavier gauge link fence, both galvanized and black vinyl coated, from Carter Fence Company.

Chair Pollock motioned to approve black vinyl coated fencing for installation along the shared property line area between Woodshire Lane and the Pine Ridge Crossing Shopping Center. Second by Vice Chair Thomson. Carried unanimously 4 – 0.

Code Complaint Filing
A resident of Woodshire Villas reported their Attorney filed a code complaint with the County stating that the hedge planted by Kite Realty Group on the shared property line with Pine Ridge Crossing, does not conform to code specifications.

Mr. Schumacher *requested the complaint number be forwarded to him for reference.*

E. Lake 15 Wall Replacement

Mr. Schumacher reported:

- A baseline for a replacement lake retaining wall (seawall) has been received from a Marine supply company.
- The design does not utilize a poured cap, with the associated truck access.
- Upon completion of a final design, approval by a licensed structural engineer will be obtained to proceed.
- Project installation will be coordinated with the Quail Run Golf Club.

Mr. Burnham *reported that another retaining wall piling is failing on Lake 15.*

VIII. NEW BUSINESS

A. Quail Run Lakes - Riprap Replenishment

Mr. Schumacher reported:

- Quail Run Golf Club (QRGC) requested the MSTU provide riprap material for their lakes, with club Staff to perform the installation.
- A quote for riprap material, based on Mr. Burnham's tonnage estimate and stone size, will be solicited from PMI in accordance with the *Asphalt Maintenance and Related Services Contract.*
- As recommended by the County Attorney's office (CAO), the proposed cost sharing arrangement will be submitted to the Board of County Commissioners for approval.
- The proposal will be presented to the Committee for consideration.
- The project will be scheduled for April/May 2025.

IX. COMMITTEE MEMBER COMMENTS

Signage Maintenance – Forest Lakes Boulevard

- An upside-down speed sign and leaning "no outage" are to be reset.

Shrub Removal

- A thank you was extended to the Turtle Lakes Condominium Association for clearing Brazilian Pepper shrubs.

Debris Removal

- Hurricane debris in the vicinity of the outlet to Lake 5 has not been removed.

Lake Vegetation

- Plant growth, potentially Hydrilla, an invasive aquatic plant species, is present in Lakes 15 and 16.

Mr. Schumacher *will direct Mettauer Environmental to spray the aquatic plants during routine service.*

Asset Management Plan

- **Mr. Schumacher** will update the plan during the 2026 budget planning period.

X. PUBLIC COMMENTS
None

XI. ADJOURNMENT
There being no further business to come before the Committee, the meeting was adjourned by the Chair at 11:01 A.M.

FOREST LAKES ROADWAY AND DRAINAGE MSTU ADVISORY COMMITTEE

_____

Greg Pollock, Chair

The Minutes were approved by the Committee on _____,2025 as presented ____, or as amended ____.

https://www.collierptne.com/forest-lakes-roadway-drainage-advisory-committee/

NEXT MEETING: **MARCH 4, 2025 - 10:00 A.M.**
FOREST LAKES CONDO ASSOCIATION CLUBHOUSE
NAPLES, FL 34105
(239) 261-5497

Forest Lakes M.S.T.U.
Fund 1626
March 4, 2025

	FY-25	Vendor	Item	PO#	Budget	Commitments	Expenditures	Available
1	MILLAGE COLLECTED & INTEREST		MSTU Revenues		$ (1,268,800.00)	$ -	$ (1,135,638.20)	$ (133,161.80)
2	CARRY FORWARD		Unexpended Prior Year Funds		$ (2,504,100.00)	$ -	$ -	$ (2,504,100.00)
3	**ALL REVENUES**				**$ (3,772,900.00)**	**$ -**	**$ (1,135,638.20)**	**$ (2,637,261.80)**
4	ENG. FEES & OTHERS (631400)				$ 25,000.00	$ -	$ -	$ 25,000.00
5	INDIRECT COST REIMBURSE	Collier County	Indirect Cost	Direct Pay	$ 3,900.00	$ 1,950.00	$ 1,950.00	$ -
6	INTERDEPARTMENT PAYMENT	IGC#100474	30x30 Stop Sign @51 Forest Lakes Blvd				$ 50.75	$ (50.75)
		Ground Zero Landscaping	Non-Bid Schedule Items	4500233638		$ 2,280.00	$ 720.00	
		Ground Zero Landscaping	Landscape Incidentals	4500233638		$ 5,443.98	$ 9,556.02	
7	LANDSCAPE INCIDENTALS (634990)				$ 10,000.00	$ 7,723.98	$ 10,276.02	$ (8,000.00)
		Ground Zero Landscaping	Grounds Maintenance	4500233638		$ 43,717.00	$ 22,283.00	
8	OTHER CONTRACTUAL (634999)				$ 100,000.00	$ 43,717.00	$ 22,283.00	$ 34,000.00
		Pavement Maintenance	Concrete Sidewalks, Curbs	4500233648		$ 3,980.00	$ 21,020.00	
		Mettauer Environmental	Lakes Maintenance Maintenance	4500233643		$ 100.00	$ 2,875.00	
			Kasco Fountain Replacement	4500237453		$ 10,130.10		
9	OTHER CONTRACTUAL (639990)				$ 140,600.00	$ 14,210.10	$ 23,895.00	$ 102,494.90
10	ELECTRICITY	FPL	Electricity	4700005161	$ 13,500.00	$ 8,616.39	$ 4,883.61	$ 0.00
11	WATER & SEWER	City of Naples	Water - Reclaimed Irrigation	4700005192	$ 3,000.00	$ 2,480.20	$ 519.80	$ 0.00
12	INSURANCE GENERAL	Collier County	Insurance	Direct Pay	$ 600.00	$ 300.00	$ 300.00	$ -
13	SPRINKLER SYSTEM	SiteOne	Irrigation Parts & Pumps	4500235293	$ 1,500.00	$ 3,276.56	$ 223.44	$ (2,000.00)
14	MULCH				$ 1,000.00	$ -	$ -	$ 1,000.00
		Simmonds Electrical	Electrical Services	4500233651		$ 4,146.54	$ 5,853.46	
15	LIGHTING MAINTENANCE (646451)				$ 6,000.00	$ 3,580.64	$ 6,419.36	$ (4,000.00)
16	LICENSE & PERMITS				$ 2,000.00	$ -	$ -	$ 2,000.00
17		Premier Staffing	Transcription	4500234228		$ 2,146.30	$ 831.60	
18	OTHER MISCELLANEOUS (649990)				$ 3,000.00	$ 2,146.30	$ 831.60	$ 22.10
19	OFFICE SUPPLIES				$ 100.00	$ -	$ -	$ 100.00
20	COPYING CHARGES	J.M. Todd	Copier CPC	4500234730	$ 200.00	$ 81.73	$ 68.27	$ 50.00
21	FERT HERB CHEM				$ 500.00		$ -	$ 500.00
22	OTHER OPERATING				$ 300.00	$ -	$ -	$ 300.00
23	**OPERATING EXPENSES**				**$ 311,200.00**	**$ 88,082.90**	**$ 71,700.85**	**$ 151,416.25**
24	PTNE STAFF & DIVISION OVERHEAD				$ 72,600.00	$ -		$ 72,600.00
25	PROPERTY APPRAISER				$ 9,400.00	$ -	$ 4,542.60	$ 4,857.40
26	TAX COLLECTOR				$ 26,500.00	$ -	$ 24,051.19	$ 2,448.81
27	**COUNTY OVERHEAD**				**$ 108,500.00**	**$ -**	**$ 28,593.79**	**$ 79,906.21**
28	RESERVES FOR CAPITAL				$ 2,953,200.00	$ -	$ -	$ 2,953,200.00
29	RESERVES FOR ROADWAY REPAVING				$ 400,000.00	$ -	$ -	$ 400,000.00
30	**CAPITAL RESERVES**				**$ 3,353,200.00**	**$ -**	**$ -**	**$ 3,353,200.00**
31	**ALL EXPENSES**				**$ 3,772,900.00**	**$ 88,082.90**	**$ 100,294.64**	**$ 3,584,522.46**
32	**FY-25 BUDGET GRAND TOTAL**		= ALL REVENUES - ALL EXPENSES		**$ -**	**$ 88,082.90**	**$ (1,035,343.56)**	**$ 947,260.66**

Forest Lakes M.S.T.U.
Fund 1626
March 4, 2025

129,715,669	FY 13 Final Taxable Value	-2.4%		
129,977,881	FY 14 Final Taxable Value	0.2%		
140,171,072	FY 15 Final Taxable Value	7.8%		
152,711,783	FY 16 Final Taxable Value	8.9%		
165,722,702	FY 17 Final Taxable Value	8.5%		
190,428,196	FY 18 Final Taxable Value	14.9%		
202,132,375	FY 19 Final Taxable Value	6.1%		
210,299,015	FY 20 Final Taxable Value	4.0%		
219,999,549	FY 21 Final Taxable Value	4.6%		
227,701,198	FY 22 Final Taxable Value	3.5%		
257,799,765	FY 23 Final Taxable Value	13.2%	+7.0% Average	
294,456,887	FY 24 Final Taxable Value	14.2%		
$316,450,549	**FY 25 Gross Taxable Value**			
7.65%	**Adjustment FY 24 to FY 25**			
	FY 25 Gross MSTU Revenue	FY 24		
Millage	**4.0000**	4.0000	**4.0 mill cap**	
Tax Dollars	**$1,265,802**	$1,177,828	**$87,975**	**Increase**

Total Available Balance	**$ 3,584,522.46**
Plus Commited And Not Spent	**$ 88,082.90**
Estimated Cash	**$ 3,672,605.36**

Prepared 03.26.2025 TC

FOREST LAKES

ROADWAY AND DRAINAGE M.S.T.U. ADVISORY COMMITTEE

8300 Radio Road - Naples, FL 34104

MINUTES

FEBRUARY 4, 2025

I. CALL TO ORDER

Chair Pollock called the meeting to order at 10:00 A.M. Roll call was taken, and a quorum of four was present.

II. ATTENDANCE

Advisory Committee	Greg Pollock – Chair
	Kathy Thomson – Vice Chair
	Patrick Bernal
	Marianne Fanning (Excused)
	Jerry Norsic
Staff	Brian Wells – Director, PTNE (Excused)
	Dan Schumacher – Project Manager
	Rosio Garcia – Operations Coordinator (Excused)
Contractors	Aaron Gross - Ground Zero Landscaping
	Wendy Warren - Premier Staffing (Transcription)
Public Attendance	Doug Burnham – General Manager, QRGC
	Barbara Bell – Resident
	Paul Carletta - Resident
	Jack Hedenstrom - Resident
	Deborah Hestrup – Resident
	Rick Korb - QRGC
	Russell Peter – Resident
	Steve Thomson - Resident
	Stacie Young – Resident

III. APPROVAL OF AGENDA

Mr. Norsic moved to approve the February 4, 2025, Agenda of the Forest Lakes Roadway and Drainage Advisory Committee MSTU. Second by Vice Chair Thomson. Carried unanimously 4 - 0.

IV. APPROVAL OF MINUTES – January 7, 2025

Mr. Norsic moved to approve the minutes of the January 7, 2025, Forest Lakes MSTU Advisory Committee meeting subject to the following change:

- *Page 3,* Item VII-A Project Managers Report, Streetlamps, from "Simmonds Electrical replaced circuit breakers and lamp fixtures from the east end of Forest Lakes Boulevard to Woodshire Lane.) …," to …. Simmonds Electrical replaced circuit breakers and lamp fixtures from the east end of Forest Lakes Boulevard **from** Woodshire Lane ….).
- *Page 4,* Item VII-B Project Managers Report, 2025 Projects, from "6. RFQ - **Library** Lake #15 - Wall Repair Award for Installation.) …," to …. 6. RFQ - Lake 15 - Wall Repair Award for Installation …).
- *Page 6,* Item IX – Public Comments, Tree Replacement, from "Ground Zero Landscaping noted a sprinkler head interfered with the location of the golf course parking lot tree

damaged by an auto accident and did not recommend replacement.) …," to …. Ground Zero Landscaping noted **that the location of a golf course parking lot tree was destroyed by an auto accident and did not recommend replacement due to the location of a taller overhanging tree. An adjacent irrigation head will be disabled, as no longer needed** …).

Second by Mr. Bernal. Carried unanimously 4 – 0.

V. CONTRACTOR REPORTS

A. Ground Zero Landscaping

Mr. Schumacher and Mr. Gross reported:

- Landscaping is well trimmed and in good condition.
- Tree limbs interfering with light pole lamps were pruned.
- Flowers growing over the culvert on Woodshire Lane were cut back.
- Fertilizer will be applied in February.
- The irrigation system (not an MSTU asset) that waters the Ficus hedge and vegetation bordering the Pine Ridge Crossing Shopping Center and Woodshire Lane on the east boundary of the community is functioning. Ground Zero Landscaping will monitor the condition of the plantings.
- The replacement cap for the irrigation meter, received by SiteOne, will be installed by Ground Zero Landscaping.

Public Utility Easement

Mr. Schumacher noted:

- The east side entry from Pine Ridge Road onto Forest Lakes Boulevard has a ten-foot utility easement between the road and the single-family homes on Azalea Boulevard.
- Florida Power and Light is responsible for maintaining the area and providing screening/landscaping.

VI. PROJECT MANAGERS REPORT – Dan Schumacher

A. Budget Report

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Forest Lakes MSTU Fund 1626 Budget for February 4, 2025, prepared January 28, 2025.

Mr. Schumacher provided an overview of the budget highlighting:

- Purchase Orders
  1. City of Naples – reclaimed irrigation water.
  2. FPL – electricity.
  3. Ground Zero Landscaping – grounds maintenance
     a. Incidentals – landscape materials and refurbishment.
     b. Maintenance – regular landscape, swales & irrigation maintenance.
  4. Mettauer Environmental – lake weed control and aerator maintenance.
  5. Pavement Maintenance – concrete sidewalk curbs.
  6. Premier Staffing – transcription services.
  7. Simmonds Electrical – lighting & general electrical services.
  8. SiteOne Landscape Supply – irrigation parts and pumps.

- Budget Summary

a. Line 1, Revenue – Millage Collected and Interest budgeted at $1,268,800.
b. Line 2, Carry Forward – Unexpended Prior Year (2024) Funds 2,504,100.
c. Line 3, Revenue Total – A total of $3,772,900.
d. Line 23, Operating Expense – Of the $311,200 budgeted, $87,512 is committed to existing Purchase Orders and $62,140 is expended, leaving the remainder of $161,546 available within budget for additional operating expenses as needed.
e. Line 27, County Overhead – Of the $108,500 budgeted, $27,750 has been transferred and a balance of $80,743 remains for transfer. (PTNE Staff & support, Property Appraiser & Tax Collector).
f. Line 28, Reserves for Capital - A balance of $2,953,200 remains for improvement projects.
g. Line 29, Reserves for Roadway Paving – $400,000 of budgeted Capital Reserve funds are designated for roadway paving.
h. Line 29, Capital Reserves total balance is $3,353,200 (the combined total of Lines 27 and 28).
i. Line 30, All Expenses – Of the $3,772,900 budgeted, tabulated Commitments to existing Purchase Orders total $115,195 and $59,006 has been expended, leaving a remainder of $3,598,697 available for MSTU expenditures.
j. Unexpended funds will carryforward to the FY-26 budget.

- General
  a. MSTU Tax Rate: 4.0 Mills (0.4%) to maintain MSTU Roadways and Stormwater Drainage within the taxing district.
  b. The millage rate of 4.00 per $1,000 of Ad Valorem taxable value will be reviewed during the FY-26 Budget planning process.
  c. The Ad Valorem property tax value increased 7.65% for fiscal year 2025 over 2024 generating additional revenue of $87,975.
  d. Funds collected by the Forest Lakes MSTU cannot be utilized outside of the MSTU.

Mr. Schumacher noted:

Expenditures and Invoices Processed

- Expenditures can exceed the Budget if funds are available in in the Operating Expense Category for transfer.
- Pavement Maintenance, Inc.'s (PMI) invoice for the Woodshire Lane project was approved for payment.

Lake Maintenance

- Mettauer's contract for lake vegetation maintenance expires February 2026.
- A *Request for Quote* (RFQ) for Aquatic Vegetation Control and lake fountain repairs has been distributed to three vendors.
- The Lake 15 retaining wall repair will be funded from the "Reserves for Capital" category.

Streetlamps

- A roadway tour to identify street light outages will be undertaken.
- LED lamp replacements will be researched.

Asset Management Plan

- The *Capital Asset Plan* report, dated June 4, 2024, estimates life expectancies of MSTU assets and corresponding expenditure projections to fund maintenance.

- Assets include roadway pavement, stormwater drainage swales & structures, landscaping & irrigation, lake fountains & weed control, seawalls, sidewalks & lighting, and fencing.
- Entryway light maintenance and lamp replacement have been identified as an MSTU asset and will be incorporated into the plan.
- As of June 4, 2024, maintenance and repair estimates throughout 2028 total $2,140,995.
- The plan will be updated during the 2026 budget planning period.

Outdoor Lighting

Mr. Schumacher reported:

- Windham Studios provided the records for the layout of MSTU landscape lighting, noting Hannula Landscaping was awarded the contract.
- Hannula Landscaping & Irrigation, Inc. sub-contracted the entry lighting project to Outdoor Lighting Perspectives.
- Outdoor Lighting Perspectives located the files for the layout of the MSTU outdoor landscape lighting for the Palm trees on the entrance median.
- He determined the lighting maintenance and lamp replacement for the front entry sign are an MSTU responsibility.
- On receipt of E-Verify documentation, Outdoor Lighting Perspectives will be established as a County vendor and a Purchase Order issued.
- A cost proposal to repair the landscape lighting will be presented to the Committee at the March meeting.

VII. ONGOING BUSINESS

A. Lake 9 Fountain Replacement

Mr. Schumacher reported:

Lake 9 Fountain Replacement

- Request for Quote (RFQ) documentation, Lump Sum, with specifications for a Kasco aerator fountain to be installed, was distributed with the Agenda.
- Proposals were received from Mettauer Environmental, Solitude Lake Management, and The Lake Doctors.
- The vendor selected agreed to release the "Terms & Conditions" cited in their proposal in accordance with the Procurement Division's and County Attorney's request.
- Contingent upon receipt of insurance and E-Verify documentation, a Purchase Order will be issued and installation scheduled.

B. Woodshire Lane Paving

Mr. Schumacher reported:

- Forest Lakes roads are in County inventory but not maintained by the County.
- He met with Pavement Maintenance, Inc. (PMI) and the Public Utilities Department to review the roadways and scope the project.
- In accordance with the *Asphalt Maintenance and Related Services Contract,* Pavement Maintenance, Inc. (PMI) submitted estimates for the Woodshire Lane paving project.
    1. Estimate # MAC25-011, dated January 17, 2025, in the amount of $94,492.60, to mill and re-surface Woodshire Lane and install pavement markers.
    2. Estimate #MAC25-013, dated January 27, 2025, in the amount of $14,640.20 to mill, re-surface, and install markers on Forest Lakes Drive.

- Committee discussion ensued. Mr. Schumacher noted that the first section of Woodshire Lane by Emerald Greens is owned by the County. The Road Maintenance Division will be responsible for paving the area at the time it is deemed necessary.
- Work is anticipated in the first quarter of 2025.

Chair Pollock motioned to approve Preferred Maintenance Inc's Estimate number MAC25-011, dated January 17, 2025, in the amount of $94,492.60 to mill, re-surface and install pavement markers on Woodshire Lane and Estimate # MAC25-013, dated January 27, 2025, in the amount of $14,640.20 to mill, re-surface and install pavement markers on Forest Lakes Drive. Second by Mr. Bernal. Carried unanimously 4 – 0.

C. Woodshire Trees & Palms

- Approximately six (6) failing trees or palms along Woodshire Ln were removed by the Fairways at Emerald Greens condominiums in preparation for the paving project.

D. Shopping Center Screening - Hedge & Fence

Mr. Schumacher reported:

Landscape Installation

- The Ficus hedge and vegetation screening bordering the Pine Ridge Crossing Shopping Center and Woodshire Lane on the east boundary of the community has deteriorated.
- He requested remediation of the situation from Roger McGuinness, Kite Realty Group, noting that the irrigation system should be evaluated including running frequency (number of days per week) and water coverage volume.
- Code Enforcement will be consulted if the situation is not addressed.

Fence Installation Woodshire Lane/Pine Ridge Crossing Shopping Center

- The area between Woodshire Lane and the Pine Ridge Crossing Shopping Center houses utilities and a steep washed out roadway berm along Woodshire Lane, posing a safety risk to pedestrians cutting through between Woodshire Lane and the center.
- The fence running south of this area, along the shared property line, may be extended to The Crossings parking lot entrance off Woodshire Lane at the north end.
- Research revealed vinyl coated fencing is more durable, resistant to weather, fading, and staining and is resistant to rust or decomposition.
- A licensed land surveyor on contract with the County will be retained to survey the area.
- Upon installation of the fence extension, Ground Zero Landscaping will install a low block paver wall (approximately 15-foot length) along the base of the fence at the ravine, plus Bahia Grass sod to address erosion.

Mr. Schumacher will:

- Contract a licensed land surveyor on contract with the County to survey the area.
- Request quotes for a heavier gauge link fence, both galvanized and black vinyl coated, from Carter Fence Company.

Chair Pollock motioned to approve black vinyl coated fencing for installation along the shared property line area between Woodshire Lane and the Pine Ridge Crossing Shopping Center. Second by Vice Chair Thomson. Carried unanimously 4 – 0.

Code Complaint Filing
A resident of Woodshire Villas reported their Attorney filed a code complaint with the County stating that the hedge planted by Kite Realty Group on the shared property line with Pine Ridge Crossing, does not conform to code specifications.

Mr. Schumacher *requested the complaint number be forwarded to him for reference.*

E. Lake 15 Wall Replacement

Mr. Schumacher reported:

- A baseline for a replacement lake retaining wall (seawall) has been received from a Marine supply company.
- The design does not utilize a poured cap, with the associated truck access.
- Upon completion of a final design, approval by a licensed structural engineer will be obtained to proceed.
- Project installation will be coordinated with the Quail Run Golf Club.

Mr. Burnham *reported that another retaining wall piling is failing on Lake 15.*

VIII. NEW BUSINESS

A. Quail Run Lakes - Riprap Replenishment

Mr. Schumacher reported:

- Quail Run Golf Club (QRGC) requested the MSTU provide riprap material for their lakes, with club Staff to perform the installation.
- A quote for riprap material, based on Mr. Burnham's tonnage estimate and stone size, will be solicited from PMI in accordance with the *Asphalt Maintenance and Related Services Contract.*
- As recommended by the County Attorney's office (CAO), the proposed cost sharing arrangement will be submitted to the Board of County Commissioners for approval.
- The proposal will be presented to the Committee for consideration.
- The project will be scheduled for April/May 2025.

IX. COMMITTEE MEMBER COMMENTS

Signage Maintenance – Forest Lakes Boulevard

- An upside-down speed sign and leaning "no outage" are to be reset.

Shrub Removal

- A thank you was extended to the Turtle Lakes Condominium Association for clearing Brazilian Pepper shrubs.

Debris Removal

- Hurricane debris in the vicinity of the outlet to Lake 5 has not been removed.

Lake Vegetation

- Plant growth, potentially Hydrilla, an invasive aquatic plant species, is present in Lakes 15 and 16.

Mr. Schumacher *will direct Mettauer Environmental to spray the aquatic plants during routine service.*

Asset Management Plan

- **Mr. Schumacher** will update the plan during the 2026 budget planning period.

X. PUBLIC COMMENTS
None

XI. ADJOURNMENT
There being no further business to come before the Committee, the meeting was adjourned by the Chair at 11:01 A.M.

FOREST LAKES ROADWAY AND DRAINAGE MSTU ADVISORY COMMITTEE

Greg Pollock

Greg Pollock, Chair

The Minutes were approved by the Committee on May 4 ,2025 as presented ____, or as amended X.

https://www.collierptne.com/forest-lakes-roadway-drainage-advisory-committee/

NEXT MEETING: **MARCH 4, 2025 - 10:00 A.M.**
FOREST LAKES CONDO ASSOCIATION CLUBHOUSE
NAPLES, FL 34105
(239) 261-5497

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

February 12, 2025

FOR IMMEDIATE RELEASE

Notice of Public Meeting
Golden Gate Beautification MSTU Advisory Committee
Collier County, Florida

February 18, 2025
4:30 p.m.

Notice is hereby given that the **Golden Gate Beautification Municipal Service Taxing Unit (MSTU) Advisory Committee** will meet on **Tuesday, February 18, 2025,** at **4:30 p.m.** at the Golden Gate Community Center, 4701 Golden Gate Parkway, Naples, Florida.

The agenda will be available on the Collier County Government website at https://www.collierptne.com/mtsu/golden-gate-beautification-advisory-committee/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Dan Schumacher at (239) 252-5775.

###

GOLDEN GATE BEAUTIFICATION M.S.T.U.

8300 Radio Road
Naples, FL 34104

FEBRUARY 18, 2025

I. CALL TO ORDER

II. ATTENDANCE

Advisory Committee	Patricia Spencer – Chair (10/06/2025)
	Paula Rogan – Vice Chair (10/06/2027)
	Florence "Dusty" Holmes (10/06/2025)
	Ron Jefferson (10/06/2026)
	- Committee Vacancy -
Staff	Brian Wells – PTNE Director
	Dan Schumacher – Project Manager
Contractors	Mike McGee – Landscape Architect (McGee & Assoc)
	Armando Ysaguirre – Grounds Maintenance (A&M Property Maint.)
	Wendy Warren – Transcription (Premier)
	Sharon Johnson – Sign Renovation (Lykins-Signtek)

III. PLEDGE OF ALLEGIANCE

IV. APPROVAL OF AGENDA

V. APPROVAL OF MINUTES – JANUARY 21, 2025

VI. LANDSCAPE MAINTENANCE REPORT – A&M PROPERTY MAINTENANCE

VII. LANDSCAPE ARCHITECT'S REPORTS – M^C GEE & ASSOCIATES

- **A. SUNSHINE Boulevard**
- **B. CORONADO Parkway & HUNTER Boulevard**
- **C. TROPICANA Boulevard**

VIII. PROJECT MANAGER'S REPORT

IX. BUDGET REPORT

X. Community Welcome Sign Renovation – Golden Gate Pkwy (west) – Status

XI. OLD BUSINESS

XII. NEW BUSINESS

- **A. Irrigation Extension - Pkwy Median 2 & New Bridge over Santa Barbara Canal**

XIII. PUBLIC COMMENTS

XIV. ADJOURNMENT

NEXT MEETING:
MARCH 18, 2024 – 4:30 PM
GOLDEN GATE COMMUNITY CENTER
4701 GOLDEN GATE PARKWAY
NAPLES, FL 34116



GOLDEN GATE M.S.T.U. ADVISORY COMMITTEE

8300 Radio Road
Naples, FL 34104
January 21, 2025

MINUTES

I. CALL TO ORDER
The meeting was called to order at 4:28 P.M. by Chair Spencer. Attendance was called and a quorum of three was established.

II. ATTENDANCE

Advisory Committee	Patricia Spencer – Chair
	Paula Rogan – Vice Chair (Excused)
	Florence "Dusty" Holmes
	Ron Jefferson
	- Committee Vacancy -
Staff	Brian Wells – PTNE Director (Excused)
	Dan Schumacher – Project Manager
Contractors	Mike McGee – Landscape Architect, McGee & Associates
	Armando Yzaguirre – Grounds Maintenance, A & M Property Maintenance
	Wendy Warren – Transcription, Premier

III. PLEDGE OF ALLEGIANCE
The Pledge of Allegiance was recited.

IV. APPROVAL OF AGENDA
Ms. Holmes moved to approve the Agenda of the Golden Gate MSTU Advisory Committee as presented. Second by Mr. Jefferson Carried unanimously 3 - 0.

V. APPROVAL OF MINUTES – December 17, 2024
Mr. Jefferson moved to approve the Golden Gate MSTU Advisory Committee meeting minutes of December 17, 2024, as presented. Second by Chair Spencer. Carried unanimously 3 - 0.

VI. LANDSCAPE MAINTENANCE REPORT – A & M Property Maintenance

Mr. Yzaguirre reported:

- Routine landscape maintenance services have been performed on all MSTU roadways.
- Refurbishment of the medians on Hunter Boulevard and Coronado Parkway is near completion.
- Plant material deficiencies have been identified and a proposal for additional plants/trees for Hunter, Coronado and Tropicana will be submitted to Mr. Schumacher.
- Irrigation issues continue to occur.

Mr. Schumacher reported:

Irrigation

- The irrigation system on Sunshine Boulevard is not functioning as intended.
- The Board of County Commissioners (BCC) has awarded a contract to Agricultural Services International, LLC for Irrigation Pump Station Maintenance, Repairs and Services**.**
- ASI will be retained to diagnose the system and recommend repairs and/or replacement of components and the pump.
- Naples Electric Motor Works (NEMW) previously installed an internal fan on the Variable Frequency Drive and determined the fittings on a pipe were leaking.
- Median plantings on Sunshine Boulevard will be installed upon the resolution of the irrigation issues.

Mulch

- A cost quote for mulch will be requested from Southeast Spreading and installation scheduled.

Tree Pruning

- Trimming of Palms and hardwood trees will be scheduled with Tree Scaping Of Naples, Inc.

VII. LANDSCAPE ARCHITECT'S REPORT – McGee & Associates

Mr. McGee summarized the January 7, 2025, observation report.
(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

A. Sunshine Boulevard
B. Coronado Parkway & Hunter Boulevard
C. Tropicana Boulevard

Comments

Mr. McGee reported:

All locations

- Mulch (County Brown) is recommended for all planting beds, applied upon completion of plant replacements.
- Irrigation zones where replacement plants have been installed need to have additional days and/or time added.

Sunshine Boulevard

- Review all Duckbill tree staking systems quarterly to determine if the cables and rubber straps need to be adjusted.
- Median areas are stressed due to irrigation not functioning. Plant replacements should be put on hold.

Coronado Parkway and Hunter Boulevard

- Irrigation zones where replacement plants have been installed need to have additional days and/or time added.
- Review Alexander Palms to ensure bubblers are positioned 12-inches off the edge of trunks and pinned to the ground.
- Confirmed Palms do not have Ganoderma.
- Remove dead fronds and stalks from Paroutis Palms clumps.
- Recommend Perennial Peanut beds have an application of 0-0-22-22S-11mg fertilizer and Legume Soil Inoculant quarterly.

Collier Boulevard Widening Phase III

The project is along Collier Boulevard between City Gate Boulevard North and Green Boulevard and involves widening Collier Boulevard from four to six lanes within the project limits. It includes realigning portions of the adjacent CR 951 Canal. The project is anticipated to complete design by mid-2025.

MSTU's participation in landscaping areas within the MSTU boundaries will be considered at a future meeting.

***Mr. Schumacher** will **extend an invitation to Pam Lulich**, Landscape Operations Manager, to attend an MSTU meeting to inform members of the status of landscape design for the Collier Boulevard project.*

Comments

Mr. Schumacher reported:

- Fertilizer for Perennial Peanut, 0-0-22-22S-11mg, will be ordered and application scheduled.
- Median plantings on Sunshine Boulevard will be installed on the resolution of the irrigation issues.
- Replacement cost for eleven (11) decorative light poles on Tropicana Blvd. medians will be evaluated with quotes to be solicited from manufacturers Lumec and Sternberg.

VIII. PROJECT MANAGER'S REPORT

Mr. Schumacher reported:

A. Budget Report

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Golden Gate MSTU Fund 1621 Budget for January 21, 2025, prepared January 13, 2025.

- Purchase Orders
  1. FPL - electricity.
  2. A & M Property Maintenance – ground maintenance.
     a. Incidentals – landscape plants, materials, and refurbishment.
     b. Maintenance – regular landscape & irrigation maintenance.
  3. Howard Fertilizer – fertilizer.
  4. Lykins-Signtek – "Welcome Sign"
  5. McGee & Associates – landscape architectural services.
  6. Naples Christmas Lighting – Holiday decorations.
  7. Naples Electric motor Works (NEMW) – pump station maintenance.
  8. Premier Staffing – transcription services.
  9. Simmonds Electrical – electrical maintenance and repairs.

10. SiteOne Landscape Supply – irrigation parts & components.
11. Southeast Spreading – mulch.
13. Tree Scaping of Naples – tree pruning and removal.

- Budget Summary
  1. Line 1, Ad Valorem Tax Collections & Interest – Of the $743,200 budgeted, $639,798 has been collected and $103,401 remains to be collected.
  2. Line 2, Carry Forward – Unspent funds accumulated from previous fiscal years and retained within the MSTU, in the amount of $2,006,206.
  3. All Revenues – Of the $2,749,406 budgeted, $639,798 has been collected leaving an available balance of $2,109,607 (the sum of lines 1 and 2) minus Expenditures.
  4. Line 21, Operating Expense – Of $384,906 budgeted, $180,719 is committed on MSTU-issued Purchase Orders and $53,119 has been spent, leaving the remainder of $151,067 available within budget for additional operating expenses as needed.
  5. Line 25, County Overhead – Of the $87,300 budgeted, $14,126 has been transferred, and a balance of $73,173 remains to be assessed (PTNE Staff & support, Property Appraiser, & Tax Collector).
  6. Line 27, Capital Projects – A balance of $2,277,200 remains for improvement projects.
  7. Line 27, All Expenses – Of $2,749,406 budgeted, $180,719 is committed to existing Purchase Orders, and $67,246 in total expenditures, leaving a remainder of $2,501,440 available for MSTU expenditures.

- General
  a. MSTU Tax Rate: 0.5000 Mills (0.05%) for beautification improvements and maintenance within the taxing district is reviewed annually.
  b. Funds not spent in 2025 (FY-25) will be carried forward into FY-26.
  c. Tax millage and interest collected by the Golden Gate Beautification MSTU may only be utilized by the MSTU and within the MSTU district boundary.

Mr. Schumacher noted:

- The approved invoice for Naples Christmas Lighting is on the Board of County Commissioners (BCC) consent Agenda for payment.
- The proposed irrigation and landscape project on Golden Gate Parkway will be funded from the Capital Projects category.
- Uncommitted funds available within budget are eligible for transfer to other categories upon approval by the Committee.
- The Office of Budget Management (OMB) will be consulted regarding the addition of a note in the FY-26 budget to identify $150,000 in the Capital Improvements category dedicated to funding expenses incurred for disaster/ catastrophic events, perhaps per MSTU roadway.
- The *Asset Management Plan* report to estimate useful life of MSTU assets and corresponding expenditure projections to fund maintenance will be updated during the 2026 budget planning process.
- The Ad Valorem taxable value within the MSTU increased 8.94% for fiscal year 2025 over 2024 generating additional revenue of $129,275.

B. Community Welcome Sign Renovation – Golden Gate Parkway (west)

Mr. Schumacher reported:

- The Committee approved the sign design at the October 15, 2024, meeting.
- Lykins Signtek confirmed the sign will be finished week ending January 25th.
- He will inspect the sign prior to installation to confirm color application is consistent with the colors selected.
- The sign mounting standards and hardware will be prepped and painted on site prior to the sign installation.
- A new landscape light will be installed.

IX. OLD BUSINESS

None

X. NEW BUSINESS

A. Irrigation Extension - Pkwy Median 2 & New Bridge over Santa Barabara Canal

Mr. Schumacher reported:

- The Road Maintenance Division is considering restoration of the irrigation and landscaping at the intersection of Santa Barbara Blvd. and Golden Gate Parkway, west of the sign.
- The original irrigation lateral pipes were previously severed and capped, and irrigation heads disconnected during a County project in the area.
- Irrigation is necessary on both east and west sides of the bridge. Everything is already in place on the west side, whereas the east side requires piping and sprinkler heads.
- The irrigation line installation labor segment of the project is expected to go out for bid with anticipated installation in 2025.
- The County will supply parts for the project.
- Plants will be selected upon project completion for installation in spring 2025. TRUE?
- The MSTU has offered to share the cost of the project with the County.
- Upon installation, Road Maintenance Division will be responsible for maintaining the subject improvements.

Mr. Schumacher *will consult Pam Lulich, Landscape Operations Manager, to review the project. and extend an invitation for a department representative to attend an MSTU meeting.*

XI. COMMITTEE MEMBER COMMENTS

Holiday Decorations 2026

- Plans for Holiday Decorations in the Right-of-Way (ROW) on Golden Parkway, at the intersection of Santa Barbara Boulevard, will be addressed in June 2026.
- A full-size Christmas tree design of multi-color lights utilizing the flagpole will be considered.
- The replacement Welcome Sign will be prominently incorporated into the design.

Streetlamps

- The light pole on Coronado Parkway with blinking lamps will be identified and reported to FPL.

Sidewalk Restoration

- In a Golden Gate Civic Association meeting, discussion noted the sidewalk on Coronado Parkway will be restored with asphalt upon completion of the County's Public Utility project.

XII. ADJOURNMENT

There being no further business to come before the Committee, the meeting was adjourned by the Chair at 5:17 P.M.

GOLDEN GATE MSTU ADVISORY COMMITTEE

_____

Patricia Spencer, Chair

The Minutes were approved by the Committee on _____,2025 as presented _____ or as amended ____.

https://www.collierptne.com/mtsu/golden-gate-beautification-advisory-committee/

NEXT MEETING: **FEBRUARY 18, 2025 – 4:30 PM**
GOLDEN GATE COMMUNITY CENTER
4701 GOLDEN GATE PARKWAY
NAPLES, FL 34116

McGee & Associates
Landscape Architecture

Project: GOLDEN GATE BEAUTIFICATION, M.S.T.U.
Location: Sunshine Blvd.
Project Manager: Dan Schumacher, Collier County Public Services Department, Public Transportation & Neighborhood Enhancements Division
Consultant: McGee & Associates
Landscape Contractor: A & M Property Management
Observation Date: 2/4/2025

Landscape Architect Report: February 2025
Consultant's Representative: Michael A. McGee, rla, isa
Contractor's Representative: Armando Yzaguirre
Report Date: 2/4/2025
Report No.: 4 (FY-25)

AC - Indicates major items recommended to be discussed by Advisory Committee **S** - Indicates items recommended to be addressed by staff, **C** - Indicates items recommended to be addressed by Contractor

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					MONTHLY ADDRESSED	Yellow - Items recommended to be addressed as soon as possible or renovation recommendations generally based upon vehicular or storm damage.
All locations		X	X		All areas are heavily water stressed due to irrigation system not functioning. All replacement plantings must be put on hold.	
Median #1		X	X		South End: South tip of Juniper bed has 3-4 dead Juniper plants that need to be removed. Apparent decline would be contributed water stress, but spider mites and/or a blight may also have contributed.	
		X	X	12	North End: The Blueberry flax lily bed has lost over 50% of the plants. It is recommended at this point to remove the remaining flax lilies and renovate the bed with a different plant. Install (52) 2 gal., Zamia pumila – Coontie on 3 ft. centers 3 ft. off tree trunks, back of curbs and turf edges.	
		X	X	14	North end: Previous replacement Sabal palm has died and needs to be replaced. Match existing. This type of palm will require (2) bubblers and additional hand watering to survive its planting.	
		X	X	15	North end: (13) Juniper parsonii 3 gal. that need to be replanted as replacements.	
		X	X	15	Sand cordgrass bed: The bed has (6) plants are dead or missing and need to be replaced with 3 gal. size Sand cordgrass plants.	
		X	X	15	South end: (9) Juniper replacement plants have declined and/or dead due to sever water stress. Replant with 3 gal. Juniper parsonii.	
		X	X	15	Middle Bed: Yellow African iris plants (4) plant declined and/or dead. Replant with 1 gal. Yellow African iris.	
Median #2		X		9	At address 2224: A previously planted Tabebuia tree in the turf area at some point was removed and not replaced. It is recommended to install a Floss Silk tree. (Ceiba Speciosa 11'-13' Ht., 3.5 Cal., 5'-6' Spr., 36" dia. B&B or 65 Gal. size container.	
		X	X	15	South end: Area of previous auto damaged Juniper need to be renovated. Remove damaged or dead plants and install double row of (26) 3 gal. Juniper parsoni.	
		X	X	15	At address 2248: (10) renovation Yellow African Iris have declined and need to be replaced. Remove volunteer Blueberry Flax plants in Iris.	M&A 5/7/24: Remove volunteer Firangi Pangi tree in Iris bed.
		X	X	15	At address 2184: (1) Tabebuia Ipe has been removed. It is recommended to replant with the same Tabebuia Ipe tree. 11'-13' Ht., 3.5 Cal., 5'-6' Spr., 36" dia. B&B or 65 Gal. size container.	M&A 3/7/23: The tree planted at this location was a Yellow/Silver Trumpet tree and not an Ipe or Purple trumpet tree. Removal & replacement is recommended based upon trunk damage and the inability of this type of tree to become well rooted. In addition, the metal center support poles has not been removed after the installation of the Duckbill staking system. M&A 9/5/23: The tree has been blown over by the

GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Location: Sunshine Blvd.** **Report Date:** 2/4/2025 **Report No.:** 4 (FY25)

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
						recent winds. ~~The north duckbill anchor was installed about 12" not installed to its recommended 24" depth and as a result the tree pulled the anchor up.~~
		X	X	15	At address 2184: The Bougainvillea silhouettes are off color and are stunted in growth. Additional fertilization is highly recommended. Mulch should be pulled away from being in contact with the plant trunks.	M&A 2/8/23: (6) plants have declined and/or missing and need to be replaced. 3 gal. size. M&A 4/4/23: Plant count is now up to (10) plants and area is dry.
		X	X	15	At address 2160: (1) Tabebuia tree trunk has been girdled by staking straps. The girdling location has healed over but will remain a weak point for the main trunk. At this location an included bark branch union is present so reduce of this branch is recommended to reduce weight of the branch.	
		X	X	15	North End at 2052: Juniper parsoni have large amount of dead and brown foliage which appears to be result of insect (e.g. spider mites) or fungal disease. Contractor should review to treat issue and prune out dead foliage.	M&A 5/3/22: Contractor determined Juniper had a Blight disease and bed has been treated. Approx. 39-40 plants involved. M&A 12/6/22 (14) 3 gal. Juniper parsoni needed to finish replacements.
Median #3 - Pump Station Location- 5 hp, 6" well, VFD		X	X	9	At address 1944: Install (2) Dwarf Bougainvillea 'Helen Johnson' 3 gal. size.	
Median #4		X	X		No major issues observed.	
Median #5		X	X	15	(20+/-) renovation Blueberry flax plants have declined and need to be replaced. Issue appears to irrigation coverage. Install (20) 1 gal. Blueberry flax.	M&A 6/4/24: Based upon additional plants dying it is recommended the remaining Blueberry Flax lilies be removed and the area planted with Zamia. Install (25) 2 gal., Zamia pumila – Coontie on 3 ft. centers 3 ft. off tree trunks, back of curbs and turf edges.
Median #6		X	X	2	At address 1790 or South End: Juniper plantings have sustained vehicular damage as well as water stress causing approximately 50% of the Juniper plants to have dead foliage or entire plants are dead. It is recommended to remove all damaged and declined plants and then review for replacements or renovation.	
		X	X	4	At address 1740-1730: One Golden Tabebuia tree, flagged with white tape, has sever trunk issues due to unhealed previous pruning cuts and removal and replacement is recommended. Replace with Pink Trumpet tree, Handroanthus impetiginosus 11'-13' Ht., 3.5 Cal., 5'-6' Spr., 36" dia. B&B or 65 Gal. size container.	
		X	X	8	At address 1750 & 1760: ~~Prune back existing Bougainvillea to a 24 inch diameter.~~ Install (8) Dwarf Bougainvillea 'Helen Johnson' 3 gal. size.	
		X	X	14	At address 1720: Water stress has caused the decline of (~~13-15~~ 20) Iris plants that will need to be replaced with 3 gal. Yellow African iris plants.	M&A 6/4/24: Remove volunteer Blueberry Flax lilies.
		X	X	24	At address 1740: The Bougainvillea silhouettes are off color and are stunted in growth. Plants should be reviewed for irrigation coverage and additional fertilization. Mulch should be pulled away from being in contact with the plant trunks.	M&A 4/4/23: (~~26-30~~ 37) Bougainvillea plants have declined and/or dead. Recommended to remove all and replant bed with 3 gal. Bougainvillea 'Silhouettes'
18th Place SW Median	X	X			Recommendation: Remove all surface vegetation (Bougainvillea shrubs) and lower grade 3-inches. Install (7) 3 gal., Aechmea "Raspberry Bromeliad and mulch entire median with Rice Rock mulch to include filter cloth below Rice Rock mulch.	M&A 6/4/24: With rainy season approaching it is recommended preparations begin to renovate median as listed. M&A 11/5/24 with rainy season ending any replanting's will require truck watering at planting and for a period of establishment.
18th Ave. S.W. Median	X	X			Recommendation: Remove all surface vegetation and lower grade 3-inches. Install (8) 3 gal., Aechmea "Raspberry Bromeliad and mulch entire median with Rice Rock mulch to	M&A 6/4/24: With rainy season approaching it is recommended preparations begin to renovate median as

McGee & Associates
Landscape Architecture

GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Location: Sunshine Blvd.** **Report Date:** 2/4/2025 **Report No.:** 4 (FY25)

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					include filter cloth below Rice Rock mulch.	listed. M&A 11/5/24 with rainy season ending any replanting's will require truck watering at planting and for a period of establishment.
					QUARTERLY ADDRESSED	
Accent/Street Lighting		X	X	2	Accent light were on at 11:00 AM in medians #5 & 6.	
	X				It is recommended all lights be reviewed for cleaning or replacements if needed. Some fixtures appear to have hazy and/or dirty lenses which reduce light levels.	
Lighting Electric Meters & Irrigation Controller Electric Source Locations					Lighting Electric Meter 2271 Sunshine Blvd., 1 SUN, Alley off 23rd Ave. SW Lighting Electric Meter & Irrigation Controller Electric, 1995 Sunshine Blvd., 2 SUN, Alley off 20th PL. SW Lighting Electric Meter 4642 18th Pl. SW, 3 SUN, North R/W	
Fertilizations:			X		Refer to schedule.	
Irrigation:		X	X		Previous month water use total per WeatherTrak controller estimate 0 gallons. The irrigation system is not functioning properly. All areas are heavily water stressed.	

McGee & Associates
Landscape Architecture

Project: GOLDEN GATE BEAUTIFICATION, M.S.T.U.
Location: Coronado Parkway & Hunter Blvd.
Project Manager: Dan Schumacher, Collier County Public Services Department, Public Transportation & Neighborhood Enhancements Division
Consultant: McGee & Associates
Landscape Contractor: A & M Property Management
Observation Date: 2/4/2025

Landscape Architect Report: February 2025
Consultant's Representative: Michael A. McGee, rla, isa
Contractor's Representative: Armando Yzaguirre
Report Date: 2/4/2025
Report No.: 4 (FY-25)

AC - Indicates major items recommended to be discussed by Advisory Committee **S** - Indicates items recommended to be addressed by staff, **C** - Indicates items recommended to be addressed by Contractor

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					MONTHLY ADDRESSED	Yellow - Items recommended to be addressed as soon as possible or renovation recommendations generally based upon vehicular or storm damage. Red – Items if not immediately addressed will result in multiple plant loss.
Coronado Pkwy. - All locations		X			All areas need mulching now that replacement plantings have been installed.	
		X	X		It is recommended that all Perennial peanut plantings and replacement areas that are to remain shall have an application of 0-0-22-22S-11mg fertilizer and Legume Soil inoculant at 10 oz. per 100 s.f.	
	X	X			Recommended all paver areas be pressure washed and treated with "Wet & Forget" mold treatment spray.	
		X			Recommend reviewing all valve locations for green reflective markers that are missing.	
Median #1- Pavers		X			Pressure cleaning recommended	
Median #2- Pavers		X			Pressure cleaning recommended	
Median #3		X	X		No major issues observed	
Median #4		X	X		No major issues observed	
Median #5		X	X		No major issues observed	
Median #6		X	X		No major issues observed	
Median #7		X		8	Remove and herbicide volunteer Strangler Fig vine in Sabal palm trunk.	
Median #8		X			No major issues observed	
Median #9 - Pavers		X			Pressure cleaning recommended	
Median #10		X	X	5	At address 5237 & 5254: Remove volunteer Scheffleras growing in palm trunks.	
		X	X	14	At address 5327 & 5273: (4) Paurotis palm clumps need to be pruned for thinning and removal of dead or declining stems.	
Median #11 Bridge		X	X		No major issues observed	
Median #12		X	X	5	Middle of median: Alexander palm has severe trunk fugus damage due to a previous wound. It is recommended the palm be replaced. Excavate palm and replant with (1) 10 ft. clear trunk Alexander palm.	
Median #13		X	X		No major issues observed	
Median #14		X	X	14	Repair 12 L.F. of paver border, remove & replace soldier course edge to include compacted base and mortar edging. Base shall extend 12-inches beyond current edge of pavers.	
Hunter Blvd. - All locations		X	X		All locations with perennial peanut planting shall have a Legume Soil Inoculant product applied as soon as possible, as well as an application of 0-0-22-22S-11mg fertilizer.	
	X	X			Recommended all paver areas be pressure washed and treated with "Wet & Forget" mold	

McGee & Associates
Landscape Architecture

GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Location:** Coronado Pkwy. & Hunter Blvd. **Report Date:** 2/4/2024 **Report No.:** 4 (FY25)

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					treatment spray.	
		X	X	4	Mulch needed for medians 1, 2, 3, 4, 5, 6 & eastern half of median 8.	M&A 10-1-24: Recommended mulch be placed in November following rainy and hurricane season. M&A 12/3/24: All areas should be mulched.
Median #1		X	X		No major issues observed	
Median #2		X	X		No major issues observed	
Median #3		X	X		No major issues observed	
Median #4		X	X	5	At address 2288: The 4th Alexander palm from the north end is in severe decline. No Gamoderma fungus conks were observed. Recommended to remove palm and then observe remaining palms before replacement.	
Median #5 **Pump station –** Median #5, 7.5 hp, 8" well feeds Hunter & Coronado, Hydropoint Controller in median		X	X		No major issues observed	
Median #6		X	X		No major issues observed	
		X	X	15	Median: (8) Paurotis palm clumps need to be pruned for thinning and removal of declining stems.	
		X	X	3	At address 2018: (1) Jatropha tree is missing. Replant with 6 ft. overall ht. multi-stem plant.	
Median #7		X	X		No major issues observed	
Median #8		X	X	11	At address 5290 & 5300: Paurotis palm clumps need dead fronds and stalks removed, as well as thinning. Review for disease and treat if needed.	
Median #9		X	X		No major issues observed	
Median #10		X	X	15	Apply Legume Soil Inoculant product as soon as possible, as well as an application of 0-0-22-22S-11mg fertilizer.	.
Median #11		X	X		No major issues observed	
Median #12		X	X	15	Median: Repair 12 L.F. of paver border, remove & replace soldier course edge to include compacted base and mortar edging. Base shall extend 12-inches beyond current edge of pavers.	
					QUARTERLY ADDRESSED	
Fertilization:		X	X		All locations with perennial peanut planting shall have a Legume Soil Inoculant product applied as soon as possible, as well as an application of 0-0-22-22S-11mg fertilizer.	.
		X	X		Refer to FY23-24 recommended schedule.	
General Irrigation:					Previous month water use total per WeatherTrak controller estimate 286,348 gallons.	

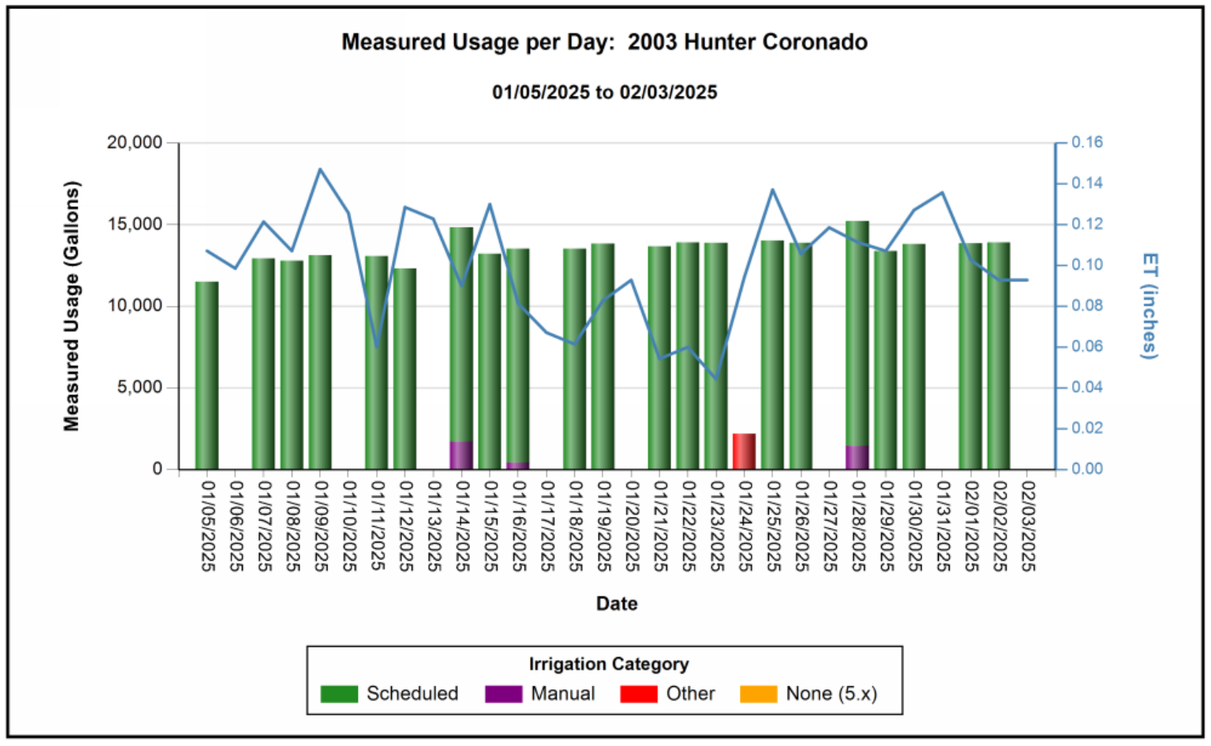
GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Location:** Coronado Pkwy. & Hunter Blvd. **Report Date:** 2/4/2024 **Report No.:** 4 (FY25)

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS

Collier County
Site: Golden Gate MTSU
09105378 - 2003 Hunter Coronado

Single Controller
Measured Usage History Report

WeatherTRAK



McGee & Associates
Landscape Architecture

Project: GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Landscape Architect Report:** February 2025
Location: Tropicana Blvd.
Project Manager: Dan Schumacher, Collier County Public Services Department, Public Transportation & Neighborhood Enhancements Division
Consultant: McGee & Associates **Consultant's Representative:** Michael A. McGee, rla, isa
Landscape Contractor: A & M Property Management **Contractor's Representative:** Armando Yzaguirre
Observation Date: 2/4/2025 **Report Date:** 2/4/2025 **Report No.:** 4 (FY-25)

AC - Indicates major items recommended to be discussed by Advisory Committee **S** - Indicates items recommended to be addressed by staff, **C** - Indicates items recommended to be addressed by Contractor.

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					MONTHLY ADDRESSED	Yellow - Items recommended to be addressed as soon as possible or renovation recommendations generally based upon vehicular or storm damage.
All locations:		X			It is recommended all areas be mulched.	
	X	X			Recommended all paver areas be pressure washed and treated with "Wet & Forget" mold treatment spray.	
Median #1	X	X		13	Recommend renovation of Dwarf Jasmine plantings based upon poor performance at this location. Remove all surface vegetation and debris except for existing Bromeliads and replant area with (275) 1 gal. Liriope 'Big Blue'.	
Median #2		X	X	14	The existing quick coupler valve box is broken and deformed and needs to have the top box and lid removed and new ones installed.	
Pedestrian shelter at 31st Ave. SW		X			Pavers should be cleaned	
Median #3 Bridge		X	X	6	North end: On tip of median 3 Juniper have been runover and removal and replacement is recommended. (3) Juniper parsonii 3 gal. size.	
		X	X	15	South end: (5-8) Yellow African Iris in decline or missing. Replant with 3 gal. size.	
		X	X	14	North end: ~~Remove Blueberry Flax volunteers.~~	M&A 9/6/22: (3) Yellow African Iris in decline or missing. Replant with 3 gal. size. M&A 3/7/23 the number of replacements has increased to a total of (~~9~~ 12).
Median #4		X	X	2	North end: Remove volunteer Oyster plants and Asparagus fern in Juniper plants.	
		X	X	9	At address 3044: Irrigation head is leaning. Recommend remove and install Rainbird 1812 16" ht. pop-up spray head set flush with grade.	
		X	X	9	At address 2860: Install (2) White African Iris 3 gal. size	
		X	X	9	At address 2672: Install (3) White African Iris 3 gal. size	
		X	X	9	At address 2896: Install (1) White African Iris 3 gal. size	
		X	X	15	At address 2930: Recommend removing two Crape myrtles and replace with (2) Crape Myrtle 'Natchez', White, 30 gal., 2" cal., 8'-10' ht., 5'-6' spr., Multi-stem (4 min.). Will require (1) bubbler location with (2) adjustable flood bubblers per tree.	
Pedestrian Shelter- 28th Ave. SW		X			Pavers should be cleaned	
Median #5		X	X	2	At address 2672: (4) White African Iris missing. Install (4) 3 gal. size.	
		X	X	13	At address 2672: Holly tree has totally defoliated, and main trunk bark is cracking. Decline would contribute to mature age of 16+/- years and past site conditions. Recommendation is to schedule removal by excavation and replant with Ilex x attenuate – East Palatka Holly 10' Ht., 3' spr., 3.5" cal. in 65 gal. container	
		X	X	14	At address 2600-2582: Holly tree has totally defoliated, root system is rotting, main trunk	

GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Location:** Tropicana Blvd. **Report Date:** 2/4/2025 **Report No.:** 4 (FY-25)

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					has severe rot due to previous pruning wounds not compartmentalizing and healing over. Recommendation is to schedule removal by excavation and replant with Ilex x attenuate – East Palatka Holly 10' Ht., 3' spr., 3.5" cal. in 65 gal. container	
		X	X	14	At address 2654: (3) White African Iris missing, replant with 3 gal. size.	
		X	X	14	At address 2578: (3) White African Iris in decline, replant with 3 gal. size.	
		X	X	14	At address 2520: ~~Remove volunteer Crape myrtles growing in Bougainvillea bed.~~	M&A 11/7/22: it is recommended due to the amount of shade over this planting location that the existing Bougainvillea and Crape myrtle sprouts be removed, and the area planted with Bromeliads. (45) Neoregelia carolinae 'Tricolor', 6" pots, 24" o.c.+/-, first row 4' off back of curb. M&A 9/5/23: It appears carpe myrtle sprouts have been treated with herbicide.
		X		2	At address 2600: Recommend Oak, 18" caliper, 50% damaged in main trunk from broken off large branch be monitored yearly.	M&A 6/6/23: This Oak is adjacent to the declined Holly tree at address 2701 that is being recommended for removal and replacement. It is recommended that this Oak tree be coordinated for removal by excavation and replace with Quercus virginiana 'Cathedral' 11'-13' ht., 3.5 cal., 5' spr. 36" dia. root ball or 65 gal. container.
Median #6 (Pavers only)		X	X		No major issue observed. Recommended pavers be pressure washed and treated with "Wet & Forget" mold treatment spray.	
					QUARTERLY ADDRESSED	
Accent/Street Lighting		X		5	Multiple accent lighting fixtures appear to have corroded metal edges and hazy and/or dirty lenses which reduce light levels. It is recommended all lights be reviewed for cleaning or replacements if needed.	
		X		5	Median #1 south light pole fixture has been turned out of alignment with the median.	
Lighting Disconnect & Sensor Locations					East R/W between 13th Ave. & PL. Lighting Disconnect & Sensor West Alley off 28th Ave. SW Lighting Disconnect & Sensor West R/W in Alley between G.G. Pkwy. & 26th PL. SW, Lighting Disconnect & Sensor West R/W at corner of 30th PL. SW & Tropicana Lighting Disconnect & Sensor	
Fertilizations:		X	X		Refer to schedule to be developed with Contractor.	
Irrigation:		X			Previous month water use total per WeatherTrak controller estimate 337,104 gallons.	

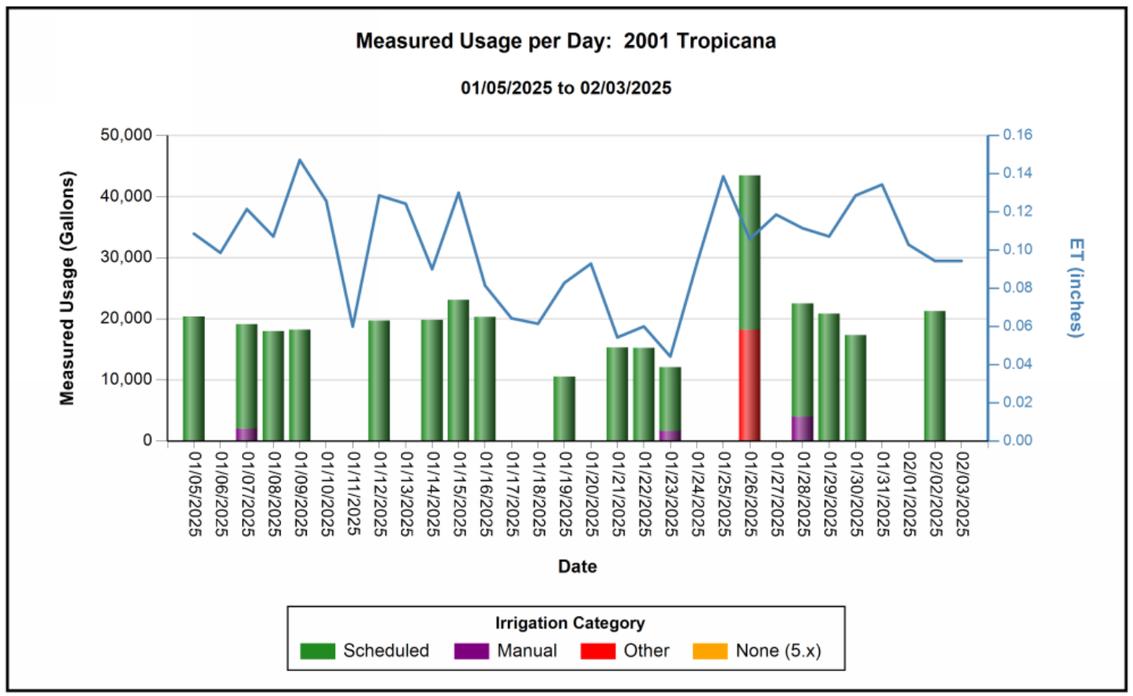
GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Location:** Tropicana Blvd. **Report Date:** 2/4/2025 **Report No.:** 4 (FY-25)

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS

Collier County
Site: Golden Gate MTSU
09012040 - 2001 Tropicana

Single Controller
Measured Usage History Report

WeatherTRAK



Golden Gate M.S.T.U.
Fund 1621
January 21, 2025

	FY-25	Vendor	Item	PO#	Budget	Commitments	Expenditures	Available
1	MILLAGE COLLECTED & INTEREST		MSTU Revenues		$ (743,200.00)	$ -	$ (660,238.31)	$ (82,961.69)
2	CARRY FORWARD		Unexpended Prior Year Funds		$ (2,006,206.25)	$ -	$ -	$ (2,006,206.25)
	ALL REVENUES				**$ (2,749,406.25)**	**$ -**	**$ (660,238.31)**	**$ (2,089,167.94)**
		McGee & Associates	Landscape Architect (FY-25)	4500234204		$ 20,943.35	$ 5,136.65	
		McGee & Associates	Landscape Architect (FY-24)	4500228494		$ -	$ 1,308.30	
3	ENG. FEES & OTHERS (631403)				$ 34,758.25	$ 20,943.35	$ 6,444.95	$ 7,369.95
4	INDIRECT COST REIMBURSE (634970)	Collier County	Indirect Cost	Direct Pay	$ 4,700.00	$ 2,350.00	$ 2,350.00	$ -
		A&M Property Maintenance		4500233652		$ 34,175.00	$ 825.00	
5	LANDSCAPE INCIDENTALS (634990)				$ 30,000.00	$ 34,175.00	$ 825.00	$ (5,000.00)
		A&M Property Maintenance		4500233652		$ 69,900.00	$ 45,100.00	
6	OTHER CONTRACTUAL (634999)				$ 222,000.00	$ 69,900.00	$ 45,100.00	$ 107,000.00
		Tree Scaping	Tree & Palm - Pruning	4500234124		$ 15,000.00	$ -	
		Tree Scaping	Tree & Palm - Removal	4500235294		$ 5,000.00	$ -	
		Naples Electric Motor Works	Pump Station Services	4500234617		$ 3,000.00	$ -	
		Lykins Signtek & Development	Welcome Sign	4500232891		$ 6,548.00	$ -	
7	OTHER CONTRACTUAL (639990)				$ 36,548.00	$ 29,548.00	$ -	$ 7,000.00
8	ELECTRICITY (643100)	FPL	Electricity	4700005162	$ 3,500.00	$ 2,415.57	$ 1,084.43	$ (0.00)
9	INSURANCE GENERAL(645100)	Collier County	Insurance	Direct Pay	$ 600.00	$ 300.00	$ 300.00	$ -
12	SPRINKLER SYSTEM(646311)	SiteOne	Irrigation Parts & Pumps	10330453	$ 10,000.00	$ 4,217.41	$ 782.59	$ 5,000.00
13	MULCH(646318)	Southeast Spreading			$ 25,000.00	$ -	$ -	$ 25,000.00
		Simmonds Electrical	Electrical Services	4500234109		$ 5,000.00	$ 23.59	
14	LIGHTING MAINTENANCE(646451)				$ 5,000.00	$ 5,000.00	$ 23.59	$ (23.59)
15	LICENSE & PERMITS(649010)				$ 2,000.00	$ -	$ -	$ 2,000.00
		Premier Staffing	Transcription	4500234229		$ 2,265.10	$ 712.80	
		Naples Christmas Lighting DBA Sight	Holiday Decorations	4500234277		$ -	$ 2,975.00	
16	OTHER MISCELLANEOUS (649990)				$ 5,000.00	$ 2,265.10	$ 3,687.80	$ (952.90)
17	OFFICE SUPPLIES (651110)				$ 100.00	$ -	$ -	$ 100.00
18	COPYING CHARGES(651210)	J.M. Todd	Copier CPC	4500234730	$ 200.00	$ 81.73	$ 68.27	$ 50.00
19	FERT HERB CHEM(652310)	Howard Fertilizer		4500234102	$ 5,000.00	$ 398.00	$ 1,602.00	$ 3,000.00
20	OTHER OPERATING (652990)				$ 500.00	$ -	$ -	$ 500.00
21	**OPERATING EXPENSES**				**$ 384,906.25**	**$ 171,594.16**	**$ 62,268.63**	**$ 151,043.46**
22	PTNE STAFF & DIVISION OVERHEAD (911011)				$ 67,400.00	$ -	$ -	$ 67,400.00
23	PROPERTY APPRAISER (930600)				$ 5,400.00	$ -	$ 2,637.08	$ 2,762.92
24	TAX COLLECTOR (930700)				$ 14,500.00	$ -	$ 13,108.21	$ 1,391.79
25	**COUNTY OVERHEAD**				**$ 87,300.00**	**$ -**	**$ 15,745.29**	**$ 71,554.71**
26	IMPROVEMENTS GENERAL (763100)				$ 2,277,200.00	$ -	$ -	$ 2,277,200.00
27	**CAPITAL PROJECTS**				**$ 2,277,200.00**	**$ -**	**$ -**	**$ 2,277,200.00**
27	**ALL EXPENSES**				**$ 2,749,406.25**	**$ 171,594.16**	**$ 78,013.92**	**$ 2,499,798.17**
28	**FY-25 BUDGET GRAND TOTAL**		= ALL REVENUES - ALL EXPENSES		**$ -**	**$ 171,594.16**	**$ (582,224.39)**	**$ 410,630.23**

Golden Gate M.S.T.U.
Fund 1621
January 21, 2025

516,253,177	FY 13 Final Taxable Value	7.8%		
533,888,677	FY 14 Final Taxable Value	3.4%		
575,541,732	FY 15 Final Taxable Value	7.8%		
611,031,317	FY 16 Final Taxable Value	6.2%		
673,743,701	FY 17 Final Taxable Value	10.3%		
749,340,700	FY 18 Final Taxable Value	11.2%		
813,136,298	FY 19 Final Taxable Value	8.5%		
885,583,987	FY 20 Final Taxable Value	8.9%		
987,248,891	FY 21 Final Taxable Value	11.5%		
1,067,233,321	FY 22 Final Taxable Value	8.1%		
1,214,827,173	FY 23 Final Taxable Value	13.8%	+9.1% Average	
1,351,201,209	FY 24 Final Taxable Value	11.2%		
$1,473,376,239	**FY 25 Gross Taxable Value**			
8.94%	**Adjustment FY 24 to FY 25**			
	FY 25 Gross MSTU Revenue	FY 24		
Millage	**0.5000**	0.5000	**0.5 mill cap**	
Tax Dollars	**$736,688**	$675,601	**$129,275**	**Increase**

Total Available Balance	**$**	**2,499,798.17**
Plus Commited And Not Spent	**$**	**171,594.16**
Estimated Cash	**$**	**2,671,392.33**

Prepared 02.11.2025 ZS

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

March 11, 2025

FOR IMMEDIATE RELEASE

Notice of Public Meeting
Golden Gate Beautification MSTU Advisory Committee
Collier County, Florida

March 18, 2025
4:30 p.m.

Notice is hereby given that the **Golden Gate Beautification Municipal Service Taxing Unit (MSTU) Advisory Committee** will meet on **Tuesday, March 18, 2025,** at **4:30 p.m.** at the Golden Gate Community Center, 4701 Golden Gate Parkway, Naples, Florida.

The agenda will be available on the Collier County Government website at https://www.collierptne.com/mtsu/golden-gate-beautification-advisory-committee/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Dan Schumacher at (239) 252-5775.

###

GOLDEN GATE BEAUTIFICATION M.S.T.U.

8300 Radio Road
Naples, FL 34104

MARCH 18, 2025

I. CALL TO ORDER

II. ATTENDANCE

Advisory Committee	Patricia Spencer – Chair (10/06/2025)
	Paula Rogan – Vice Chair (10/06/2027)
	Florence "Dusty" Holmes (10/06/2025)
	Ron Jefferson (10/06/2026)
	- Committee Vacancy -
Staff	Brian Wells – PTNE Director
	Dan Schumacher – Project Manager
Contractors	Mike McGee – Landscape Architect (McGee & Assoc)
	Armando Yzaguirre – Grounds Maintenance (A&M Property Maint.)
	Wendy Warren – Transcription (Premier)

III. PLEDGE OF ALLEGIANCE

IV. APPROVAL OF AGENDA

V. APPROVAL OF MINUTES – JANUARY 21, 2025

VI. LANDSCAPE MAINTENANCE REPORT – A&M PROPERTY MAINTENANCE

VII. LANDSCAPE ARCHITECT'S REPORTS – M^{C}GEE & ASSOCIATES

- **A. SUNSHINE Boulevard**
- **B. CORONADO Parkway & HUNTER Boulevard**
- **C. TROPICANA Boulevard**

VIII. PROJECT MANAGER'S REPORT

IX. BUDGET REPORT

X. OLD BUSINESS

XI. NEW BUSINESS

- **A. Irrigation Extension - Pkwy Median 2 & New Bridge over Santa Barbara Canal**
- **B. Sunshine Irrigation Pump Station**

XII. PUBLIC COMMENTS

XIII. ADJOURNMENT

NEXT MEETING:
APRIL 15, 2025 – 4:30 PM
GOLDEN GATE COMMUNITY CENTER
4701 GOLDEN GATE PARKWAY
NAPLES, FL 34116



GOLDEN GATE M.S.T.U. ADVISORY COMMITTEE

8300 Radio Road
Naples, FL 34104
January 21, 2025

MINUTES

I. CALL TO ORDER
The meeting was called to order at 4:28 P.M. by Chair Spencer. Attendance was called and a quorum of three was established.

II. ATTENDANCE

Advisory Committee	Patricia Spencer – Chair
	Paula Rogan – Vice Chair (Excused)
	Florence "Dusty" Holmes
	Ron Jefferson
	- Committee Vacancy -
Staff	Brian Wells – PTNE Director (Excused)
	Dan Schumacher – Project Manager
Contractors	Mike McGee – Landscape Architect, McGee & Associates
	Armando Yzaguirre – Grounds Maintenance, A & M Property Maintenance
	Wendy Warren – Transcription, Premier

III. PLEDGE OF ALLEGIANCE
The Pledge of Allegiance was recited.

IV. APPROVAL OF AGENDA
Ms. Holmes moved to approve the Agenda of the Golden Gate MSTU Advisory Committee as presented. Second by Mr. Jefferson Carried unanimously 3 - 0.

V. APPROVAL OF MINUTES – December 17, 2024
Mr. Jefferson moved to approve the Golden Gate MSTU Advisory Committee meeting minutes of December 17, 2024, as presented. Second by Chair Spencer. Carried unanimously 3 - 0.

VI. LANDSCAPE MAINTENANCE REPORT – A & M Property Maintenance

Mr. Yzaguirre reported:

- Routine landscape maintenance services have been performed on all MSTU roadways.
- Refurbishment of the medians on Hunter Boulevard and Coronado Parkway is near completion.
- Plant material deficiencies have been identified and a proposal for additional plants/trees for Hunter, Coronado and Tropicana will be submitted to Mr. Schumacher.
- Irrigation issues continue to occur.

Mr. Schumacher reported:

Irrigation

- The irrigation system on Sunshine Boulevard is not functioning as intended.
- The Board of County Commissioners (BCC) has awarded a contract to Agricultural Services International, LLC for Irrigation Pump Station Maintenance, Repairs and Services**.**
- ASI will be retained to diagnose the system and recommend repairs and/or replacement of components and the pump.
- Naples Electric Motor Works (NEMW) previously installed an internal fan on the Variable Frequency Drive and determined the fittings on a pipe were leaking.
- Median plantings on Sunshine Boulevard will be installed upon the resolution of the irrigation issues.

Mulch

- A cost quote for mulch will be requested from Southeast Spreading and installation scheduled.

Tree Pruning

- Trimming of Palms and hardwood trees will be scheduled with Tree Scaping Of Naples, Inc.

VII. LANDSCAPE ARCHITECT'S REPORT – McGee & Associates

Mr. McGee summarized the January 7, 2025, observation report.
(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

A. Sunshine Boulevard
B. Coronado Parkway & Hunter Boulevard
C. Tropicana Boulevard

Comments

Mr. McGee reported:

All locations

- Mulch (County Brown) is recommended for all planting beds, applied upon completion of plant replacements.
- Irrigation zones where replacement plants have been installed need to have additional days and/or time added.

Sunshine Boulevard

- Review all Duckbill tree staking systems quarterly to determine if the cables and rubber straps need to be adjusted.
- Median areas are stressed due to irrigation not functioning. Plant replacements should be put on hold.

Coronado Parkway and Hunter Boulevard

- Irrigation zones where replacement plants have been installed need to have additional days and/or time added.
- Review Alexander Palms to ensure bubblers are positioned 12-inches off the edge of trunks and pinned to the ground.
- Confirmed Palms do not have Ganoderma.
- Remove dead fronds and stalks from Paroutis Palms clumps.
- Recommend Perennial Peanut beds have an application of 0-0-22-22S-11mg fertilizer and Legume Soil Inoculant quarterly.

Collier Boulevard Widening Phase III

The project is along Collier Boulevard between City Gate Boulevard North and Green Boulevard and involves widening Collier Boulevard from four to six lanes within the project limits. It includes realigning portions of the adjacent CR 951 Canal. The project is anticipated to complete design by mid-2025.

MSTU's participation in landscaping areas within the MSTU boundaries will be considered at a future meeting.

***Mr. Schumacher** will **extend an invitation to Pam Lulich**, Landscape Operations Manager, to attend an MSTU meeting to inform members of the status of landscape design for the Collier Boulevard project.*

Comments

Mr. Schumacher reported:

- Fertilizer for Perennial Peanut, 0-0-22-22S-11mg, will be ordered and application scheduled.
- Median plantings on Sunshine Boulevard will be installed on the resolution of the irrigation issues.
- Replacement cost for eleven (11) decorative light poles on Tropicana Blvd. medians will be evaluated with quotes to be solicited from manufacturers Lumec and Sternberg.

VIII. PROJECT MANAGER'S REPORT

Mr. Schumacher reported:

A. Budget Report

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Golden Gate MSTU Fund 1621 Budget for January 21, 2025, prepared January 13, 2025.

- Purchase Orders
  1. FPL - electricity.
  2. A & M Property Maintenance – ground maintenance.
     a. Incidentals – landscape plants, materials, and refurbishment.
     b. Maintenance – regular landscape & irrigation maintenance.
  3. Howard Fertilizer – fertilizer.
  4. Lykins-Signtek – "Welcome Sign"
  5. McGee & Associates – landscape architectural services.
  6. Naples Christmas Lighting – Holiday decorations.
  7. Naples Electric motor Works (NEMW) – pump station maintenance.
  8. Premier Staffing – transcription services.
  9. Simmonds Electrical – electrical maintenance and repairs.

10. SiteOne Landscape Supply – irrigation parts & components.
11. Southeast Spreading – mulch.
13. Tree Scaping of Naples – tree pruning and removal.

- Budget Summary
  1. Line 1, Ad Valorem Tax Collections & Interest – Of the $743,200 budgeted, $639,798 has been collected and $103,401 remains to be collected.
  2. Line 2, Carry Forward – Unspent funds accumulated from previous fiscal years and retained within the MSTU, in the amount of $2,006,206.
  3. All Revenues – Of the $2,749,406 budgeted, $639,798 has been collected leaving an available balance of $2,109,607 (the sum of lines 1 and 2) minus Expenditures.
  4. Line 21, Operating Expense – Of $384,906 budgeted, $180,719 is committed on MSTU-issued Purchase Orders and $53,119 has been spent, leaving the remainder of $151,067 available within budget for additional operating expenses as needed.
  5. Line 25, County Overhead – Of the $87,300 budgeted, $14,126 has been transferred, and a balance of $73,173 remains to be assessed (PTNE Staff & support, Property Appraiser, & Tax Collector).
  6. Line 27, Capital Projects – A balance of $2,277,200 remains for improvement projects.
  7. Line 27, All Expenses – Of $2,749,406 budgeted, $180,719 is committed to existing Purchase Orders, and $67,246 in total expenditures, leaving a remainder of $2,501,440 available for MSTU expenditures.

- General
  a. MSTU Tax Rate: 0.5000 Mills (0.05%) for beautification improvements and maintenance within the taxing district is reviewed annually.
  b. Funds not spent in 2025 (FY-25) will be carried forward into FY-26.
  c. Tax millage and interest collected by the Golden Gate Beautification MSTU may only be utilized by the MSTU and within the MSTU district boundary.

Mr. Schumacher noted:

- The approved invoice for Naples Christmas Lighting is on the Board of County Commissioners (BCC) consent Agenda for payment.
- The proposed irrigation and landscape project on Golden Gate Parkway will be funded from the Capital Projects category.
- Uncommitted funds available within budget are eligible for transfer to other categories upon approval by the Committee.
- The Office of Budget Management (OMB) will be consulted regarding the addition of a note in the FY-26 budget to identify $150,000 in the Capital Improvements category dedicated to funding expenses incurred for disaster/ catastrophic events, perhaps per MSTU roadway.
- The *Asset Management Plan* report to estimate useful life of MSTU assets and corresponding expenditure projections to fund maintenance will be updated during the 2026 budget planning process.
- The Ad Valorem taxable value within the MSTU increased 8.94% for fiscal year 2025 over 2024 generating additional revenue of $129,275.

B. Community Welcome Sign Renovation – Golden Gate Parkway (west)

Mr. Schumacher reported:

- The Committee approved the sign design at the October 15, 2024, meeting.
- Lykins Signtek confirmed the sign will be finished week ending January 25th.
- He will inspect the sign prior to installation to confirm color application is consistent with the colors selected.
- The sign mounting standards and hardware will be prepped and painted on site prior to the sign installation.
- A new landscape light will be installed.

IX. OLD BUSINESS

None

X. NEW BUSINESS

A. Irrigation Extension - Pkwy Median 2 & New Bridge over Santa Barabara Canal

Mr. Schumacher reported:

- The Road Maintenance Division is considering restoration of the irrigation and landscaping at the intersection of Santa Barbara Blvd. and Golden Gate Parkway, west of the sign.
- The original irrigation lateral pipes were previously severed and capped, and irrigation heads disconnected during a County project in the area.
- Irrigation is necessary on both east and west sides of the bridge. Everything is already in place on the west side, whereas the east side requires piping and sprinkler heads.
- The irrigation line installation labor segment of the project is expected to go out for bid with anticipated installation in 2025.
- The County will supply parts for the project.
- Plants will be selected upon project completion for installation in spring 2025. TRUE?
- The MSTU has offered to share the cost of the project with the County.
- Upon installation, Road Maintenance Division will be responsible for maintaining the subject improvements.

Mr. Schumacher *will consult Pam Lulich, Landscape Operations Manager, to review the project. and extend an invitation for a department representative to attend an MSTU meeting.*

XI. COMMITTEE MEMBER COMMENTS

Holiday Decorations 2026

- Plans for Holiday Decorations in the Right-of-Way (ROW) on Golden Parkway, at the intersection of Santa Barbara Boulevard, will be addressed in June 2026.
- A full-size Christmas tree design of multi-color lights utilizing the flagpole will be considered.
- The replacement Welcome Sign will be prominently incorporated into the design.

Streetlamps

- The light pole on Coronado Parkway with blinking lamps will be identified and reported to FPL.

Sidewalk Restoration

- In a Golden Gate Civic Association meeting, discussion noted the sidewalk on Coronado Parkway will be restored with asphalt upon completion of the County's Public Utility project.

XII. ADJOURNMENT

There being no further business to come before the Committee, the meeting was adjourned by the Chair at 5:17 P.M.

GOLDEN GATE MSTU ADVISORY COMMITTEE

_____

Patricia Spencer, Chair

The Minutes were approved by the Committee on _____,2025 as presented _____ or as amended ____.

https://www.collierptne.com/mtsu/golden-gate-beautification-advisory-committee/

NEXT MEETING: **FEBRUARY 18, 2025 – 4:30 PM**
GOLDEN GATE COMMUNITY CENTER
4701 GOLDEN GATE PARKWAY
NAPLES, FL 34116

McGee & Associates
Landscape Architecture

Project: GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Landscape Architect Report:** March 2025
Location: Sunshine Blvd.
Project Manager: Dan Schumacher, Collier County Public Services Department, Public Transportation & Neighborhood Enhancements Division
Consultant: McGee & Associates **Consultant's Representative:** Michael A. McGee, rla, isa
Landscape Contractor: A & M Property Management **Contractor's Representative:** Armando Yzaguirre
Observation Date: 3/4/2025 **Report Date:** 3/4/2025 **Report No.:** 5 (FY-25)

AC - Indicates major items recommended to be discussed by Advisory Committee **S** - Indicates items recommended to be addressed by staff, **C** - Indicates items recommended to be addressed by Contractor

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					MONTHLY ADDRESSED	Yellow - Items recommended to be addressed as soon as possible or renovation recommendations generally based upon vehicular or storm damage.
All locations		X	X		All areas are heavily water stressed due to irrigation system not functioning. All replacement plantings must be put on hold.	
Median #1		X	X	2	South End: South tip of Juniper bed has 3-4 dead Juniper plants that need to be removed. Apparent decline would be contributed water stress, but spider mites and/or a blight may also have contributed.	
		X	X	13	North End: The Blueberry flax lily bed has lost over 50% of the plants. It is recommended at this point to remove the remaining flax lilies and renovate the bed with a different plant. Install (52) 2 gal., Zamia pumila – Coontie on 3 ft. centers 3 ft. off tree trunks, back of curbs and turf edges.	
		X	X	15	North end: Previous replacement Sabal palm has died and needs to be replaced. Match existing. This type of palm will require (2) bubblers and additional hand watering to survive its planting.	
		X	X	16	North end: (13) Juniper parsonii 3 gal. that need to be replanted as replacements.	
		X	X	16	Sand cordgrass bed: The bed has (6) plants are dead or missing and need to be replaced with 3 gal. size Sand cordgrass plants.	
		X	X	16	South end: (9) Juniper replacement plants have declined and/or dead due to sever water stress. Replant with 3 gal. Juniper parsonii.	
		X	X	16	Middle Bed: Yellow African iris plants (4) plant declined and/or dead. Replant with 1 gal. Yellow African iris.	
Median #2		X		10	At address 2224: A previously planted Tabebuia tree in the turf area at some point was removed and not replaced. It is recommended to install a Floss Silk tree. (Ceiba Speciosa 11'-13' Ht., 3.5 Cal., 5'-6' Spr., 36" dia. B&B or 65 Gal. size container.	
		X	X	16	South end: Area of previous auto damaged Juniper need to be renovated. Remove damaged or dead plants and install double row of (26) 3 gal. Juniper parsoni.	
		X	X	16	At address 2248: (10) renovation Yellow African Iris have declined and need to be replaced. Remove volunteer Blueberry Flax plants in Iris.	M&A 5/7/24: Remove volunteer Firangi Pangi tree in Iris bed.
		X	X	16	At address 2184: (1) Tabebuia Ipe has been removed. It is recommended to replant with the same Tabebuia Ipe tree. 11'-13' Ht., 3.5 Cal., 5'-6' Spr., 36" dia. B&B or 65 Gal. size container.	M&A 3/7/23: The tree planted at this location was a Yellow/Silver Trumpet tree and not an Ipe or Purple trumpet tree. Removal & replacement is recommended based upon trunk damage and the inability of this type of tree to become well rooted. In addition, the metal center support poles has not been removed after the installation of the Duckbill staking system. M&A 9/5/23: The tree has been blown over by the

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
						recent winds. ~~The north duckbill anchor was installed about 12" not installed to its recommended 24" depth and as a result the tree pulled the anchor up.~~
		X	X	16	At address 2184: The Bougainvillea silhouettes are off color and are stunted in growth. Additional fertilization is highly recommended. Mulch should be pulled away from being in contact with the plant trunks.	M&A 2/8/23: (6) plants have declined and/or missing and need to be replaced. 3 gal. size. M&A 4/4/23: Plant count is now up to (10) plants and area is dry.
		X	X	16	At address 2160: (1) Tabebuia tree trunk has been girdled by staking straps. The girdling location has healed over but will remain a weak point for the main trunk. At this location an included bark branch union is present so reduce of this branch is recommended to reduce weight of the branch.	
		X	X	16	North End at 2052: Juniper parsoni have large amount of dead and brown foliage which appears to be result of insect (e.g. spider mites) or fungal disease. Contractor should review to treat issue and prune out dead foliage.	M&A 5/3/22: Contractor determined Juniper had a Blight disease and bed has been treated. Approx. 39-40 plants involved. M&A 12/6/22 (14) 3 gal. Juniper parsoni needed to finish replacements.
Median #3 - Pump Station Location- 5 hp, 6" well, VFD		X	X	10	At address 1944: Install (2) Dwarf Bougainvillea 'Helen Johnson' 3 gal. size.	
Median #4		X	X		No major issues observed.	
Median #5		X	X	16	(20+/-) renovation Blueberry flax plants have declined and need to be replaced. Issue appears to irrigation coverage. Install (20) 1 gal. Blueberry flax.	M&A 6/4/24: Based upon additional plants dying it is recommended the remaining Blueberry Flax lilies be removed and the area planted with Zamia. Install (25) 2 gal., Zamia pumila – Coontie on 3 ft. centers 3 ft. off tree trunks, back of curbs and turf edges.
Median #6		X	X	3	At address 1790 or South End: Juniper plantings have sustained vehicular damage as well as water stress causing approximately 50% of the Juniper plants to have dead foliage or entire plants are dead. It is recommended to remove all damaged and declined plants and then review for replacements or renovation.	
		X	X	5	At address 1740-1730: One Golden Tabebuia tree, flagged with white tape, has sever trunk issues due to unhealed previous pruning cuts and removal and replacement is recommended. Replace with Pink Trumpet tree, Handroanthus impetiginosus 11'-13' Ht., 3.5 Cal., 5'-6' Spr., 36" dia. B&B or 65 Gal. size container.	
		X	X	9	At address 1750 & 1760: ~~Prune back existing Bougainvillea to a 24 inch diameter.~~ Install (8) Dwarf Bougainvillea 'Helen Johnson' 3 gal. size.	
		X	X	15	At address 1720: Water stress has caused the decline of (~~13-15~~ 20) Iris plants that will need to be replaced with 3 gal. Yellow African iris plants.	M&A 6/4/24: Remove volunteer Blueberry Flax lilies.
		X	X	25	At address 1740: The Bougainvillea silhouettes are off color and are stunted in growth. Plants should be reviewed for irrigation coverage and additional fertilization. Mulch should be pulled away from being in contact with the plant trunks.	M&A 4/4/23: (~~26-30~~ 37) Bougainvillea plants have declined and/or dead. Recommended to remove all and replant bed with 3 gal. Bougainvillea 'Silhouettes'
18th Place SW Median	X	X			Recommendation: Remove all surface vegetation (Bougainvillea shrubs) and lower grade 3-inches. Install (7) 3 gal., Aechmea "Raspberry Bromeliad and mulch entire median with Rice Rock mulch to include filter cloth below Rice Rock mulch.	M&A 6/4/24: With rainy season approaching it is recommended preparations begin to renovate median as listed. M&A 11/5/24 with rainy season ending any replanting's will require truck watering at planting and for a period of establishment.
18th Ave. S.W. Median	X	X			Recommendation: Remove all surface vegetation and lower grade 3-inches. Install (8) 3 gal., Aechmea "Raspberry Bromeliad and mulch entire median with Rice Rock mulch to	M&A 6/4/24: With rainy season approaching it is recommended preparations begin to renovate median as

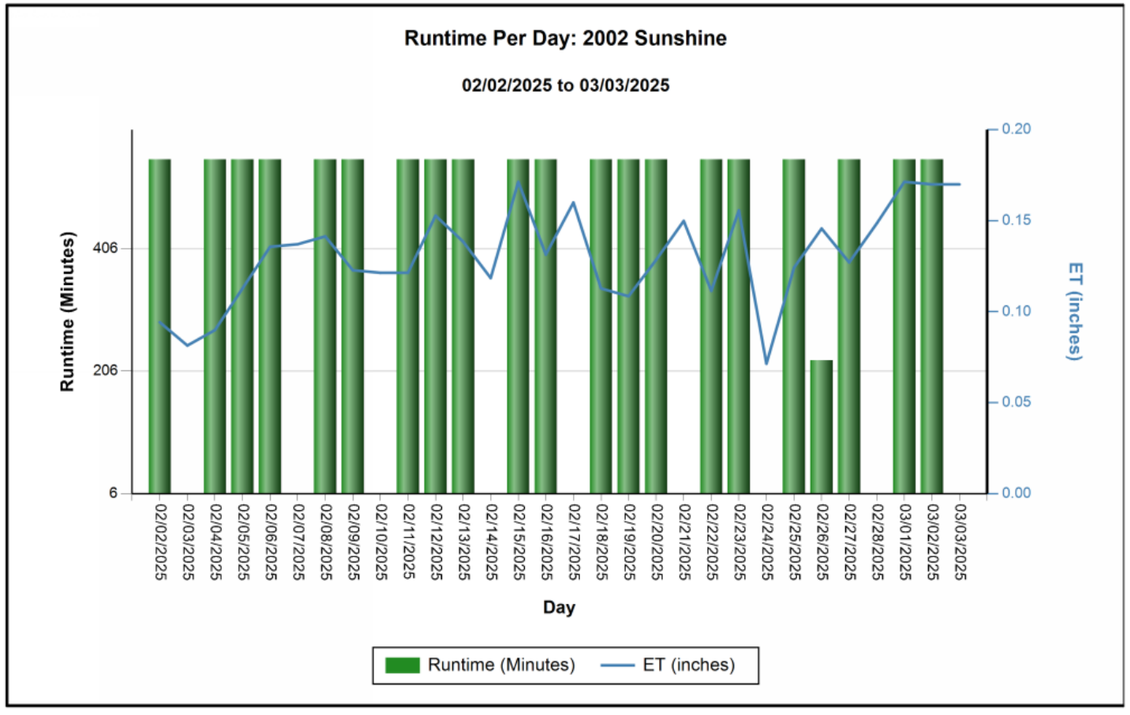
GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Location: Sunshine Blvd.** **Report Date:** 3/4/2025 **Report No.:** 5 (FY25)

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					include filter cloth below Rice Rock mulch.	listed. M&A 11/5/24 with rainy season ending any replanting's will require truck watering at planting and for a period of establishment.
					QUARTERLY ADDRESSED	
Accent/Street Lighting		X	X	2	Accent light were on at 11:00 AM in medians #5 & 6.	
	X				It is recommended all lights be reviewed for cleaning or replacements if needed. Some fixtures appear to have hazy and/or dirty lenses which reduce light levels.	
Lighting Electric Meters & Irrigation Controller Electric Source Locations					Lighting Electric Meter 2271 Sunshine Blvd., 1 SUN, Alley off 23rd Ave. SW Lighting Electric Meter & Irrigation Controller Electric, 1995 Sunshine Blvd., 2 SUN, Alley off 20th PL. SW Lighting Electric Meter 4642 18th Pl. SW, 3 SUN, North R/W	
Fertilizations:			X		Refer to schedule.	
Irrigation:		X	X		Previous month water use total per WeatherTrak controller estimate 0 gallons. Chart does not match water use. The irrigation system is not functioning properly. All areas are heavily water stressed.	

Collier County
Site: Golden Gate MTSU
09013515 - 2002 Sunshine

Single Controller Runtime History Report

WeatherTRAK



McGee & Associates
Landscape Architecture

Project: GOLDEN GATE BEAUTIFICATION, M.S.T.U.
Location: Coronado Parkway & Hunter Blvd.
Project Manager: Dan Schumacher, Collier County Public Services Department, Public Transportation & Neighborhood Enhancements Division
Consultant: McGee & Associates
Landscape Contractor: A & M Property Management
Observation Date: 3/4/2025

Landscape Architect Report: March 2025
Consultant's Representative: Michael A. McGee, rla, isa
Contractor's Representative: Armando Yzaguirre
Report Date: 3/4/2025
Report No.: 5 (FY-25)

AC - Indicates major items recommended to be discussed by Advisory Committee **S** - Indicates items recommended to be addressed by staff, **C** - Indicates items recommended to be addressed by Contractor

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					MONTHLY ADDRESSED	Yellow - Items recommended to be addressed as soon as possible or renovation recommendations generally based upon vehicular or storm damage. Red – Items if not immediately addressed will result in multiple plant loss.
Coronado Pkwy. - All locations		X			All areas need mulching now that replacement plantings have been installed.	
		X	X		It is recommended that all Perennial peanut plantings and replacement areas that are to remain shall have an application of 0-0-22-22S-11mg fertilizer and Legume Soil inoculant at 10 oz. per 100 s.f.	
	X	X			Recommended all paver areas be pressure washed and treated with "Wet & Forget" mold treatment spray.	
		X			Recommend reviewing all valve locations for green reflective markers that are missing.	
Median #1- Pavers		X			Pressure cleaning recommended	
Median #2- Pavers		X			Pressure cleaning recommended	
Median #3		X	X		No major issues observed	
Median #4		X	X		No major issues observed	
Median #5		X	X		No major issues observed	
Median #6		X	X		No major issues observed	
Median #7		X		9	Remove and herbicide volunteer Strangler Fig vine in Sabal palm trunk.	
Median #8		X			No major issues observed	
Median #9 - Pavers		X			Pressure cleaning recommended	
Median #10		X	X	6	At address 5237 & 5254: Remove volunteer Scheffleras growing in palm trunks.	
		X	X	15	At address 5327 & 5273: (4) Paurotis palm clumps need to be pruned for thinning and removal of dead or declining stems.	
Median #11 Bridge		X	X		No major issues observed	
Median #12		X	X	6	Middle of median: Alexander palm has severe trunk fugus damage due to a previous wound. It is recommended the palm be replaced. Excavate palm and replant with (1) 10 ft. clear trunk Alexander palm.	
Median #13		X	X		No major issues observed	
Median #14		X	X	15	Repair 12 L.F. of paver border, remove & replace soldier course edge to include compacted base and mortar edging. Base shall extend 12-inches beyond current edge of pavers.	
Hunter Blvd. - All locations		X	X		All locations with perennial peanut planting shall have a Legume Soil Inoculant product applied as soon as possible, as well as an application of 0-0-22-22S-11mg fertilizer.	
	X	X			Recommended all paver areas be pressure washed and treated with "Wet & Forget" mold	

McGee & Associates
Landscape Architecture

GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Location:** Coronado Pkwy. & Hunter Blvd. **Report Date:** 3/4/2024 **Report No.:** 5 (FY25)

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					treatment spray.	
		X	X	5	Mulch needed for medians 1, 2, 3, 4, 5, 6 & eastern half of median 8.	M&A 10-1-24: Recommended mulch be placed in November following rainy and hurricane season. M&A 12/3/24: All areas should be mulched.
Median #1		X	X		No major issues observed	
Median #2		X	X		No major issues observed	
Median #3		X	X		No major issues observed	
Median #4		X	X	6	At address 2288: The 4th Alexander palm from the north end is in severe decline. No Gamoderma fungus conks were observed. Recommended to remove palm and then observe remaining palms before replacement.	
Median #5 **Pump station –** Median #5, 7.5 hp, 8" well feeds Hunter & Coronado, Hydropoint Controller in median		X	X		No major issues observed	
Median #6		X	X		No major issues observed	
		X	X	16	Median: (8) Paurotis palm clumps need to be pruned for thinning and removal of declining stems.	
		X	X	4	At address 2018: (1) Jatropha tree is missing. Replant with 6 ft. overall ht. multi-stem plant.	
Median #7		X	X		No major issues observed	
Median #8		X	X	12	At address 5290 & 5300: Paurotis palm clumps need dead fronds and stalks removed, as well as thinning. Review for disease and treat if needed.	
Median #9		X	X		No major issues observed	
Median #10		X	X	16	Apply Legume Soil Inoculant product as soon as possible, as well as an application of 0-0-22-22S-11mg fertilizer.	.
Median #11		X	X		No major issues observed	
Median #12		X	X	16	Median: Repair 12 L.F. of paver border, remove & replace soldier course edge to include compacted base and mortar edging. Base shall extend 12-inches beyond current edge of pavers.	
					QUARTERLY ADDRESSED	
Fertilization:		X	X		All locations with perennial peanut planting shall have a Legume Soil Inoculant product applied as soon as possible, as well as an application of 0-0-22-22S-11mg fertilizer.	.
		X	X		Refer to FY23-24 recommended schedule.	
General Irrigation:					Previous month water use total per WeatherTrak controller estimate 300,078 gallons.	

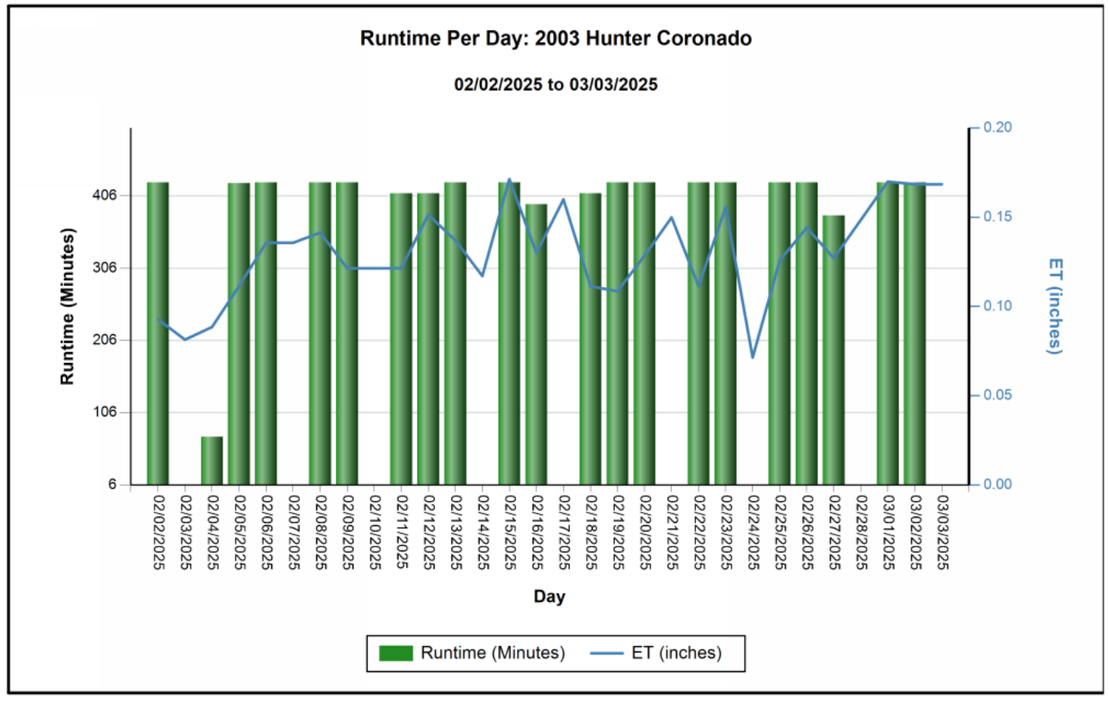
GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Location:** Coronado Pkwy. & Hunter Blvd. **Report Date:** 3/4/2024 **Report No.:** 5 (FY25)

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS

Collier County
Site: Golden Gate MTSU
09105378 - 2003 Hunter Coronado

Single Controller Runtime History Report

WeatherTRAK



McGee & Associates

Landscape Architecture

Project: GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Landscape Architect Report:** March 2025
Location: Tropicana Blvd.
Project Manager: Dan Schumacher, Collier County Public Services Department, Public Transportation & Neighborhood Enhancements Division
Consultant: McGee & Associates **Consultant's Representative:** Michael A. McGee, rla, isa
Landscape Contractor: A & M Property Management **Contractor's Representative:** Armando Yzaguirre
Observation Date: 3/4/2025 **Report Date:** 3/4/2025 **Report No.:** 5 (FY-25)

AC - Indicates major items recommended to be discussed by Advisory Committee **S** - Indicates items recommended to be addressed by staff, **C** - Indicates items recommended to be addressed by Contractor.

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					MONTHLY ADDRESSED	Yellow - Items recommended to be addressed as soon as possible or renovation recommendations generally based upon vehicular or storm damage.
All locations:		X	X		Recommend all irrigation heads within Juniper plantings be reviewed for pruning foliage or branches away.	
		X	X		Recommend all light poles be reviewed to prune foliage away from bases.	
		X			It is recommended that all areas be mulched.	
	X	X			Recommended all paver areas be pressure washed and treated with "Wet & Forget" mold treatment spray.	
Median #1	X	X		14	Recommend renovation of Dwarf Jasmine plantings based upon poor performance at this location. Remove all surface vegetation and debris except for existing Bromeliads and replant area with (275) 1 gal. Liriope 'Big Blue'.	
Median #2		X	X	15	The existing quick coupler valve box is broken and deformed and needs to have the top box and lid removed and new ones installed.	
Pedestrian shelter at 31st Ave. SW		X			Pavers should be cleaned	
Median #3 Bridge		X	X	7	North end: On tip of median 3 Juniper have been runover and removal and replacement is recommended. (3) Juniper parsonii 3 gal. size.	
		X	X	16	South end: (5-8) Yellow African Iris in decline or missing. Replant with 3 gal. size.	
		X	X	15	North end: ~~Remove Blueberry Flax volunteers.~~	M&A 9/6/22: (3) Yellow African Iris in decline or missing. Replant with 3 gal. size. M&A 3/7/23 the number of replacements has increased to a total of (~~9~~ 12).
Median #4		X	X	3	North end: Remove volunteer Oyster plants and Asparagus fern in Juniper plants.	
		X	X	10	At address 3044: Irrigation head is leaning. Recommend remove and install Rainbird 1812 16" ht. pop-up spray head set flush with grade.	
		X	X	10	At address 2860: Install (2) White African Iris 3 gal. size	
		X	X	10	At address 2672: Install (3) White African Iris 3 gal. size	
		X	X	10	At address 2896: Install (1) White African Iris 3 gal. size	
		X	X	16	At address 2930: Recommend removing two Crape myrtles and replace with (2) Crape Myrtle 'Natchez', White, 30 gal., 2" cal., 8'-10' ht., 5'-6' spr., Multi-stem (4 min.). Will require (1) bubbler location with (2) adjustable flood bubblers per tree.	
Pedestrian Shelter- 28th Ave. SW		X			Pavers should be cleaned	
Median #5		X	X	3	At address 2672: (4) White African Iris missing. Install (4) 3 gal. size.	
		X	X	14	At address 2672: Holly tree has totally defoliated, and main trunk bark is cracking. Decline would contribute to mature age of 16+/- years and past site conditions. Recommendation	

GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Location:** Tropicana Blvd. **Report Date:** 3/4/2025 **Report No.:** 5 (FY-25)

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS
					is to schedule removal by excavation and replant with Ilex x attenuate – East Palatka Holly 10' Ht., 3' spr., 3.5" cal. in 65 gal. container	
		X	X	15	At address 2600-2582: Holly tree has totally defoliated, root system is rotting, main trunk has severe rot due to previous pruning wounds not compartmentalizing and healing over. Recommendation is to schedule removal by excavation and replant with Ilex x attenuate – East Palatka Holly 10' Ht., 3' spr., 3.5" cal. in 65 gal. container	
		X	X	15	At address 2654: (3) White African Iris missing, replant with 3 gal. size.	
		X	X	15	At address 2578: (3) White African Iris in decline, replant with 3 gal. size.	
		X	X	15	At address 2520: ~~Remove volunteer Crape myrtles growing in Bougainvillea bed.~~	M&A 11/7/22: it is recommended due to the amount of shade over this planting location that the existing Bougainvillea and Crape myrtle sprouts be removed, and the area planted with Bromeliads. (45) Neoregelia carolinae 'Tricolor', 6" pots, 24" o.c.+/-, first row 4' off back of curb. M&A 9/5/23: It appears carpe myrtle sprouts have been treated with herbicide.
		X		2	At address 2600: Recommend Oak, 18" caliper, 50% damaged in main trunk from broken off large branch be monitored yearly.	M&A 6/6/23: This Oak is adjacent to the declined Holly tree at address 2701 that is being recommended for removal and replacement. It is recommended that this Oak tree be coordinated for removal by excavation and replace with Quercus virginiana 'Cathedral' 11'-13' ht., 3.5 cal., 5' spr. 36" dia. root ball or 65 gal. container.
Median #6 (Pavers only)		X	X		No major issue observed. Recommended pavers be pressure washed and treated with "Wet & Forget" mold treatment spray.	
					QUARTERLY ADDRESSED	
Accent/Street Lighting		X		6	Multiple accent lighting fixtures appear to have corroded metal edges and hazy and/or dirty lenses which reduce light levels. It is recommended all lights be reviewed for cleaning or replacements if needed.	
		X		6	Median #1 south light pole fixture has been turned out of alignment with the median.	
Lighting Disconnect & Sensor Locations					East R/W between 13th Ave. & PL. Lighting Disconnect & Sensor West Alley off 28th Ave. SW Lighting Disconnect & Sensor West R/W in Alley between G.G. Pkwy. & 26th PL. SW, Lighting Disconnect & Sensor West R/W at corner of 30th PL. SW & Tropicana Lighting Disconnect & Sensor	
Fertilizations:		X	X		Refer to schedule to be developed with Contractor.	
Irrigation:		X			Previous month water use total per WeatherTrak controller estimate 393,236 gallons.	

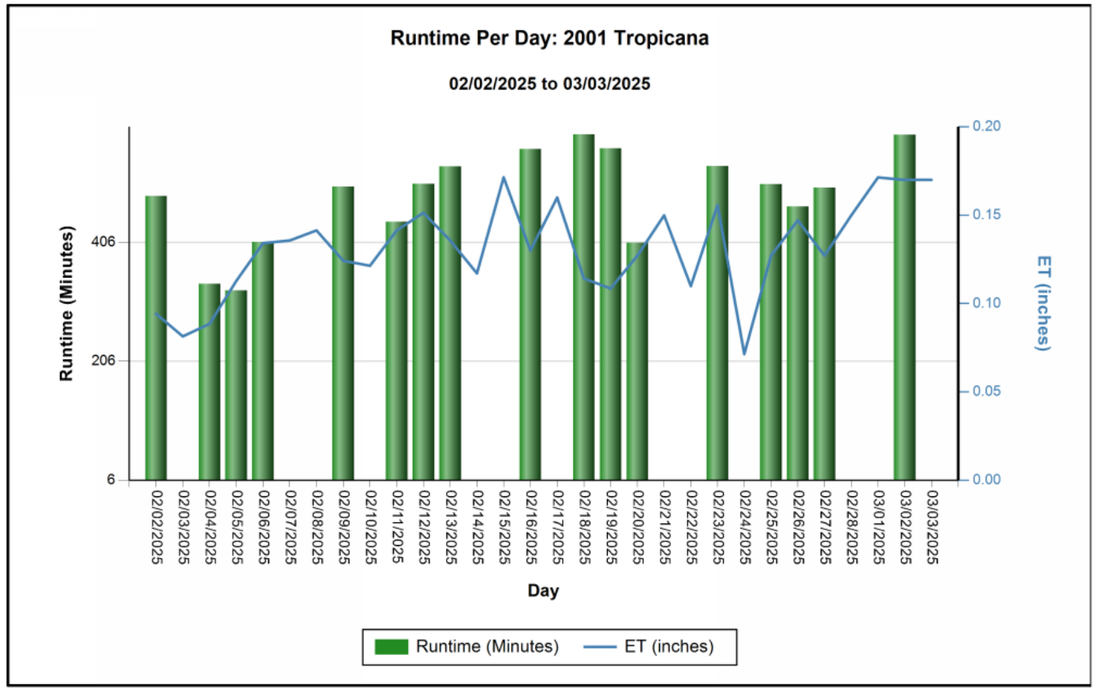
GOLDEN GATE BEAUTIFICATION, M.S.T.U. **Location:** Tropicana Blvd. **Report Date:** 3/4/2025 **Report No.:** 5 (FY-25)

LOCATION/WORK AREA	AC	S	C	R	MAINTENANCE SERVICES OBSERVATIONS & RECOMMENDATIONS	RESPONSE or COMMENTS

Collier County
Site: Golden Gate MTSU
09012040 - 2001 Tropicana

Single Controller Runtime History Report

WeatherTRAK



Golden Gate M.S.T.U.
Fund 1621
March 18, 2025

	FY-25	Vendor	Item	PO#	Budget	Commitments	Expenditures	Available
1	MILLAGE COLLECTED & INTEREST		MSTU Revenues		$ (743,200.00)	$ -	$ (672,028.64)	$ (71,171.36)
2	CARRY FORWARD		Unexpended Prior Year Funds		$ (2,006,206.25)	$ -	$ -	$ (2,006,206.25)
	ALL REVENUES				**$ (2,749,406.25)**	**$ -**	**$ (672,028.64)**	**$ (2,077,377.61)**
		McGee & Associates	Landscape Architect (FY-25)	4500234204		$ 20,943.35	$ 5,136.65	
		McGee & Associates	Landscape Architect (FY-24)	4500228494		$ -	$ 1,308.30	
3	ENG. FEES & OTHERS (631403)				$ 34,758.25	$ 20,943.35	$ 6,444.95	$ 7,369.95
4	INDIRECT COST REIMBURSE (634970)	Collier County	Indirect Cost	Direct Pay	$ 4,700.00	$ 2,350.00	$ 2,350.00	$ -
		A&M Property Maintenance		4500233652		$ 34,175.00	$ 825.00	
5	LANDSCAPE INCIDENTALS (634990)				$ 30,000.00	$ 34,175.00	$ 825.00	$ (5,000.00)
		A&M Property Maintenance		4500233652		$ 44,490.00	$ 70,510.00	
6	OTHER CONTRACTUAL (634999)				$ 222,000.00	$ 44,490.00	$ 70,510.00	$ 107,000.00
		Tree Scaping	Tree & Palm - Pruning	4500234124		$ 15,000.00	$ -	
		Tree Scaping	Tree & Palm - Removal	4500235294		$ 5,000.00	$ -	
		Naples Electric Motor Works	Pump Station Services	4500234617		$ 3,000.00	$ -	
		Lykins Signtek & Development	Welcome Sign	4500232891		$ 6,548.00	$ -	
7	OTHER CONTRACTUAL (639990)				$ 36,548.00	$ 29,548.00	$ -	$ 7,000.00
8	ELECTRICITY (643100)	FPL	Electricity	4700005162	$ 3,500.00	$ 2,327.15	$ 1,172.85	$ -
9	INSURANCE GENERAL(645100)	Collier County	Insurance	Direct Pay	$ 600.00	$ 300.00	$ 300.00	$ -
	Building RM (646180)	Collier County	Bldg Repairs				$ 300.14	$ (300.14)
12	SPRINKLER SYSTEM(646311)	SiteOne	Irrigation Parts & Pumps	10330453	$ 10,000.00	$ 4,217.41	$ 782.59	$ 5,000.00
13	MULCH(646318)	Southeast Spreading			$ 25,000.00	$ -	$ -	$ 25,000.00
		Simmonds Electrical	Electrical Services	4500234109		$ 5,000.00	$ 23.59	
14	LIGHTING MAINTENANCE(646451)				$ 5,000.00	$ 5,000.00	$ 23.59	$ (23.59)
15	LICENSE & PERMITS(649010)				$ 2,000.00	$ -	$ -	$ 2,000.00
		Premier Staffing	Transcription	4500234229		$ 2,086.90	$ 712.80	
		Naples Christmas Lighting DBA Sight I	Holiday Decorations	4500234277		$ -	$ 2,975.00	
16	OTHER MISCELLANEOUS (649990)				$ 5,000.00	$ 2,086.90	$ 3,866.00	$ (952.90)
17	OFFICE SUPPLIES (651110)				$ 100.00	$ -	$ -	$ 100.00
18	COPYING CHARGES(651210)	J.M. Todd	Copier CPC	4500234730	$ 200.00	$ 75.50	$ 74.50	$ 50.00
19	FERT HERB CHEM(652310)	Howard Fertilizer		4500234102	$ 5,000.00	$ 398.00	$ 1,602.00	$ 3,000.00
20	OTHER OPERATING (652990)				$ 500.00	$ -	$ -	$ 500.00
21	**OPERATING EXPENSES**				**$ 384,906.25**	**$ 145,911.31**	**$ 88,251.62**	**$ 150,743.32**
22	PTNE STAFF & DIVISION OVERHEAD (911011)				$ 67,400.00	$ -	$ -	$ 67,400.00
23	PROPERTY APPRAISER (930600)				$ 5,400.00	$ -	$ 2,637.08	$ 2,762.92
24	TAX COLLECTOR (930700)				$ 14,500.00	$ -	$ 13,680.50	$ 819.50
25	**COUNTY OVERHEAD**				**$ 87,300.00**	**$ -**	**$ 16,317.58**	**$ 70,982.42**
26	IMPROVEMENTS GENERAL (763100)				$ 2,277,200.00	$ -	$ -	$ 2,277,200.00
27	**CAPITAL PROJECTS**				**$ 2,277,200.00**	**$ -**	**$ -**	**$ 2,277,200.00**
27	**ALL EXPENSES**				**$ 2,749,406.25**	**$ 145,911.31**	**$ 104,569.20**	**$ 2,498,925.74**
28	**FY-25 BUDGET GRAND TOTAL**		= ALL REVENUES - ALL EXPENSES		**$ -**	**$ 145,911.31**	**$ (567,459.44)**	**$ 421,548.13**

Golden Gate M.S.T.U.
Fund 1621
March 18, 2025

516,253,177	FY 13 Final Taxable Value	7.8%			
533,888,677	FY 14 Final Taxable Value	3.4%			
575,541,732	FY 15 Final Taxable Value	7.8%			
611,031,317	FY 16 Final Taxable Value	6.2%			
673,743,701	FY 17 Final Taxable Value	10.3%			
749,340,700	FY 18 Final Taxable Value	11.2%			
813,136,298	FY 19 Final Taxable Value	8.5%			
885,583,987	FY 20 Final Taxable Value	8.9%			
987,248,891	FY 21 Final Taxable Value	11.5%			
1,067,233,321	FY 22 Final Taxable Value	8.1%			
1,214,827,173	FY 23 Final Taxable Value	13.8%	+9.1% Average		
1,351,201,209	FY 24 Final Taxable Value	11.2%			
$1,473,376,239	**FY 25 Gross Taxable Value**				
8.94%	**Adjustment FY 24 to FY 25**				
	FY 25 Gross MSTU Revenue	FY 24			
Millage	**0.5000**	0.5000	**0.5 mill cap**		
Tax Dollars	**$736,688**	$675,601	**$129,275**	**Increase**	

Total Available Balance	**$ 2,498,925.74**
Plus Commited And Not Spent	**$ 145,911.31**
Estimated Cash	**$ 2,644,837.05**

Prepared 03.11.2025 GH



GOLDEN GATE M.S.T.U. ADVISORY COMMITTEE

8300 Radio Road
Naples, FL 34104
January 21, 2025

MINUTES

I. CALL TO ORDER
The meeting was called to order at 4:28 P.M. by Chair Spencer. Attendance was called and a quorum of three was established.

II. ATTENDANCE

Advisory Committee	Patricia Spencer – Chair
	Paula Rogan – Vice Chair (Excused)
	Florence "Dusty" Holmes
	Ron Jefferson
	- Committee Vacancy -
Staff	Brian Wells – PTNE Director (Excused)
	Dan Schumacher – Project Manager
Contractors	Mike McGee – Landscape Architect, McGee & Associates
	Armando Yzaguirre – Grounds Maintenance, A & M Property Maintenance
	Wendy Warren – Transcription, Premier

III. PLEDGE OF ALLEGIANCE
The Pledge of Allegiance was recited.

IV. APPROVAL OF AGENDA
Ms. Holmes moved to approve the Agenda of the Golden Gate MSTU Advisory Committee as presented. Second by Mr. Jefferson Carried unanimously 3 - 0.

V. APPROVAL OF MINUTES – December 17, 2024
Mr. Jefferson moved to approve the Golden Gate MSTU Advisory Committee meeting minutes of December 17, 2024, as presented. Second by Chair Spencer. Carried unanimously 3 - 0.

VI. LANDSCAPE MAINTENANCE REPORT – A & M Property Maintenance

Mr. Yzaguirre reported:

- Routine landscape maintenance services have been performed on all MSTU roadways.
- Refurbishment of the medians on Hunter Boulevard and Coronado Parkway is near completion.
- Plant material deficiencies have been identified and a proposal for additional plants/trees for Hunter, Coronado and Tropicana will be submitted to Mr. Schumacher.
- Irrigation issues continue to occur.

Mr. Schumacher reported:

Irrigation

- The irrigation system on Sunshine Boulevard is not functioning as intended.
- The Board of County Commissioners (BCC) has awarded a contract to Agricultural Services International, LLC for Irrigation Pump Station Maintenance, Repairs and Services**.**
- ASI will be retained to diagnose the system and recommend repairs and/or replacement of components and the pump.
- Naples Electric Motor Works (NEMW) previously installed an internal fan on the Variable Frequency Drive and determined the fittings on a pipe were leaking.
- Median plantings on Sunshine Boulevard will be installed upon the resolution of the irrigation issues.

Mulch

- A cost quote for mulch will be requested from Southeast Spreading and installation scheduled.

Tree Pruning

- Trimming of Palms and hardwood trees will be scheduled with Tree Scaping Of Naples, Inc.

VII. LANDSCAPE ARCHITECT'S REPORT – McGee & Associates

Mr. McGee summarized the January 7, 2025, observation report.
(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

A. Sunshine Boulevard
B. Coronado Parkway & Hunter Boulevard
C. Tropicana Boulevard

Comments

Mr. McGee reported:

All locations

- Mulch (County Brown) is recommended for all planting beds, applied upon completion of plant replacements.
- Irrigation zones where replacement plants have been installed need to have additional days and/or time added.

Sunshine Boulevard

- Review all Duckbill tree staking systems quarterly to determine if the cables and rubber straps need to be adjusted.
- Median areas are stressed due to irrigation not functioning. Plant replacements should be put on hold.

Coronado Parkway and Hunter Boulevard

- Irrigation zones where replacement plants have been installed need to have additional days and/or time added.
- Review Alexander Palms to ensure bubblers are positioned 12-inches off the edge of trunks and pinned to the ground.
- Confirmed Palms do not have Ganoderma.
- Remove dead fronds and stalks from Paroutis Palms clumps.
- Recommend Perennial Peanut beds have an application of 0-0-22-22S-11mg fertilizer and Legume Soil Inoculant quarterly.

Collier Boulevard Widening Phase III

The project is along Collier Boulevard between City Gate Boulevard North and Green Boulevard and involves widening Collier Boulevard from four to six lanes within the project limits. It includes realigning portions of the adjacent CR 951 Canal. The project is anticipated to complete design by mid-2025.

MSTU's participation in landscaping areas within the MSTU boundaries will be considered at a future meeting.

***Mr. Schumacher** will **extend an invitation to Pam Lulich**, Landscape Operations Manager, to attend an MSTU meeting to inform members of the status of landscape design for the Collier Boulevard project.*

Comments

Mr. Schumacher reported:

- Fertilizer for Perennial Peanut, 0-0-22-22S-11mg, will be ordered and application scheduled.
- Median plantings on Sunshine Boulevard will be installed on the resolution of the irrigation issues.
- Replacement cost for eleven (11) decorative light poles on Tropicana Blvd. medians will be evaluated with quotes to be solicited from manufacturers Lumec and Sternberg.

VIII. PROJECT MANAGER'S REPORT

Mr. Schumacher reported:

A. Budget Report

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Golden Gate MSTU Fund 1621 Budget for January 21, 2025, prepared January 13, 2025.

- Purchase Orders
  1. FPL - electricity.
  2. A & M Property Maintenance – ground maintenance.
     a. Incidentals – landscape plants, materials, and refurbishment.
     b. Maintenance – regular landscape & irrigation maintenance.
  3. Howard Fertilizer – fertilizer.
  4. Lykins-Signtek – "Welcome Sign"
  5. McGee & Associates – landscape architectural services.
  6. Naples Christmas Lighting – Holiday decorations.
  7. Naples Electric motor Works (NEMW) – pump station maintenance.
  8. Premier Staffing – transcription services.
  9. Simmonds Electrical – electrical maintenance and repairs.

10. SiteOne Landscape Supply – irrigation parts & components.
11. Southeast Spreading – mulch.
13. Tree Scaping of Naples – tree pruning and removal.

- Budget Summary
  1. Line 1, Ad Valorem Tax Collections & Interest – Of the $743,200 budgeted, $639,798 has been collected and $103,401 remains to be collected.
  2. Line 2, Carry Forward – Unspent funds accumulated from previous fiscal years and retained within the MSTU, in the amount of $2,006,206.
  3. All Revenues – Of the $2,749,406 budgeted, $639,798 has been collected leaving an available balance of $2,109,607 (the sum of lines 1 and 2) minus Expenditures.
  4. Line 21, Operating Expense – Of $384,906 budgeted, $180,719 is committed on MSTU-issued Purchase Orders and $53,119 has been spent, leaving the remainder of $151,067 available within budget for additional operating expenses as needed.
  5. Line 25, County Overhead – Of the $87,300 budgeted, $14,126 has been transferred, and a balance of $73,173 remains to be assessed (PTNE Staff & support, Property Appraiser, & Tax Collector).
  6. Line 27, Capital Projects – A balance of $2,277,200 remains for improvement projects.
  7. Line 27, All Expenses – Of $2,749,406 budgeted, $180,719 is committed to existing Purchase Orders, and $67,246 in total expenditures, leaving a remainder of $2,501,440 available for MSTU expenditures.

- General
  a. MSTU Tax Rate: 0.5000 Mills (0.05%) for beautification improvements and maintenance within the taxing district is reviewed annually.
  b. Funds not spent in 2025 (FY-25) will be carried forward into FY-26.
  c. Tax millage and interest collected by the Golden Gate Beautification MSTU may only be utilized by the MSTU and within the MSTU district boundary.

Mr. Schumacher noted:

- The approved invoice for Naples Christmas Lighting is on the Board of County Commissioners (BCC) consent Agenda for payment.
- The proposed irrigation and landscape project on Golden Gate Parkway will be funded from the Capital Projects category.
- Uncommitted funds available within budget are eligible for transfer to other categories upon approval by the Committee.
- The Office of Budget Management (OMB) will be consulted regarding the addition of a note in the FY-26 budget to identify $150,000 in the Capital Improvements category dedicated to funding expenses incurred for disaster/ catastrophic events, perhaps per MSTU roadway.
- The *Asset Management Plan* report to estimate useful life of MSTU assets and corresponding expenditure projections to fund maintenance will be updated during the 2026 budget planning process.
- The Ad Valorem taxable value within the MSTU increased 8.94% for fiscal year 2025 over 2024 generating additional revenue of $129,275.

B. Community Welcome Sign Renovation – Golden Gate Parkway (west)

Mr. Schumacher reported:

- The Committee approved the sign design at the October 15, 2024, meeting.
- Lykins Signtek confirmed the sign will be finished week ending January 25th.
- He will inspect the sign prior to installation to confirm color application is consistent with the colors selected.
- The sign mounting standards and hardware will be prepped and painted on site prior to the sign installation.
- A new landscape light will be installed.

IX. OLD BUSINESS

None

X. NEW BUSINESS

A. Irrigation Extension - Pkwy Median 2 & New Bridge over Santa Barabara Canal

Mr. Schumacher reported:

- The Road Maintenance Division is considering restoration of the irrigation and landscaping at the intersection of Santa Barbara Blvd. and Golden Gate Parkway, west of the sign.
- The original irrigation lateral pipes were previously severed and capped, and irrigation heads disconnected during a County project in the area.
- Irrigation is necessary on both east and west sides of the bridge. Everything is already in place on the west side, whereas the east side requires piping and sprinkler heads.
- The irrigation line installation labor segment of the project is expected to go out for bid with anticipated installation in 2025.
- The County will supply parts for the project.
- Plants will be selected upon project completion for installation in spring 2025. TRUE?
- The MSTU has offered to share the cost of the project with the County.
- Upon installation, Road Maintenance Division will be responsible for maintaining the subject improvements.

Mr. Schumacher *will consult Pam Lulich, Landscape Operations Manager, to review the project. and extend an invitation for a department representative to attend an MSTU meeting.*

XI. COMMITTEE MEMBER COMMENTS

Holiday Decorations 2026

- Plans for Holiday Decorations in the Right-of-Way (ROW) on Golden Parkway, at the intersection of Santa Barbara Boulevard, will be addressed in June 2026.
- A full-size Christmas tree design of multi-color lights utilizing the flagpole will be considered.
- The replacement Welcome Sign will be prominently incorporated into the design.

Streetlamps

- The light pole on Coronado Parkway with blinking lamps will be identified and reported to FPL.

Sidewalk Restoration

- In a Golden Gate Civic Association meeting, discussion noted the sidewalk on Coronado Parkway will be restored with asphalt upon completion of the County's Public Utility project.

XII. ADJOURNMENT

There being no further business to come before the Committee, the meeting was adjourned by the Chair at 5:17 P.M.

GOLDEN GATE MSTU ADVISORY COMMITTEE

Patricia Spencer

Patricia Spencer, Chair

The Minutes were approved by the Committee on Mar. 18, 2025 as presented ✓ or as amended ____.

https://www.collierptne.com/mtsu/golden-gate-beautification-advisory-committee/

NEXT MEETING: **FEBRUARY 18, 2025 – 4:30 PM**
GOLDEN GATE COMMUNITY CENTER
4701 GOLDEN GATE PARKWAY
NAPLES, FL 34116

GOLDEN GATE COMMUNITY CENTER ADVISORY BOARD (GGCCAB)
MEETING MINUTES
02/03/2025

ADVISORY BOARD MEMBERS PRESENT:

KAYDEE TUFF, ADVISORY BOARD CHAIR

WILLIE BRICE, ADVISORY BOARD MEMBER

LIZETTE HOMAR-RAMOS, ADVISORY BOARD MEMBER

ANGELA RICHBERG, ADVISORY BOARD MEMBER

CONSTANCE BETTINGER, ADVISORY BOARD MEMBER

ALSO PRESENT:

RAY CORIANO, GGCC SUPERVISOR – PARKS & RECREATION

MARIAH BOSETTI, GGCC TRANSCRIPTIONIST – PARKS & RECREATION

I. **Call to Order**
Ms. Tuff called the Meeting to order at 6:02 PM.

II. **Attendance/Establish a Quorum**
Roll Call was taken. All Members were present; a quorum was established.

III. **Pledge of Allegiance**
Mr. Brice led the Pledge of Allegiance.

IV. **Approval of Agenda**
Ms. Tuff called for a motion to approve the Meeting Agenda, Ms. Homar-Ramos entered the motion, it was seconded by Ms. Richberg. All members were in favor. The motion was carried.

V. **Approval of Minutes – January 6th, 2025**
Ms. Tuff called for a motion to approve the Meeting Minutes from January 6th, 2025. Ms. Bettinger entered the motion; it was seconded by Mr. Brice. All members were in favor. The motion was carried.

VI. **Public Comments**
There were no members of the public present.

VII. **Monthly Budget Report**
Mr. Coriano gave the Budget overview for the month of January. He stated that he tried to simplify the Budget Report so that the Board might have an easier time seeing where the numbers are coming from.

A. **FY2025 Budget Amended: $553,700.00**
Total Actuals: $407.718.77
Available: $402,768.29

1. **Revenues**
   a. **FY2025 Amended:** **$954,400.00**
   b. **FY2025 Total Actuals:** **$679,748.35**
   c. **Available:** **$274,651.65**
   d. **Actual Monthly Revenues for GGCC:** **JANUARY:** **$31,223.75**
   We are at 71.2% consumption on Revenues for FY2025.
2. **Operating Expenses:**
   a. **FY2025 Amended: $1,508,100.00**
   b. **FY2025 Total Actuals:** **$272,029.58**
   c. **Available:** **$274,651.65**
   d. **Actual Monthly Expenses for GGCC:** **JANUARY:** **$13,358.46**
   We are at 55.1% consumption on Expenses for FY2025.

Ms. Tuff asked if it would be possible to see another community center's monthly budget, for comparison purposes. Mr. Coriano stated that he wasn't sure if we could, but he could find out for the next meeting.
Ms. Bettinger asked if Mr. Coriano could find out how much money we have in our reserves for the next meeting. Mr. Coriano stated that he would find out.

Ms. Homar-Ramos asked if the Board could invite Commissioner Saunders to the next Meeting? Ms. Tuff agreed that it would be a good idea to invite him, and that they should invite him to attend a meeting at least once a year in the future. She thinks that it would be good for him to see what goes on here. Ms. Bettinger agreed. Mr. Coriano stated that the Board Members would have to be the ones to extend the invitation to the Commissioner.

VIII. Facility Walk Through

Mr. Coriano guided the Board on a walk around of the main Golden Gate Community Center building, including Meeting Rooms B & C, the Auditorium, Kitchen, both sets of restrooms, VPK & Afterschool Rooms, and the Gym, storage closet, & Gym Concession Kitchen.
He explained that we have rooms available for rental. The rental cost/room assignment is based on the capacity (how many people the room can hold) for each room, and the type of event.

Mr. Brice and Ms. Bettinger suggested that if the long-term renters are using our spaces for storage of their equipment, then we should be charging them a storage fee along with their regular rental fees. All the Board Members Agreed. Mr. Coriano explained any additional charges to permit need to be approved by Parks & Recreation Operations, but he can find out more info about storage charges.

Ms. Tuff suggested that the Board move the walk through of Wheels to the next meeting. All Members Agreed.

IX. Member Comments

Ms. Tuff asked for Member Comments; all Members opted to PASS on comment.

X. Adjournment

With no further topics for discussion, Ms. Tuff called for a motion to adjourn the Meeting. Ms. Homar-Ramos entered the motion, Ms. Bettinger seconded the motion, and all agreed. The Meeting was adjourned at 7:45PM.

Golden Gate Community Center Advisory Board

Kaydee Tuff

Kaydee Tuff, Chairman

These minutes approved by the Board on 3/3/2025 as presented,

or as amended _____.

Next Meeting, March 3rd, 2025, at 6:00PM
Golden Gate Community Center • 4701 Golden Gate Parkway, Rm. C, Naples, FL 34116

GOLDEN GATE COMMUNITY CENTER
ADVISORY BOARD
AGENDA

March 3rd, 2025
6:00p.m.

I. Call to Order

II. Attendance – Establish a Quorum

III. Pledge of Allegiance

IV. Approval of Agenda

V. Approval of Minutes – February 3rd, 2025

VI. Public Comments

VII Monthly Budget Report

A. FY2025 = 1605 – 157710
Budget Amended: $553,700.00
Total Actuals: $242,128.64
Available: $391,045.40

1. Revenues:
a. FY2025 Amended: **$954,400.00**
b. Actual Monthly Revenues for GGCC: **FEBRUARY: $41,908.08**
c. FY2025 Total Actuals: ***$722,988.92***
d. Available: **$231,411.08**

2. Operating Expenses:
a. FY2025 Amended: **$749,000.00**
b. Actual Monthly Expenses for GGCC: **FEBRUARY: $10,194.39**
c. FY2025 Total Actuals: ***$194,462.29***
d. Available: **$231,177.94**

VIII. FACILITY WALKTHROUGH – Wheels Skate & BMX Park

XI. Member Comments

XII. Adjournment

The next scheduled meeting is on Monday, April 7th, 2025, 6:00pm,
Golden Gate Community Center, Room C
4701 Golden Gate Pkwy, Naples FL 34116

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

February 26, 2025

FOR IMMEDIATE RELEASE

Notice of Public Meeting
Golden Gate Community Center Advisory Board
Collier County, Florida

March 3, 2025
6:00 p.m.

Notice is hereby given that the **Golden Gate Community Center Advisory Board** will meet on Monday, March 3, 2025 at **6:00 p.m.** This meeting will be held at the Golden Gate Community Center, Conference Room C, 4701 Golden Gate Parkway, Naples, Florida.

About the public meeting:

Two or more members of the Board of County Commissioners may be present and participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting of that board.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call the Collier County Parks & Recreation Division at (239) 252-4000.

###

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliergov.net
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

March 5, 2025

FOR IMMEDIATE RELEASE

Notice of Hybrid Remote Public Meeting
Collier County Community Redevelopment Agency
Immokalee Local Redevelopment Advisory Board
Immokalee Beautification MSTU Advisory Committee
Collier County, Florida

March 19, 2025
8:30 a.m.

Notice is hereby given that the **Immokalee Local Redevelopment Advisory Board** and the **Immokalee Beautification Municipal Service Taxing Unit (MSTU) Advisory Committee** will meet on Wednesday**, March 19th** at **8:30 a.m.** This will be a Hybrid Remote Meeting, and it will be held at the CareerSource SWFL, 750 South 5th Street, Immokalee, Florida. Some of the Board Members and staff may be appearing remotely, with staff present in person. The public may attend either remotely or in person.

Individuals who would like to participate remotely should email Yuridia Zaragoza at Yuridia.Zaragoza@colliercountyfl.gov by March 18th at 4:00 p.m.

The agenda will be posted on the Immokalee CRA's website at https://immokaleecra.com/meetings-information-1.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting of those boards, councils or agencies.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management

Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Yuridia Zaragoza at (239) 867-0025**.**

###

Collier County Community Redevelopment Agency
IMMOKALEE CRA
The Place to Call Home

CRA Board

Commissioner
William McDaniel Jr.
Co-Chair
District 5

Commissioner
Dan Kowal
Co-Chair
District 4

Commissioner
Burt L. Saunders
District 3

Commissioner
Chris Hall
District 2

Commissioner
Rick LoCastro
District 1

CRA Advisory Board

Mike Facundo
Chairman

Lupita Vazquez Reyes
Vice-Chair

Mark Lemke
Anne Goodnight
Andrea Halman
Estil Null
Edward "Ski" Olesky
Yvar Pierre
Paul Thein

MSTU Advisory Committee

Bernardo Barnhart
Chairman

Jimmy Nieves
Vice- Chair

Andrea Halman
Cherryle Thomas.

CRA Staff

John Dunnuck
Executive Director
Facilities & CRA

Christie Betancourt
CRA Assistant Director

Yvonne Blair
CRA Project Manager

Yuridia Zaragoza
CRA Operations
Support Specialist I

Kizzie Fowler
CRA Intern

Joint Meeting of the Collier County Community Redevelopment Agency Immokalee Local Redevelopment Advisory Board and the Immokalee Beautification MSTU Advisory Committee.

AGENDA
Hybrid Remote Public Meeting
(*Please see details below)

Immokalee CRA
750 South 5th Street
CareerSource SWFL
Immokalee, FL 34142
239.867.0025

March 19, 2025 – 8:30 A.M.

A. Call to Order
B. Pledge of Allegiance and Prayer
C. Roll Call and Announcement of a Quorum
D. Voting Privileges for Board Members via Zoom *(CRA & MSTU Action Item)*
E. Approval of Agenda *(CRA & MSTU Action Item)*
F. Approval of Consent Agenda *(CRA & MSTU Action Item)*
    1. Minutes
        i. Joint CRA & MSTU Advisory Board Meeting for February 19, 2025 (Enclosure 1)
    2. Budget Reports (Enclosure 2)
    3. Code Enforcement Report (Enclosure 3)
    4. Staff Reports
        i. Assistant Director Report (Enclosure 4)
        ii. Project Manager Report (Enclosure 5)
        iii. Project Manager Field Observation Report (Enclosure 6)
        iv. Community Meetings (Enclosure 7)
G. Announcements
    1. Public Comment speaker slips
    2. Communications Folder
    3. CRA Budget Workshop date
H. Other Agencies
    1. FDOT updates
    2. Other Community Agencies
I. Community Presentations *(CRA Action Items)*
    1. El Gran Taco Loco Restaurant (Enclosure 8)
    2. Sainvilus Subdivision (Enclosure 9)
    3. Immokalee Community Campus (Enclosure 10)
    4. Community updates
J. New Business
    1. 2024 CRA Annual Report – DRAFT (Enclosure 11) *(CRA & MSTU Action Item)*
    2. Property Available for County Use (Enclosure 12) *(CRA Action Item)*
K. Old Business
    1. Advisory Board update
    2. Board Merger (Enclosure 13) *(CRA & MSTU Action Item)*

3. Contactor Maintenance Reports
    i. A&M Property Maintenance Report & Schedule (Enclosure 14)
4. Collier County Sherriff Office Lighting Survey
    i. Lighting Study Action Plan (Enclosure 15)
5. Brief Staff project update
    i. Immokalee Sidewalk Phase III – Eustis Ave. and W. Delaware Ave.
    ii. First Street Corridor Safety Project update
    iii. Immokalee Historic Cemetery update
6. Office Lease update

L. Citizen Comments

M. Next Meeting Date

The **CRA Board** will be meeting jointly with the **MSTU Board** on ***Wednesday, April 16, 2025,*** at 8:30 A.M. at CareerSource SWFL.

N. Adjournment

*** Hybrid Remote Public Meeting**

Some Advisory Board members and staff may be appearing remotely, with staff present in person. The public may attend either virtually or in person.

If you would like to provide public comment, participate, and/or attend the meeting, please contact Yuridia Zaragoza via email at Yuridia.Zaragoza@colliercountyfl.gov by March 18, 2025, at 4:00 P.M.

You may attend the meeting in person on March 19, 2025, at the CareerSource SWFL Conference Room, 750 South 5th Street, Immokalee, FL 34142.

The public is reminded that the CDC and Department of Health recommend social distancing and avoiding public gatherings when possible.

All meetings will be publicly noticed in the W. Harmon Turner Building (Building F), posted at the Immokalee Public Library, and provided to the County Public Information Department for distribution. Please contact Yuridia Zaragoza at 239.867.0025 for additional information. In accordance with the American with Disabilities Act, persons needing assistance to participate in any of these proceedings should contact Christie Betancourt at least 48 hours before the meeting. The public should be advised that members of the CRA/MSTU Advisory Committee are also members of other Boards and Committees, including, but not limited to: the Immokalee Fire Commission. In this regard, matters coming before the Advisory Committee/Board may come before one or more of the referenced Board and Committees from time to time.

Collier County Community Redevelopment Agency
IMMOKALEE CRA
The Place to Call Home!

MINUTES

Joint Meeting of the Collier County Community Redevelopment Agency Immokalee Local Redevelopment Advisory Board and the Immokalee MSTU Advisory Committee on February 19, 2025. The Advisory Board members, staff, and public appeared virtually and in person.

Hybrid Remote Public Meeting
CareerSource
750 South 5th Street
Immokalee, FL 34142

A. Call to Order.
The meeting was called to order by CRA Chair Michael "Mike" Facundo at 8:30 A.M.

B. Pledge of Allegiance and Moment of Silence.
Michael "Mike" Facundo led the Pledge of Allegiance and the opening prayer.

C. Roll Call and Announcement of a Quorum.
Christie Betancourt opened roll call. A quorum was announced for the CRA and MSTU Board.

CRA Advisory Board Members Present in Person:
Michael "Mike" Facundo, Lupita Vazquez Reyes, Mark Lemke, Patricia "Anne" Goodnight, Andrea Halman, Estil Null, Yvar Pierre, and Paul Thein (9:50 A.M.).

CRA Advisory Board Members Present via Zoom:
None.

CRA Advisory Board Members Absent/Excused:
Edward "Ski" Olesky.

MSTU Advisory Committee Members Present:
Bernardo Barnhart, Jimmy Nieves, Andrea Halman, Cherryle Thomas and David Turrubiartez Jr (8:44 A.M.).

MSTU Advisory Committee Members Present via Zoom:
None.

MSTU Advisory Committee Members Absent/Excused:
None.

Others Present in Person:
Melissa Silva, Mike Sweely, James Klewicki, Yeimi Ezpinoza, Daniel Flynn, Junela Salguero, Matt Murphy, Linda Ayer, Sol Reyes, Yolanda Flores, Cristina Perez, Clara Herrera, Misty Smith, Said Gomez, Wendy Gallegos, Noemi Perez, and Rafael Campo.

Others Present via Zoom:
Alex Malhas, Edward Conrad, Nancy Gundlach, Sarah Harrington, Sharon Umpenhour, Wayne Arnold, Tricia de Cambria and Therese Everly.

Staff Present in Person: John Dunnuck, Christie Betancourt, Yvonne Blair, Yuridia Zaragoza, and Kizzie Fowler.

D. Voting Privileges for Board Members via Zoom
CRA and MSTU Board members made a motion to allow board members on Zoom privileges.

CRA Action: ***Ms. Patricia "Anne" Goodnight made a motion to allow Board Members on Zoom privileges. Mr. Mark Lemke seconded the motion. 7-0.***

MSTU Action: ***Ms. Andrea Halman made a motion to allow Board Members on Zoom privileges. Mr. Cherryle Thomas seconded the motion, and it passed by a unanimous vote. 4-0.***

E. Approval of Agenda.

Staff presented the Agenda to the Boards for approval.

Staff presented the Agenda to the Boards for approval. Staff announced that they would be mindful of the Immokalee Senior Housing PUDA time certain presentation at 9:30 A.M.

The Agenda was approved as presented.

CRA Action: ***Ms. Andrea Halman made a motion to approve the Agenda as presented. Ms. Patricia Anne Goodnight seconded the motion, and it passed by unanimous vote. 7-0.***

MSTU Action: ***Ms. Andrea Halman. made a motion to approve the Agenda as presented. Ms. Cherryle Thomas seconded the motion, and it passed by unanimous vote. 4-0.***

F. Approval of Consent Agenda

1. Minutes
    a. Joint CRA & MSTU Advisory Board Meeting for January 15, 2025 (Enclosure 1)
2. Budget Reports (Enclosure 2)
3. Code Enforcement Report (Enclosure 3)
4. Staff Reports
    a. Assistant Director Report (Enclosure 4)
    b. Project Manager Report (Enclosure 5)
    c. Project Observation Field Report (Enclosure 6)
    d. Community Meetings (Enclosure 7)

Staff presented the Consent Agenda to the Boards for approval.

Ms. Andrea Halman commented on Packet Page 19, which is the Minutes for the Joint CRA and MSTU Advisory Board Meeting for January 15, 2025, and said that she would like to add that she would like someone from the Immokalee community to join the Bicycle and Pedestrian Advisory Committee (BPAC) because she is coming off the board.

The Consent Agenda was approved as amended.

CRA Action: ***Ms. Patricia "Anne" Goodnight made a motion to approve the Consent Agenda as amended. Mr. Mark Lemke seconded the motion, and it passed by unanimous vote. 7-0.***

MSTU Action: ***Mr. Jimmy Nieves made a motion to approve the Consent Agenda as amended. Ms. Andrea Halman seconded the motion, and it passed by unanimous vote. 4-0.***

G. Announcements.

1. Public Comments speaker slips
   CRA Staff reiterated on the public 3-minute speaker slip policy for each Topic. The Board will give more time if they feel it necessary.

2. Parks & Recreation Advisory Board Meeting on 2/19/2025 @6 p.m. (Enclosure 8)
   Staff provided the Parks and Recreation Advisory Board Flyer. The meeting will be held at the Immokalee Community Park on February 19, 2025, at 6 P.M.

   Ms. Christie Betancourt announced the new CRA Intern, Ms. Kizzie Fowler.

   Ms. Kizzie Fowler introduced herself. She is a graduate from the Florida Gulf Coast University. She has learned how the CRA stays connected to the community and hopes to learn more as she continues to her internship.

3. Immokalee High School Beta Club
   Ms. Linda Ayer introduced herself. She has been the Immokalee Beta Sponsor for over 42 years. She briefly commented on Ms. April Goodnight being a part of the Immokalee Beta and the assistance she has received from Mr. Eliud Trejo, who has started a Beta Club at the RCMA in Immokalee.

   Ms. Linda Ayer commented that the Beta Club has served Immokalee for 69 years, this upcoming December will be their 70th Anniversary. They are the oldest organization and sport in the community. She expressed her opinion on the negligence that the organization goes through even though they have been consistent with their efforts to support the community. Due to the amount of service done for the community, the Immokalee High School Beta has received the Grand Slam Award and was selected last year for the John W. Harris Leadership Club.

   Ms. Linda Ayer further discussed the expectation she has for the students that participate in the Immokalee High School Beta Club. Consistency and Excellence are a factor to the success of the club and its members. This year in the State Convention, the Immokalee High School Beta received 46 awards, 9 awards were received for 1st place in academics. Overall, all who are part of the Beta Club are leaders of Immokalee High School. Ms. Ayer reflected on Mr. Matt Richards, who was the 1st State Officer chosen from the Immokalee High School Beta in 1980, and how it has been a record for the Immokalee Beta Club to have an elected State Officer all the following years except for 3. She reiterated on how well the Immokalee Beta Club does in State and National Conventions but commented on the lack of funding they receive. The Immokalee High School Beta Club rely on having fundraisers to make up for the funds needed to travel and attend the Conventions. She provided a brief breakdown of the cost for the students to attend and further commented that she hopes everyone is aware of their mission and is thankful for the support given by the community.

   Mr. Sol Reyes made his speech as the Florida Beta Secretary.

Ms. Andrea Halman commented on the great things that the Immokalee High School Beta and Ms. Linda Ayer have done for the community and said the board should come together to help the students in any way possible especially with funds.

Ms. Linda Ayer provided information on the Quarter Auction fundraiser by the Immokalee High School Beta held at the Immokalee Technical College on April 15, 2025, at 6 p.m. She commented on Ms. Patricia Anne Goodnight carrot cake auctioned last year for $600.

Ms. Lupita Vazquez Reyes commented on whether the CRA could make a difference and assist with providing any type of support for organizations like the Immokalee High School Beta Club. She further commented on cities and towns who make proclamations and give visibility to groups who are making a difference in the community. She wondered if the service hours done by the group could assist staff in providing a draft to show recognition.

Ms. Sarah Harrington commented on the excellence of the Immokalee High School Beta Club and commented that she could find a way to tie this to the Economic Development by taking the number of community service hours that each student has volunteered and then finding the value and explore on how they have contributed to the community. This could then lead for the Immokalee High School to be recognized by the Board of Collier County Commissioners.

Ms. Linda Ayer commented that she is interested in anything that will showcase the Immokalee High School Beta Club due to the fact that they have no publicity.

Ms. Christie Betancourt commented on the assistance provided by the Immokalee Beta Club, especially for events in the community.

Ms. Christie Betancourt and Mr. Bernardo Barnhart commented on their experience with the Immokalee High School Beta Club. They also commented on Mr. Sol Reyes and the leadership trait that he has as a fellow Beta member.

Ms. Patricia Anne Goodnight commented to Ms. Linda Ayer to continue to provide any information in regard to the Immokalee High School Beta Club. She further commented on the leadership of Mr. Mike Facundo, Ms. Christie Betancourt, Mr. Bernardo Barnhart, and Mr. David Turrubiartez Jr.

Ms. Cherryle Thomas commented on the support that has been received by the Immokalee Beta Club, especially for the Christmas Around the World Parade and Gala Event. She thanked them for assisting.

CRA Action: ***Ms. Patricia "Anne" Goodnight made a motion to collaborate with Sarah Harrington and provide a Letter of support or a proclamation for the Immokalee High School Beta. Mr. Mark Lemke seconded the motion, and it passed by unanimous vote. 7-0.***

4. Communications Folder
   Staff reviewed the communication folder with the board and members of the public. The folder included the public notice for the Joint CRA and MSTU meeting, 2025 Immokalee Cattle Drive and Jamboree flyer, 11th Annual Lipman 5K Rin for Backpacks, Arts in Health Theater Classes, Parks and Recreation Region 3 updates, and the Gratitude letter sent out to all who assisted with the Howard Way Celebration.

H. Other Agencies

1. FDOT Updates
   No updates.
2. Other Community Agencies
   Collier County Code Enforcement, Cristina Perez
   Ms. Cristina Perez provided updates on the Neighborhood Cleanup Event. The Event will be on Saturday, March 1, 2025, across the Immokalee Middle School on 504 Charlie Ct. The Sheriff's Department will be assisting with their Weekend Work Program.

   Ms. Perez addressed that the area near Arrowhead has an added fence and a temporary right of way, so staff will not be able to use this area for a cleanup event.

   Ms. Cristina Perez provided information on the Task Force Meetings. The meetings are held the last Monday of every month at 10 a.m. at the Careersource SWFL conference room, until further noticed.

   Ms. Andrea Halman asked Ms. Cristina Perez about the Code Case Report provided by staff.

   Ms. Cristina Perez provided information and said that the report are the new cases opened during the duration of the month. She further provided information on the fees that are given and the process that is done with those who have a case. The most common cases currently in Immokalee have to do with Solar Panels.

   Ms. Lupita Vazquez Reyes asked if the businesses providing services with solar panels were predatory. Ms. Cristina Perez commented that most of those businesses were no longer of services and were most likely not from the area.

   Collier County Metropolitan Planning Organization (MPO), Sean Kingston
   Mr. Sean Kingston provided a few announcements for the MPO and a few opportunities for the Immokalee Community members to participate in the MPO. The MPO is a transportation planning organization for all of Collier County that includes the unincorporated areas and cities.

   Mr. Sean Kingston thanked Ms. Andrea Halman for serving in the Bicycle and Pedestrian Advisory Committee (BPAC) of the MPO. Since 2018, she has contributed much to the development of the bicycle pedestrian network of Collier County. Due to Ms. Halman leaving BPAC, there is a vacancy, if anyone is interested in being part of the BPAC Committee. Mr. Kingston commented that the MPO has 5 committees, 2 of which are citizen committees.

The Citizens Advisory Committees (CAC) is also a part of the MPO and has a vacancy for District 5. The Citizens Advisory Committee is a more generalized committee. The MPO is developing all of their plans and are doing their 5 year update on the Bicycle Pedestrian Plan, Safety Action Plan, and Long Range Transportation Plan. If anyone is interested in joining the CAC, they will need an appointment from Commisioner McDaniel.

Mr. Sean Kingston commented that he is excited about the Immokalee Cattle Drive and Jamboree. He will be there to represent the MPO and share information on the all the plans that are in development.

Ms. Andrea Halman reiterated that she is off the BPAC Board. She further commented on the lighting report done by the MPO and said there is minor lighting in Immokalee. Most who are a part of the BPAC ride their bikes for pleasure, there needs to be someone from Immokalee who can represent due to many community members in Immokalee who ride their bikes as a mean for transportation.

Collier County Growth Management, Sarah Harrington
Ms. Sarah Harrington provided information on the Florida Economic Development Councils week and said this could be a great opportunity to tie with the Immokalee High School Beta Club. The Florida Economic Development Council week occurs from March 17 through March 21, 2025.

Immokalee Water and Sewer District, Misty Smith
Ms. Misty Smith thanked everyone who attended the Groundbreaking Event on the Carson Road Water Treatment Plant.

Ms. Misty Smith provided information on the efforts being made to receive funding for the Immokalee Water and Sewer Projects. Ms. Smith provided information on the Advanced Metering Infrastructure (AMI)/ Smart Utility Project. They plan to start installing smart users that will replace all meters.

Ms. Misty Smith provided informational brochures translated in English, Spanish, and Creole to educate other community members on this AMI Project and the timeline.

Brief discussion was made on having improvement made to help customers see their usage with a mobile app, but Immokalee Water and Sewer District are still not there just yet.

I. Community Presentations

1. Immokalee Senior Housing PUDA, Q Grady Minor & Associates, Wayne Arnold
   The Immokalee Foundation (TIF) Project (Enclosure 9)
   Mr. Wayne Arnold provided an overview of their current progress of the Immokalee Senior Housing PUD. Grady Minor staff are in the process of amending the PUD in order to make provisions for the Immokalee Foundation to expand onto the site. They are also adding a small portion of the site that's currently owned by the Friendship Baptist Church into the PUD.

Mr. Wayne Arnold introduced the Q Grady Minor Project Team, Traffic Engineer, Collier Environmental Consultant and the Architect who is Mr. Michael "Mike" Facundo.

Mr. Wayne Arnold commented that they are under review by the County. The County has issued a Sufficiency Letter and the team has received a few remaining comments. They held a Neighborhood Information Meeting in Immokalee and had a couple of attendees.

Mr. Wayne Arnold provided the Zoning and Location Map. He commented that the RMF-6 small area highlighted in the Map will be added to the PUD. This will become part of the projects water management system. The project was originally approved and was going to be an affordable senior housing project. They only constructed the 1st 30 units of the project and did not take down any of the additional remaining property which is owned by the Friendship Baptist Church. The Q Grady Minor Team is modifying the PUD to remove the provisions for the additional dwelling units, retaining a residential tract that would be for the 30 existing units, and adding uses and standards that would allow for an education facility for the Immokalee Foundation. Provisions are being made for the Friendship Baptist Church to occupy the northern portion of the site behind their existing facility.

Mr. Wayne Arnold commented on the current existing location of the Immokalee Foundation and public schools surrounding the site area. He commented on the importance of the Immokalee Foundation having access to the schools since they do a lot of school programming and also having the students be able to walk to the site.

The overall project acreage is just under 8 acres. A reduction in the number of the dwelling units will be done from 119 to 30. A revision is also being made to the schedule of uses to allow for about 5,000 square foot 200 seat church. Provision has also been made to have a childcare center and 50,000 square feet that for the Immokalee Foundation uses for offices, classroom space, etc.

Mr. Wayne Arnold also presented the Existing Master Plan, which was designated to have a series of residential buildings. Mr. Arnold presented the proposed Master Plan, Draft Preliminary Site Plan, List of Uses, and Proposed Development Standards. He provided brief information on the Immokalee Foundation Building and said it is proposed to be 45 feet zoned height.

Mr. Wayne Arnold provided information on where others could find information on the Project and the contact information if anyone has any questions. They are now waiting to present to the Collier County Planning Commission (CCPC) on March 20, 2025, and the Board of Collier County Commisioner on April 22, 2025.

Ms. Lupita Vazquez Reyes asked when the hearing notices are mailed to the adjacent property owners. Ms. Sharon Umpenhour informed Ms. Reyes that hearing notices are mailed 20 days prior to the hearings.

CRA Staff asked Grady Minor staff to present this project to the board and members of the public to address the project and confirm that this project does not involve senior housing.

Ms. Christie Betancourt commented that Mr. Michael "Mike" Facundo is a part of this project and will not vote on it, but he may comment on it.

Ms. Lupita Vazquez Reyes thanked the presenters for the presentation and further commented on the need to have Senior Housing, however, anchoring the Immokalee Foundation will bring something good to the community.

Ms. Noemi Perez introduced herself, she is the President & CEO of Immokalee Foundation. She was raised in Immokalee and said it is a passion of hers on the work that is done with the Immokalee Foundation. The Immokalee Foundation primarily focuses on after school programming and brings professional development and educational programs. They provide literacy reading to all 5 Elementary schools, Charter school, and a Non-Profit in the community. As for the middle school students, the Immokalee Foundation provides the Career Pathways Program to expose students to the 4 main areas that are in demand in Florida which include Business Management and Entrepreneurship, Healthcare, Education and Human Services, and Engineering and Construction Management. Many of the students who participate receive paid internships and stipends as long as they meet the requirements. They then receive a scholarship once they graduate from the High School. The main goal is to train and keep the students located in Southwest Florida. The success of the Career Pathway is not unnoticed, the Immokalee Foundation has received a National Award. She appreciates all the support and commented that the Immokalee Foundation is building and training the new leaders.

Mr. Michael "Mike" Facundo commented on his experience and seeing how the Immokalee Foundation creates connections to some of the jobs in the community and providing Internship opportunities for the students. He commented on the disadvantage back then on not having an exposure to other areas like architecture but knowing now that Immokalee Foundation creates these opportunities for the students and exposes them to other areas that aren't common is a good thing. He is glad that the Immokalee Foundation is trying to circle back and bring the students back home to further invest in the community.

Ms. Noemi Perez provided information on the Immokalee Foundation Learning Lab and said there is a home that is up for sale, if anyone is interested.

Ms. Andrea Halman commented on the open house done before and information provided on the Immokalee Foundation. Ms. Halman complimented the open house the Immokalee Foundation used to do and asked if they are thinking about doing it again. Ms. Noemi Perez addressed this matter and said they are not doing this yet but as they continue to build, they can look into improving in this matter. Ms. Halman commented on the reaction of the students and how excited they were to showcase what they are doing.

Mr. David Turrubiartez Jr. commented on the impact that the Immokalee Foundation had for him and the community and how his new endeavor has made him go through a full circle moment, especially since he is now managing a construction company and is living in one of the homes at the Immokalee Foundation Learning Lab. He complimented Ms. Noemi Perez and her efforts as the President and CEO of the Immokalee Foundation.

Ms. Christie Betancourt commented on the new endeavor of Mr. David Turrubiartez Jr. and commented due to this, Mr. Turrubiartez has decided to not renew his application as a MSTU Board member and said this is the last meeting he will attend. Staff thanked him and they hope that he can return as a board member.

Ms. Patricia Anne Goodnight commented on Ms. Parker Collier idea of the Horse Trials and how funds were going to be used to provide something good to the community. Ms. Goodnight is glad to see good things happening in the community that were discussed back in the early Nineties.

After much discussion, the CRA and MSTU Board made a motion to provide a letter of support for this project. Mr. Michael "Mike" Facundo recused himself from voting since he is the architect on this project.

CRA Action: ***Ms. Andrea Halman made a motion to provide a Letter of Support for the Immokalee Senior Housing PUDA. Ms. Patricia Anne Goodnight seconded the motion, and it passed by unanimous vote. 6-0.***

MSTU Action: ***Mr. David Turrubiartez Jr. made a motion to provide a Letter of Support for the Immokalee Senior Housing PUDA. Ms. Cherryle Thomas seconded the motion, and it passed by unanimous vote. 5-0.***

2. Casa San Juan Diego Multi-Family Affordable Housing Development (Enclosure 10)
   Mr. Alex Malhas introduced himself, he is the Development Manager at National Development. National Development is the developer for the Casa San Juan Diego. He provided updates since it's been a while since they last presented.

   Casa San Juan Diego is a development of 80 affordable housing units ranging from 22% of the Area Median Income to 60%. This development is a partnership with the Diocese of Venice. The Project will consist of 2- 3 story buildings. One of the buildings will include a clubhouse. Included in the clubhouse will be a computer lab and activity area for tenants to utilize. The location of the development is East of the Wastewater plant and West of the Our Lady of Guadalupe Parish Church.

   Mr. Malhas announced that they have received approval on the credit underwriting report from Florida Housing. They are now starting the closing process. They have also been working with Collier County on some home funds that they were awarded and are going through the underwriting process with them as well. They are moving ahead. The developers are likely to close on this project around April or May of this year, they will start construction shortly after. Construction will take around 12 months, they are excited to get this project moving and getting the units up and running for the community.

   As for the permitting, the developers are working through the state and local permits. They are working through the SDP and ERP permits, which are currently under review by the County and the Water District. Mr. Alex Malhas commented that part of finalizing these permits includes improvements to Boston Ave. The developers will be improving the main access way to the site, which is Boston Ave, between Hancock Street and 9th Street.

The plan is to widen the road and add all the necessary improvements needed to serve as a traversable public road, and then at closing the County will take ownership of that road and maintain it once improvements are complete.

Mr. Alex Malhas commented that they would like to get the Immokalee CRA support on the improvements being made to better support the community. He commented that Immokalee Community Center Development is also being done near their developments, so the Casa San Juan Diego developers want to make sure their improvements align with the Immokalee Community Center project. Mr. Malhas commented that he would like to have an offline conversation with Ms. Christie Betancourt to further discuss the improvements.

Ms. Christie Betancourt asked if any significant changes have been made since the last presentation in April 2024. Mr. Alex Malhas commented that he isn't aware of the last presentation that was made, however, he said there was 3 structures in the beginning, but they have decided to go with 2 structures instead but will have the 80 units. The structures were moved more to the East of the site so that they are away from the Wastewater Treatment Plant. The access way was also moved into the site boundary, so no easements are needed.

Ms. Sarah Harrington confirmed that no significant changes were made from the previous information provided.

Ms. Andrea Halman asked if the developers looked into screens being installed in the balconies. Mr. Alex Malhas commented that he will get a response from his team on this matter and provide the information to Ms. Christie Betancourt.

CRA Action: ***Ms. Andrea Halman made a motion to provide a Letter of Support for the Casa San Juan Diego Multi-family Affordable Housing Development. Mr. Mark Lemke seconded the motion, and it passed by unanimous vote. 7-0.***

3. Community updates
   i. Immokalee Complete Streets (TIGER) Traffic Calming Plans (Enclosure 11)
   Staff provided Enclosure 11, which are the plans for the crosswalks installed on Roberts Ave and Immokalee Drive. Mr. Daniel Flynn and Mr. Matt Murphy with Quality Enterprise were present at the meeting.

   Mr. Matt Murphy provided information on the crosswalks installed. The 3 crosswalks on Immokalee Drive have in place the roadway elements Quilty Enterprise staff are working on the flat work. A temporary striping is over the crosswalks. Quality Enterprise are currently working on the 3 crosswalks on Roberts Ave. By mid-next week, they should be fully complete with the work. Signage and the rapid flash beacons for the crossing will be installed as well.

   Ms. Christie Betancourt complimented Quality Enterprise and their efforts to inform the principal of the Immokalee High School on the work that will be done. This installation was accomplished quicker than anticipated. Staff and board members thanked Quality Enterprise for their work.

Ms. Lupita Vazquez Reyes commented on how these crosswalks make a difference.

Brief discussion was made on the feedback received by the community members.

Mr. Mark Lemke asked if all things installed were crosswalks or speed bumps. Mr. Matt Murphy clarified that 2 of the 6 are crosswalks and the rest are speedbumps.

Mr. David Turrubiartez Jr. asked when the sidewalk will be complete near the crosswalk from the High School to the Immokalee Sports Complex. Mr. Matt Murphy followed up and said it should be complete no later than the upcoming Saturday. It won't be open for pedestrians until the rapid flashing beacons are installed.

Mr. Matt Murphy provided a status update on the CAT Transfer Station and said they should have this complete hopefully at the end of March. Due to an introduction to an aluminum walkway canopy, the engineered calculation came out different so Quality Enterprise are working on this matter and hope to get the items installed or at least delivered in 6 to 8 weeks.

Ms. Christie Betancourt provided information on the lighting. Mr. Matt Murphy commented that out of the 180 proposed, they have done around 170. As for the rest, they are working on the draining structure, which should be done in the next 2 weeks. Lighting then will be complete.

Ms. Lupita Vazquez Reyes commented on the huge impact of the lighting.

Mr. Matt Murphy also gave credit to LCEC and how they installed the lighting relatively quickly.

Ms. Christie Betancourt commented that the Immokalee CRA are receiving the bill for the lighting.

ii. Collier County Sheriff's Office Lighting Survey (Enclosure 12)

Ms. Christie Betancourt provided an overview of the Collier County Sheriff Office Lighting Survey. She commented on the reasoning for completing the survey and said it ensure public safety, crime prevention, identifies dark zones, supports infrastructure planning, improves maintenance efficiency, community engagement, enhances walkability and connectivity, energy and cost efficiency, and supports compliance.

Ms. Christie Betancourt commented that Cpl. James Klewicki met with CRA staff, and they provided him a site map and gave him the areas were community members had concerns about. Cpl. Klewicki also used the 2014 study as guidance and completed the survey report.

Cpl. James Klewicki key findings included darks zones and safety concerns which included poor lighting in some areas, residents feeling unsafe due to low visibility and insufficient sidewalk, crime risks and inconsistent lighting. Ms. Christie Betancourt commented that this survey was well needed, CRA staff will follow through with all recommendations.

The recommendation includes upgrading lights with LED lighting, standardized light spacing, and implement regular maintenance. Staff will create a street lighting action plan and present to the board and prioritize depending on the budget.

Ms. Andrea Halman commented that this report should be shared with the Bicycle Pedestrian Advisory Committee, since they are currently working on their Master Plan.

Ms. Christie Betancourt commented that staff are working to address some items presented first such as a couple of poles that belong to the CRA and MSTU and identifying them into groups based on which need to be repaired, areas that need lighting, and who the owner of the poles are. Staff will bring the item back to prioritize and for a budget recommendation. Ms. Betancourt commented that staff have a map that identifies the lights and who they belong to, but staff would like to be aware of who maintains them. Staff will work on this item with 3 phases which included Identifying Maintenance Responsibilities, Address Lighting Deficiencies and Implementations and Monitoring. Staff will follow up with this item in a future meeting.

Cpl. James Klewicki introduced himself. He is with the Crime Prevention Unit with Collier County Sheriff's Office. He has received special training on how to reduce crime by changing the environment and said lighting is important. He provided information on LED lighting and said LED lighting gives out a bright white light, and with that light you are able to see all colors. Good lighting should help you recognize someone 50 feet from you and notice more of your surroundings. He commented on the high density sodium yellow lights and said that Immokalee has a lot of the older lights. The last lighting survey done was in 2014, staff have done a great job of improving lights in the intersection, however, there are some areas of concerns such as inconsistent spacing in between lights.

Cpl. Klewicki further commented on pedestrian safety, security surveys completed free of charge for businesses and home by the Collier County Sheriff's Office, and the importance of home lighting and landscaping. If anyone has any questions, they may contact the Sheriff's Office or Ms. Christie Betancourt, and she may get in touch with them.

Ms. Christie Betancourt presented the list of light poles with maintenance issues and lack of lighting locations. She will share this listing to all board members. She provided an overview of addressing the lights owned by the CRA and MSTU and looking into who maintains the other lights that need fixing.

Mr. Michael "Mike" Facundo thanked Cpl. James Klewicki and the Sheriff's Department for the comprehensive report. Ms. Christie Betancourt also thanked everyone who was a part of completing this survey and showing the improvements it has made with adding lights.

Ms. Cherryle Thomas commented of the Holiday Decorations lights. Staff informed Ms. Thomas that most of the light involve LED Lighting.

J. Old Business.

1. Advisory Board update
   i. Board Merger
   Staff have received the draft Ordinance and Resolution for the board merger. Staff will bring this item to the boards at the next meeting. The item will most likely go to the Board of Collier County Commissioners Board meeting in March.
   ii. CRA Application
      a. Michael "Mike" Facundo (Enclosure 13)
      Staff commented on the application submitted by Mr. Michel "Mike" Facundo to the Immokalee Local Redevelopment Advisory Board for reappointment. If reappointment is approved, staff will send a recommendation memo to the County Attorney.

CRA Action: ***Ms. Andrea Halman made a motion to reappoint Michael "Mike" Facundo the Immokalee Local Redevelopment Advisory (CRA) Board. Ms. Patricia Anne Goodnight seconded the motion, and it passed by unanimous vote. 8-0.***

      b. CRA Attendance Log (Enclosure 14)
      Staff attached the CRA Board Attendance Log for the last 2 years. Mr. Michael "Mike" Facundo name was bolded on the attendance log.

2. Contractor Maintenance Reports
   i. A&M Property Maintenance Report & Schedule (Enclosure 15)
   Staff provided Enclosure 15, which is the maintenance report and the look ahead for March. Maintenance and schedule are as usual.

   Staff provided information on the contract for the landscape maintenance at Zocalo. This has been seen and approved by the Board of Collier County Commissioners. A&M Property Maintenance will start after staff get everything in place.

3. Brief Staff Project update
   i. Immokalee Sidewalk Phase III – Eustis Ave. and W. Delaware Ave.
   Staff provided an update on the Immokalee Sidewalks Phase III. The contract is ready to be processed to go the Board of Collier County Commissioners. Staff are waiting for Procurement to release the bid package. This is to award the contract to Marquee Development Inc. A sign has been installed near Eustis Ave. and West Delaware Ave, to show that the project will start soon.

   Staff will be requesting permits with LJA Engineering, Inc for this project. A grant was received from the Congressional appropriation funds for $987,000. The construction was a bit over a million, so the CRA will be putting in the funds to cover the cost.

   Due to the grant, Staff will continue to use the term Eustis Ave, although it has been changed to Howard Way.

ii. First Street Corridor Safety Project update

Staff provided an update on the First Street Corridor Safety project. Staff have completed Phase 1. They are finalizing the bid package to be sent out for the construction of Phase 1. Staff are in the process of Change Order #3, to continue the work to end of the project and that includes construction phase 1 and 2. Staff are adding days in order to use 3 grant agreements to get this project moving forward and be completed. Staff are working with the Transportation Department who are overseeing staff grant project. Staff will provide an update at the next meeting.

Ms. Andrea Halman asked on the beacons for the sidewalks. Ms. Christie Betancourt commented that there is a delay to the acquisitions of easements and since it's a grant, staff must go through a process. Ms. Halman commented that community members may need to be reeducated on using the buttons. Staff and board members had a brief discussion on reeducating community members. Ms. Halman commented that BPAC may be able to assist with this matter as well.

Mr. Mark Lemke asked if a sensor could be used instead of buttons for pedestrian crossing. Staff said that they can look into it.

4. Office Lease update

The Immokalee CRA office lease ends July 31st of this year. Staff are hoping to extend the lease with the current tenant or with the new proposed owner. Staff hope to stay in the Careersource building, however, if they are not able to, they are looking into the Immokalee Clerk building or 310 Alachua St. Facility.

Mr. Paul Thein commented that they are working with the broker so that the lease is an extension of the Careersource lease then transferred to them. They are working to keep everyone and shift them into one side. They are also working on filling the other side of the building.

Ms. Cherryle Thomas asked if there are any plans to keep the conference rooms.

Mr. Paul Thein commented that the conference rooms is yet to be determined. They are looking to use this opportunity to use the center as a hub for community benefit.

Ms. Patricia Anne Goodnight commented that the Immokalee CRA is not moving to the courthouse.

K. <u>New Business.</u>

No New Business.

L. <u>Citizen Comments</u>

Ms. Christie Betancourt provided information on the next meeting and said Staff will bring the report on Historic Cemetery from Stantec and they will have a presentation with a project update from El Gran Taco Loco.

Ms. Cherryle Thomas commented that Mr. Mauricio Martinez is interested in becoming a CRA Board member. Staff commented that they will see the outcome of the board merger and see if anyone would like to come off of it.

CRA and MSTU Board members asked that a Joint Meeting be held on March 19, 2025.

M. Next Meeting Date

The CRA Board and MSTU Board will be meeting jointly on Wednesday, **March 19, 2025**, at 8:30 A.M. at CareerSource SWFL.

N. Adjournment

Meeting adjourned at 10:25 A.M.

**** Zoom Meeting chat is attached to the minutes for the record.***

Zoom Chat
February 19, 2025 Joint CRA & MSTU Hybrid Public Meeting

00:40:08 Sean Kingston: MPO has an announcement

Collier County Community Redevelopment Agency

IMMOKALEE CRA

The Place to Call Home!

Certification of Minutes Approval Form

Prepared by:

Christie Betancourt, CRA Assistant Director
Immokalee Community Redevelopment Area

Approved by:

Bernardo Barnhart, Chairman

The Minutes for the February 19, 2025, 2024 MSTU Advisory Committee Meeting were approved by the MSTU Advisory Committee on March 19, 2025, as ~~amended~~ presented.

The next meeting will be a MSTU Advisory Committee meeting and will be held on April 16, 2025, at 8:30 A.M. at CareerSource SWFL.

All meetings will be publicly noticed in the W. Harmon Turner Building (Building F), posted at the Immokalee Public Library and provided to the County Public Information Department for distribution. Please call Christie Betancourt, at 239-867-0028 for additional information. In accordance with the American with Disabilities Act, persons needing assistance to participate in any of these proceedings should contact Christie Betancourt, CRA Assistant Director, at least 48 hours before the meeting. The public should be advised that members of the CRA Advisory Board are also members of the other Boards and Committees, including, but not limited to: Immokalee MSTU Board, Immokalee Fire Commission, and the Collier County Housing Authority; etc. In this regard, matters coming before the Advisory Board may come before one or more of the referenced Board and Committees from time to time.

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliergov.net
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

March 5, 2025

FOR IMMEDIATE RELEASE

Notice of Hybrid Remote Public Meeting
Collier County Community Redevelopment Agency
Immokalee Local Redevelopment Advisory Board
Immokalee Beautification MSTU Advisory Committee
Collier County, Florida

March 19, 2025
8:30 a.m.

Notice is hereby given that the **Immokalee Local Redevelopment Advisory Board** and the **Immokalee Beautification Municipal Service Taxing Unit (MSTU) Advisory Committee** will meet on Wednesday**, March 19th** at **8:30 a.m.** This will be a Hybrid Remote Meeting, and it will be held at the CareerSource SWFL, 750 South 5th Street, Immokalee, Florida. Some of the Board Members and staff may be appearing remotely, with staff present in person. The public may attend either remotely or in person.

Individuals who would like to participate remotely should email Yuridia Zaragoza at Yuridia.Zaragoza@colliercountyfl.gov by March 18th at 4:00 p.m.

The agenda will be posted on the Immokalee CRA's website at https://immokaleecra.com/meetings-information-1.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting of those boards, councils or agencies.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management

Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Yuridia Zaragoza at (239) 867-0025**.**

###

Collier County Community Redevelopment Agency
IMMOKALEE CRA
The Place to Call Home!

CRA Board

Commissioner
William McDaniel Jr.
Co-Chair
District 5

Commissioner
Dan Kowal
Co-Chair
District 4

Commissioner
Burt L. Saunders
District 3

Commissioner
Chris Hall
District 2

Commissioner
Rick LoCastro
District 1

CRA Advisory Board

Mike Facundo
Chairman

Lupita Vazquez Reyes
Vice-Chair

Mark Lemke
Anne Goodnight
Andrea Halman
Estil Null
Edward "Ski" Olesky
Yvar Pierre
Paul Thein

MSTU Advisory Committee

Bernardo Barnhart
Chairman

Jimmy Nieves
Vice- Chair

Andrea Halman
Cherryle Thomas.

CRA Staff

John Dunnuck
Executive Director
Facilities & CRA

Christie Betancourt
CRA Assistant Director

Yvonne Blair
CRA Project Manager

Yuridia Zaragoza
CRA Operations
Support Specialist I

Kizzie Fowler
CRA Intern

Joint Meeting of the Collier County Community Redevelopment Agency Immokalee Local Redevelopment Advisory Board and the Immokalee Beautification MSTU Advisory Committee.

AGENDA
Hybrid Remote Public Meeting
(*Please see details below)

Immokalee CRA
750 South 5th Street
CareerSource SWFL
Immokalee, FL 34142
239.867.0025

March 19, 2025 – 8:30 A.M.

A. Call to Order
B. Pledge of Allegiance and Prayer
C. Roll Call and Announcement of a Quorum
D. Voting Privileges for Board Members via Zoom *(CRA & MSTU Action Item)*
E. Approval of Agenda *(CRA & MSTU Action Item)*
F. Approval of Consent Agenda *(CRA & MSTU Action Item)*
   1. Minutes
      i. Joint CRA & MSTU Advisory Board Meeting for February 19, 2025 (Enclosure 1)
   2. Budget Reports (Enclosure 2)
   3. Code Enforcement Report (Enclosure 3)
   4. Staff Reports
      i. Assistant Director Report (Enclosure 4)
      ii. Project Manager Report (Enclosure 5)
      iii. Project Manager Field Observation Report (Enclosure 6)
      iv. Community Meetings (Enclosure 7)
G. Announcements
   1. Public Comment speaker slips
   2. Communications Folder
   3. CRA Budget Workshop date
H. Other Agencies
   1. FDOT updates
   2. Other Community Agencies
I. Community Presentations *(CRA Action Items)*
   1. El Gran Taco Loco Restaurant (Enclosure 8)
   2. Sainvilus Subdivision (Enclosure 9)
   3. Immokalee Community Campus (Enclosure 10)
   4. Community updates
J. New Business
   1. 2024 CRA Annual Report – DRAFT (Enclosure 11) *(CRA & MSTU Action Item)*
   2. Property Available for County Use (Enclosure 12) *(CRA Action Item)*
K. Old Business
   1. Advisory Board update
   2. Board Merger (Enclosure 13) *(CRA & MSTU Action Item)*

3. Contactor Maintenance Reports
    i. A&M Property Maintenance Report & Schedule (Enclosure 14)
4. Collier County Sherriff Office Lighting Survey
    i. Lighting Study Action Plan (Enclosure 15)
5. Brief Staff project update
    i. Immokalee Sidewalk Phase III – Eustis Ave. and W. Delaware Ave.
    ii. First Street Corridor Safety Project update
    iii. Immokalee Historic Cemetery update
6. Office Lease update

L. Citizen Comments

M. Next Meeting Date

The **CRA Board** will be meeting jointly with the **MSTU Board** on ***Wednesday, April 16, 2025,*** at 8:30 A.M. at CareerSource SWFL.

N. Adjournment

*** Hybrid Remote Public Meeting**

Some Advisory Board members and staff may be appearing remotely, with staff present in person. The public may attend either virtually or in person.

If you would like to provide public comment, participate, and/or attend the meeting, please contact Yuridia Zaragoza via email at Yuridia.Zaragoza@colliercountyfl.gov by March 18, 2025, at 4:00 P.M.

You may attend the meeting in person on March 19, 2025, at the CareerSource SWFL Conference Room, 750 South 5th Street, Immokalee, FL 34142.

The public is reminded that the CDC and Department of Health recommend social distancing and avoiding public gatherings when possible.

All meetings will be publicly noticed in the W. Harmon Turner Building (Building F), posted at the Immokalee Public Library, and provided to the County Public Information Department for distribution. Please contact Yuridia Zaragoza at 239.867.0025 for additional information. In accordance with the American with Disabilities Act, persons needing assistance to participate in any of these proceedings should contact Christie Betancourt at least 48 hours before the meeting. The public should be advised that members of the CRA/MSTU Advisory Committee are also members of other Boards and Committees, including, but not limited to: the Immokalee Fire Commission. In this regard, matters coming before the Advisory Committee/Board may come before one or more of the referenced Board and Committees from time to time.

Collier County Community Redevelopment Agency
IMMOKALEE CRA
The Place to Call Home!

MINUTES

Joint Meeting of the Collier County Community Redevelopment Agency Immokalee Local Redevelopment Advisory Board and the Immokalee MSTU Advisory Committee on February 19, 2025. The Advisory Board members, staff, and public appeared virtually and in person.

Hybrid Remote Public Meeting
CareerSource
750 South 5th Street
Immokalee, FL 34142

A. Call to Order.
The meeting was called to order by CRA Chair Michael "Mike" Facundo at 8:30 A.M.

B. Pledge of Allegiance and Moment of Silence.
Michael "Mike" Facundo led the Pledge of Allegiance and the opening prayer.

C. Roll Call and Announcement of a Quorum.
Christie Betancourt opened roll call. A quorum was announced for the CRA and MSTU Board.

CRA Advisory Board Members Present in Person:
Michael "Mike" Facundo, Lupita Vazquez Reyes, Mark Lemke, Patricia "Anne" Goodnight, Andrea Halman, Estil Null, Yvar Pierre, and Paul Thein (9:50 A.M.).

CRA Advisory Board Members Present via Zoom:
None.

CRA Advisory Board Members Absent/Excused:
Edward "Ski" Olesky.

MSTU Advisory Committee Members Present:
Bernardo Barnhart, Jimmy Nieves, Andrea Halman, Cherryle Thomas and David Turrubiartez Jr (8:44 A.M.).

MSTU Advisory Committee Members Present via Zoom:
None.

MSTU Advisory Committee Members Absent/Excused:
None.

Others Present in Person:
Melissa Silva, Mike Sweely, James Klewicki, Yeimi Ezpinoza, Daniel Flynn, Junela Salguero, Matt Murphy, Linda Ayer, Sol Reyes, Yolanda Flores, Cristina Perez, Clara Herrera, Misty Smith, Said Gomez, Wendy Gallegos, Noemi Perez, and Rafael Campo.

Others Present via Zoom:
Alex Malhas, Edward Conrad, Nancy Gundlach, Sarah Harrington, Sharon Umpenhour, Wayne Arnold, Tricia de Cambria and Therese Everly.

Staff Present in Person: John Dunnuck, Christie Betancourt, Yvonne Blair, Yuridia Zaragoza, and Kizzie Fowler.

D. Voting Privileges for Board Members via Zoom
CRA and MSTU Board members made a motion to allow board members on Zoom privileges.

CRA Action: ***Ms. Patricia "Anne" Goodnight made a motion to allow Board Members on Zoom privileges. Mr. Mark Lemke seconded the motion. 7-0.***

MSTU Action: ***Ms. Andrea Halman made a motion to allow Board Members on Zoom privileges. Mr. Cherryle Thomas seconded the motion, and it passed by a unanimous vote. 4-0.***

E. Approval of Agenda.

Staff presented the Agenda to the Boards for approval.

Staff presented the Agenda to the Boards for approval. Staff announced that they would be mindful of the Immokalee Senior Housing PUDA time certain presentation at 9:30 A.M.

The Agenda was approved as presented.

CRA Action: ***Ms. Andrea Halman made a motion to approve the Agenda as presented. Ms. Patricia Anne Goodnight seconded the motion, and it passed by unanimous vote. 7-0.***

MSTU Action: ***Ms. Andrea Halman. made a motion to approve the Agenda as presented. Ms. Cherryle Thomas seconded the motion, and it passed by unanimous vote. 4-0.***

F. Approval of Consent Agenda

1. Minutes
    a. Joint CRA & MSTU Advisory Board Meeting for January 15, 2025 (Enclosure 1)
2. Budget Reports (Enclosure 2)
3. Code Enforcement Report (Enclosure 3)
4. Staff Reports
    a. Assistant Director Report (Enclosure 4)
    b. Project Manager Report (Enclosure 5)
    c. Project Observation Field Report (Enclosure 6)
    d. Community Meetings (Enclosure 7)

Staff presented the Consent Agenda to the Boards for approval.

Ms. Andrea Halman commented on Packet Page 19, which is the Minutes for the Joint CRA and MSTU Advisory Board Meeting for January 15, 2025, and said that she would like to add that she would like someone from the Immokalee community to join the Bicycle and Pedestrian Advisory Committee (BPAC) because she is coming off the board.

The Consent Agenda was approved as amended.

CRA Action: ***Ms. Patricia "Anne" Goodnight made a motion to approve the Consent Agenda as amended. Mr. Mark Lemke seconded the motion, and it passed by unanimous vote. 7-0.***

MSTU Action: ***Mr. Jimmy Nieves made a motion to approve the Consent Agenda as amended. Ms. Andrea Halman seconded the motion, and it passed by unanimous vote. 4-0.***

G. Announcements.

1. Public Comments speaker slips
   CRA Staff reiterated on the public 3-minute speaker slip policy for each Topic. The Board will give more time if they feel it necessary.

2. Parks & Recreation Advisory Board Meeting on 2/19/2025 @6 p.m. (Enclosure 8)
   Staff provided the Parks and Recreation Advisory Board Flyer. The meeting will be held at the Immokalee Community Park on February 19, 2025, at 6 P.M.

   Ms. Christie Betancourt announced the new CRA Intern, Ms. Kizzie Fowler.

   Ms. Kizzie Fowler introduced herself. She is a graduate from the Florida Gulf Coast University. She has learned how the CRA stays connected to the community and hopes to learn more as she continues to her internship.

3. Immokalee High School Beta Club
   Ms. Linda Ayer introduced herself. She has been the Immokalee Beta Sponsor for over 42 years. She briefly commented on Ms. April Goodnight being a part of the Immokalee Beta and the assistance she has received from Mr. Eliud Trejo, who has started a Beta Club at the RCMA in Immokalee.

   Ms. Linda Ayer commented that the Beta Club has served Immokalee for 69 years, this upcoming December will be their 70th Anniversary. They are the oldest organization and sport in the community. She expressed her opinion on the negligence that the organization goes through even though they have been consistent with their efforts to support the community. Due to the amount of service done for the community, the Immokalee High School Beta has received the Grand Slam Award and was selected last year for the John W. Harris Leadership Club.

   Ms. Linda Ayer further discussed the expectation she has for the students that participate in the Immokalee High School Beta Club. Consistency and Excellence are a factor to the success of the club and its members. This year in the State Convention, the Immokalee High School Beta received 46 awards, 9 awards were received for 1st place in academics. Overall, all who are part of the Beta Club are leaders of Immokalee High School. Ms. Ayer reflected on Mr. Matt Richards, who was the 1st State Officer chosen from the Immokalee High School Beta in 1980, and how it has been a record for the Immokalee Beta Club to have an elected State Officer all the following years except for 3. She reiterated on how well the Immokalee Beta Club does in State and National Conventions but commented on the lack of funding they receive. The Immokalee High School Beta Club rely on having fundraisers to make up for the funds needed to travel and attend the Conventions. She provided a brief breakdown of the cost for the students to attend and further commented that she hopes everyone is aware of their mission and is thankful for the support given by the community.

   Mr. Sol Reyes made his speech as the Florida Beta Secretary.

Ms. Andrea Halman commented on the great things that the Immokalee High School Beta and Ms. Linda Ayer have done for the community and said the board should come together to help the students in any way possible especially with funds.

Ms. Linda Ayer provided information on the Quarter Auction fundraiser by the Immokalee High School Beta held at the Immokalee Technical College on April 15, 2025, at 6 p.m. She commented on Ms. Patricia Anne Goodnight carrot cake auctioned last year for $600.

Ms. Lupita Vazquez Reyes commented on whether the CRA could make a difference and assist with providing any type of support for organizations like the Immokalee High School Beta Club. She further commented on cities and towns who make proclamations and give visibility to groups who are making a difference in the community. She wondered if the service hours done by the group could assist staff in providing a draft to show recognition.

Ms. Sarah Harrington commented on the excellence of the Immokalee High School Beta Club and commented that she could find a way to tie this to the Economic Development by taking the number of community service hours that each student has volunteered and then finding the value and explore on how they have contributed to the community. This could then lead for the Immokalee High School to be recognized by the Board of Collier County Commissioners.

Ms. Linda Ayer commented that she is interested in anything that will showcase the Immokalee High School Beta Club due to the fact that they have no publicity.

Ms. Christie Betancourt commented on the assistance provided by the Immokalee Beta Club, especially for events in the community.

Ms. Christie Betancourt and Mr. Bernardo Barnhart commented on their experience with the Immokalee High School Beta Club. They also commented on Mr. Sol Reyes and the leadership trait that he has as a fellow Beta member.

Ms. Patricia Anne Goodnight commented to Ms. Linda Ayer to continue to provide any information in regard to the Immokalee High School Beta Club. She further commented on the leadership of Mr. Mike Facundo, Ms. Christie Betancourt, Mr. Bernardo Barnhart, and Mr. David Turrubiartez Jr.

Ms. Cherryle Thomas commented on the support that has been received by the Immokalee Beta Club, especially for the Christmas Around the World Parade and Gala Event. She thanked them for assisting.

CRA Action: ***Ms. Patricia "Anne" Goodnight made a motion to collaborate with Sarah Harrington and provide a Letter of support or a proclamation for the Immokalee High School Beta. Mr. Mark Lemke seconded the motion, and it passed by unanimous vote. 7-0.***

4. Communications Folder
   Staff reviewed the communication folder with the board and members of the public. The folder included the public notice for the Joint CRA and MSTU meeting, 2025 Immokalee Cattle Drive and Jamboree flyer, 11th Annual Lipman 5K Rin for Backpacks, Arts in Health Theater Classes, Parks and Recreation Region 3 updates, and the Gratitude letter sent out to all who assisted with the Howard Way Celebration.

H. Other Agencies

1. FDOT Updates
   No updates.
2. Other Community Agencies
   Collier County Code Enforcement, Cristina Perez
   Ms. Cristina Perez provided updates on the Neighborhood Cleanup Event. The Event will be on Saturday, March 1, 2025, across the Immokalee Middle School on 504 Charlie Ct. The Sheriff's Department will be assisting with their Weekend Work Program.

   Ms. Perez addressed that the area near Arrowhead has an added fence and a temporary right of way, so staff will not be able to use this area for a cleanup event.

   Ms. Cristina Perez provided information on the Task Force Meetings. The meetings are held the last Monday of every month at 10 a.m. at the Careersource SWFL conference room, until further noticed.

   Ms. Andrea Halman asked Ms. Cristina Perez about the Code Case Report provided by staff.

   Ms. Cristina Perez provided information and said that the report are the new cases opened during the duration of the month. She further provided information on the fees that are given and the process that is done with those who have a case. The most common cases currently in Immokalee have to do with Solar Panels.

   Ms. Lupita Vazquez Reyes asked if the businesses providing services with solar panels were predatory. Ms. Cristina Perez commented that most of those businesses were no longer of services and were most likely not from the area.

   Collier County Metropolitan Planning Organization (MPO), Sean Kingston
   Mr. Sean Kingston provided a few announcements for the MPO and a few opportunities for the Immokalee Community members to participate in the MPO. The MPO is a transportation planning organization for all of Collier County that includes the unincorporated areas and cities.

   Mr. Sean Kingston thanked Ms. Andrea Halman for serving in the Bicycle and Pedestrian Advisory Committee (BPAC) of the MPO. Since 2018, she has contributed much to the development of the bicycle pedestrian network of Collier County. Due to Ms. Halman leaving BPAC, there is a vacancy, if anyone is interested in being part of the BPAC Committee. Mr. Kingston commented that the MPO has 5 committees, 2 of which are citizen committees.

The Citizens Advisory Committees (CAC) is also a part of the MPO and has a vacancy for District 5. The Citizens Advisory Committee is a more generalized committee. The MPO is developing all of their plans and are doing their 5 year update on the Bicycle Pedestrian Plan, Safety Action Plan, and Long Range Transportation Plan. If anyone is interested in joining the CAC, they will need an appointment from Commisioner McDaniel.

Mr. Sean Kingston commented that he is excited about the Immokalee Cattle Drive and Jamboree. He will be there to represent the MPO and share information on the all the plans that are in development.

Ms. Andrea Halman reiterated that she is off the BPAC Board. She further commented on the lighting report done by the MPO and said there is minor lighting in Immokalee. Most who are a part of the BPAC ride their bikes for pleasure, there needs to be someone from Immokalee who can represent due to many community members in Immokalee who ride their bikes as a mean for transportation.

Collier County Growth Management, Sarah Harrington
Ms. Sarah Harrington provided information on the Florida Economic Development Councils week and said this could be a great opportunity to tie with the Immokalee High School Beta Club. The Florida Economic Development Council week occurs from March 17 through March 21, 2025.

Immokalee Water and Sewer District, Misty Smith
Ms. Misty Smith thanked everyone who attended the Groundbreaking Event on the Carson Road Water Treatment Plant.

Ms. Misty Smith provided information on the efforts being made to receive funding for the Immokalee Water and Sewer Projects. Ms. Smith provided information on the Advanced Metering Infrastructure (AMI)/ Smart Utility Project. They plan to start installing smart users that will replace all meters.

Ms. Misty Smith provided informational brochures translated in English, Spanish, and Creole to educate other community members on this AMI Project and the timeline.

Brief discussion was made on having improvement made to help customers see their usage with a mobile app, but Immokalee Water and Sewer District are still not there just yet.

I. Community Presentations

1. Immokalee Senior Housing PUDA, Q Grady Minor & Associates, Wayne Arnold
   The Immokalee Foundation (TIF) Project (Enclosure 9)
   Mr. Wayne Arnold provided an overview of their current progress of the Immokalee Senior Housing PUD. Grady Minor staff are in the process of amending the PUD in order to make provisions for the Immokalee Foundation to expand onto the site. They are also adding a small portion of the site that's currently owned by the Friendship Baptist Church into the PUD.

Mr. Wayne Arnold introduced the Q Grady Minor Project Team, Traffic Engineer, Collier Environmental Consultant and the Architect who is Mr. Michael "Mike" Facundo.

Mr. Wayne Arnold commented that they are under review by the County. The County has issued a Sufficiency Letter and the team has received a few remaining comments. They held a Neighborhood Information Meeting in Immokalee and had a couple of attendees.

Mr. Wayne Arnold provided the Zoning and Location Map. He commented that the RMF-6 small area highlighted in the Map will be added to the PUD. This will become part of the projects water management system. The project was originally approved and was going to be an affordable senior housing project. They only constructed the 1st 30 units of the project and did not take down any of the additional remaining property which is owned by the Friendship Baptist Church. The Q Grady Minor Team is modifying the PUD to remove the provisions for the additional dwelling units, retaining a residential tract that would be for the 30 existing units, and adding uses and standards that would allow for an education facility for the Immokalee Foundation. Provisions are being made for the Friendship Baptist Church to occupy the northern portion of the site behind their existing facility.

Mr. Wayne Arnold commented on the current existing location of the Immokalee Foundation and public schools surrounding the site area. He commented on the importance of the Immokalee Foundation having access to the schools since they do a lot of school programming and also having the students be able to walk to the site.

The overall project acreage is just under 8 acres. A reduction in the number of the dwelling units will be done from 119 to 30. A revision is also being made to the schedule of uses to allow for about 5,000 square foot 200 seat church. Provision has also been made to have a childcare center and 50,000 square feet that for the Immokalee Foundation uses for offices, classroom space, etc.

Mr. Wayne Arnold also presented the Existing Master Plan, which was designated to have a series of residential buildings. Mr. Arnold presented the proposed Master Plan, Draft Preliminary Site Plan, List of Uses, and Proposed Development Standards. He provided brief information on the Immokalee Foundation Building and said it is proposed to be 45 feet zoned height.

Mr. Wayne Arnold provided information on where others could find information on the Project and the contact information if anyone has any questions. They are now waiting to present to the Collier County Planning Commission (CCPC) on March 20, 2025, and the Board of Collier County Commisioner on April 22, 2025.

Ms. Lupita Vazquez Reyes asked when the hearing notices are mailed to the adjacent property owners. Ms. Sharon Umpenhour informed Ms. Reyes that hearing notices are mailed 20 days prior to the hearings.

CRA Staff asked Grady Minor staff to present this project to the board and members of the public to address the project and confirm that this project does not involve senior housing.

Ms. Christie Betancourt commented that Mr. Michael "Mike" Facundo is a part of this project and will not vote on it, but he may comment on it.

Ms. Lupita Vazquez Reyes thanked the presenters for the presentation and further commented on the need to have Senior Housing, however, anchoring the Immokalee Foundation will bring something good to the community.

Ms. Noemi Perez introduced herself, she is the President & CEO of Immokalee Foundation. She was raised in Immokalee and said it is a passion of hers on the work that is done with the Immokalee Foundation. The Immokalee Foundation primarily focuses on after school programming and brings professional development and educational programs. They provide literacy reading to all 5 Elementary schools, Charter school, and a Non-Profit in the community. As for the middle school students, the Immokalee Foundation provides the Career Pathways Program to expose students to the 4 main areas that are in demand in Florida which include Business Management and Entrepreneurship, Healthcare, Education and Human Services, and Engineering and Construction Management. Many of the students who participate receive paid internships and stipends as long as they meet the requirements. They then receive a scholarship once they graduate from the High School. The main goal is to train and keep the students located in Southwest Florida. The success of the Career Pathway is not unnoticed, the Immokalee Foundation has received a National Award. She appreciates all the support and commented that the Immokalee Foundation is building and training the new leaders.

Mr. Michael "Mike" Facundo commented on his experience and seeing how the Immokalee Foundation creates connections to some of the jobs in the community and providing Internship opportunities for the students. He commented on the disadvantage back then on not having an exposure to other areas like architecture but knowing now that Immokalee Foundation creates these opportunities for the students and exposes them to other areas that aren't common is a good thing. He is glad that the Immokalee Foundation is trying to circle back and bring the students back home to further invest in the community.

Ms. Noemi Perez provided information on the Immokalee Foundation Learning Lab and said there is a home that is up for sale, if anyone is interested.

Ms. Andrea Halman commented on the open house done before and information provided on the Immokalee Foundation. Ms. Halman complimented the open house the Immokalee Foundation used to do and asked if they are thinking about doing it again. Ms. Noemi Perez addressed this matter and said they are not doing this yet but as they continue to build, they can look into improving in this matter. Ms. Halman commented on the reaction of the students and how excited they were to showcase what they are doing.

Mr. David Turrubiartez Jr. commented on the impact that the Immokalee Foundation had for him and the community and how his new endeavor has made him go through a full circle moment, especially since he is now managing a construction company and is living in one of the homes at the Immokalee Foundation Learning Lab. He complimented Ms. Noemi Perez and her efforts as the President and CEO of the Immokalee Foundation.

Ms. Christie Betancourt commented on the new endeavor of Mr. David Turrubiartez Jr. and commented due to this, Mr. Turrubiartez has decided to not renew his application as a MSTU Board member and said this is the last meeting he will attend. Staff thanked him and they hope that he can return as a board member.

Ms. Patricia Anne Goodnight commented on Ms. Parker Collier idea of the Horse Trials and how funds were going to be used to provide something good to the community. Ms. Goodnight is glad to see good things happening in the community that were discussed back in the early Nineties.

After much discussion, the CRA and MSTU Board made a motion to provide a letter of support for this project. Mr. Michael "Mike" Facundo recused himself from voting since he is the architect on this project.

CRA Action: ***Ms. Andrea Halman made a motion to provide a Letter of Support for the Immokalee Senior Housing PUDA. Ms. Patricia Anne Goodnight seconded the motion, and it passed by unanimous vote. 6-0.***

MSTU Action: ***Mr. David Turrubiartez Jr. made a motion to provide a Letter of Support for the Immokalee Senior Housing PUDA. Ms. Cherryle Thomas seconded the motion, and it passed by unanimous vote. 5-0.***

2. Casa San Juan Diego Multi-Family Affordable Housing Development (Enclosure 10)
   Mr. Alex Malhas introduced himself, he is the Development Manager at National Development. National Development is the developer for the Casa San Juan Diego. He provided updates since it's been a while since they last presented.

   Casa San Juan Diego is a development of 80 affordable housing units ranging from 22% of the Area Median Income to 60%. This development is a partnership with the Diocese of Venice. The Project will consist of 2- 3 story buildings. One of the buildings will include a clubhouse. Included in the clubhouse will be a computer lab and activity area for tenants to utilize. The location of the development is East of the Wastewater plant and West of the Our Lady of Guadalupe Parish Church.

   Mr. Malhas announced that they have received approval on the credit underwriting report from Florida Housing. They are now starting the closing process. They have also been working with Collier County on some home funds that they were awarded and are going through the underwriting process with them as well. They are moving ahead. The developers are likely to close on this project around April or May of this year, they will start construction shortly after. Construction will take around 12 months, they are excited to get this project moving and getting the units up and running for the community.

   As for the permitting, the developers are working through the state and local permits. They are working through the SDP and ERP permits, which are currently under review by the County and the Water District. Mr. Alex Malhas commented that part of finalizing these permits includes improvements to Boston Ave. The developers will be improving the main access way to the site, which is Boston Ave, between Hancock Street and 9th Street.

The plan is to widen the road and add all the necessary improvements needed to serve as a traversable public road, and then at closing the County will take ownership of that road and maintain it once improvements are complete.

Mr. Alex Malhas commented that they would like to get the Immokalee CRA support on the improvements being made to better support the community. He commented that Immokalee Community Center Development is also being done near their developments, so the Casa San Juan Diego developers want to make sure their improvements align with the Immokalee Community Center project. Mr. Malhas commented that he would like to have an offline conversation with Ms. Christie Betancourt to further discuss the improvements.

Ms. Christie Betancourt asked if any significant changes have been made since the last presentation in April 2024. Mr. Alex Malhas commented that he isn't aware of the last presentation that was made, however, he said there was 3 structures in the beginning, but they have decided to go with 2 structures instead but will have the 80 units. The structures were moved more to the East of the site so that they are away from the Wastewater Treatment Plant. The access way was also moved into the site boundary, so no easements are needed.

Ms. Sarah Harrington confirmed that no significant changes were made from the previous information provided.

Ms. Andrea Halman asked if the developers looked into screens being installed in the balconies. Mr. Alex Malhas commented that he will get a response from his team on this matter and provide the information to Ms. Christie Betancourt.

CRA Action: ***Ms. Andrea Halman made a motion to provide a Letter of Support for the Casa San Juan Diego Multi-family Affordable Housing Development. Mr. Mark Lemke seconded the motion, and it passed by unanimous vote. 7-0.***

3. Community updates
   i. Immokalee Complete Streets (TIGER) Traffic Calming Plans (Enclosure 11)
   Staff provided Enclosure 11, which are the plans for the crosswalks installed on Roberts Ave and Immokalee Drive. Mr. Daniel Flynn and Mr. Matt Murphy with Quality Enterprise were present at the meeting.

   Mr. Matt Murphy provided information on the crosswalks installed. The 3 crosswalks on Immokalee Drive have in place the roadway elements Quilty Enterprise staff are working on the flat work. A temporary striping is over the crosswalks. Quality Enterprise are currently working on the 3 crosswalks on Roberts Ave. By mid-next week, they should be fully complete with the work. Signage and the rapid flash beacons for the crossing will be installed as well.

   Ms. Christie Betancourt complimented Quality Enterprise and their efforts to inform the principal of the Immokalee High School on the work that will be done. This installation was accomplished quicker than anticipated. Staff and board members thanked Quality Enterprise for their work.

Ms. Lupita Vazquez Reyes commented on how these crosswalks make a difference.

Brief discussion was made on the feedback received by the community members.

Mr. Mark Lemke asked if all things installed were crosswalks or speed bumps. Mr. Matt Murphy clarified that 2 of the 6 are crosswalks and the rest are speedbumps.

Mr. David Turrubiartez Jr. asked when the sidewalk will be complete near the crosswalk from the High School to the Immokalee Sports Complex. Mr. Matt Murphy followed up and said it should be complete no later than the upcoming Saturday. It won't be open for pedestrians until the rapid flashing beacons are installed.

Mr. Matt Murphy provided a status update on the CAT Transfer Station and said they should have this complete hopefully at the end of March. Due to an introduction to an aluminum walkway canopy, the engineered calculation came out different so Quality Enterprise are working on this matter and hope to get the items installed or at least delivered in 6 to 8 weeks.

Ms. Christie Betancourt provided information on the lighting. Mr. Matt Murphy commented that out of the 180 proposed, they have done around 170. As for the rest, they are working on the draining structure, which should be done in the next 2 weeks. Lighting then will be complete.

Ms. Lupita Vazquez Reyes commented on the huge impact of the lighting.

Mr. Matt Murphy also gave credit to LCEC and how they installed the lighting relatively quickly.

Ms. Christie Betancourt commented that the Immokalee CRA are receiving the bill for the lighting.

ii. Collier County Sheriff's Office Lighting Survey (Enclosure 12)

Ms. Christie Betancourt provided an overview of the Collier County Sheriff Office Lighting Survey. She commented on the reasoning for completing the survey and said it ensure public safety, crime prevention, identifies dark zones, supports infrastructure planning, improves maintenance efficiency, community engagement, enhances walkability and connectivity, energy and cost efficiency, and supports compliance.

Ms. Christie Betancourt commented that Cpl. James Klewicki met with CRA staff, and they provided him a site map and gave him the areas were community members had concerns about. Cpl. Klewicki also used the 2014 study as guidance and completed the survey report.

Cpl. James Klewicki key findings included darks zones and safety concerns which included poor lighting in some areas, residents feeling unsafe due to low visibility and insufficient sidewalk, crime risks and inconsistent lighting. Ms. Christie Betancourt commented that this survey was well needed, CRA staff will follow through with all recommendations.

The recommendation includes upgrading lights with LED lighting, standardized light spacing, and implement regular maintenance. Staff will create a street lighting action plan and present to the board and prioritize depending on the budget.

Ms. Andrea Halman commented that this report should be shared with the Bicycle Pedestrian Advisory Committee, since they are currently working on their Master Plan.

Ms. Christie Betancourt commented that staff are working to address some items presented first such as a couple of poles that belong to the CRA and MSTU and identifying them into groups based on which need to be repaired, areas that need lighting, and who the owner of the poles are. Staff will bring the item back to prioritize and for a budget recommendation. Ms. Betancourt commented that staff have a map that identifies the lights and who they belong to, but staff would like to be aware of who maintains them. Staff will work on this item with 3 phases which included Identifying Maintenance Responsibilities, Address Lighting Deficiencies and Implementations and Monitoring. Staff will follow up with this item in a future meeting.

Cpl. James Klewicki introduced himself. He is with the Crime Prevention Unit with Collier County Sheriff's Office. He has received special training on how to reduce crime by changing the environment and said lighting is important. He provided information on LED lighting and said LED lighting gives out a bright white light, and with that light you are able to see all colors. Good lighting should help you recognize someone 50 feet from you and notice more of your surroundings. He commented on the high density sodium yellow lights and said that Immokalee has a lot of the older lights. The last lighting survey done was in 2014, staff have done a great job of improving lights in the intersection, however, there are some areas of concerns such as inconsistent spacing in between lights.

Cpl. Klewicki further commented on pedestrian safety, security surveys completed free of charge for businesses and home by the Collier County Sheriff's Office, and the importance of home lighting and landscaping. If anyone has any questions, they may contact the Sheriff's Office or Ms. Christie Betancourt, and she may get in touch with them.

Ms. Christie Betancourt presented the list of light poles with maintenance issues and lack of lighting locations. She will share this listing to all board members. She provided an overview of addressing the lights owned by the CRA and MSTU and looking into who maintains the other lights that need fixing.

Mr. Michael "Mike" Facundo thanked Cpl. James Klewicki and the Sheriff's Department for the comprehensive report. Ms. Christie Betancourt also thanked everyone who was a part of completing this survey and showing the improvements it has made with adding lights.

Ms. Cherryle Thomas commented of the Holiday Decorations lights. Staff informed Ms. Thomas that most of the light involve LED Lighting.

J. Old Business.

1. Advisory Board update
   i. Board Merger
   Staff have received the draft Ordinance and Resolution for the board merger. Staff will bring this item to the boards at the next meeting. The item will most likely go to the Board of Collier County Commissioners Board meeting in March.
   ii. CRA Application
      a. Michael "Mike" Facundo (Enclosure 13)
      Staff commented on the application submitted by Mr. Michel "Mike" Facundo to the Immokalee Local Redevelopment Advisory Board for reappointment. If reappointment is approved, staff will send a recommendation memo to the County Attorney.

CRA Action: ***Ms. Andrea Halman made a motion to reappoint Michael "Mike" Facundo the Immokalee Local Redevelopment Advisory (CRA) Board. Ms. Patricia Anne Goodnight seconded the motion, and it passed by unanimous vote. 8-0.***

      b. CRA Attendance Log (Enclosure 14)
      Staff attached the CRA Board Attendance Log for the last 2 years. Mr. Michael "Mike" Facundo name was bolded on the attendance log.

2. Contractor Maintenance Reports
   i. A&M Property Maintenance Report & Schedule (Enclosure 15)
   Staff provided Enclosure 15, which is the maintenance report and the look ahead for March. Maintenance and schedule are as usual.

   Staff provided information on the contract for the landscape maintenance at Zocalo. This has been seen and approved by the Board of Collier County Commissioners. A&M Property Maintenance will start after staff get everything in place.

3. Brief Staff Project update
   i. Immokalee Sidewalk Phase III – Eustis Ave. and W. Delaware Ave.
   Staff provided an update on the Immokalee Sidewalks Phase III. The contract is ready to be processed to go the Board of Collier County Commissioners. Staff are waiting for Procurement to release the bid package. This is to award the contract to Marquee Development Inc. A sign has been installed near Eustis Ave. and West Delaware Ave, to show that the project will start soon.

   Staff will be requesting permits with LJA Engineering, Inc for this project. A grant was received from the Congressional appropriation funds for $987,000. The construction was a bit over a million, so the CRA will be putting in the funds to cover the cost.

   Due to the grant, Staff will continue to use the term Eustis Ave, although it has been changed to Howard Way.

ii. First Street Corridor Safety Project update

Staff provided an update on the First Street Corridor Safety project. Staff have completed Phase 1. They are finalizing the bid package to be sent out for the construction of Phase 1. Staff are in the process of Change Order #3, to continue the work to end of the project and that includes construction phase 1 and 2. Staff are adding days in order to use 3 grant agreements to get this project moving forward and be completed. Staff are working with the Transportation Department who are overseeing staff grant project. Staff will provide an update at the next meeting.

Ms. Andrea Halman asked on the beacons for the sidewalks. Ms. Christie Betancourt commented that there is a delay to the acquisitions of easements and since it's a grant, staff must go through a process. Ms. Halman commented that community members may need to be reeducated on using the buttons. Staff and board members had a brief discussion on reeducating community members. Ms. Halman commented that BPAC may be able to assist with this matter as well.

Mr. Mark Lemke asked if a sensor could be used instead of buttons for pedestrian crossing. Staff said that they can look into it.

4. Office Lease update

The Immokalee CRA office lease ends July 31st of this year. Staff are hoping to extend the lease with the current tenant or with the new proposed owner. Staff hope to stay in the Careersource building, however, if they are not able to, they are looking into the Immokalee Clerk building or 310 Alachua St. Facility.

Mr. Paul Thein commented that they are working with the broker so that the lease is an extension of the Careersource lease then transferred to them. They are working to keep everyone and shift them into one side. They are also working on filling the other side of the building.

Ms. Cherryle Thomas asked if there are any plans to keep the conference rooms.

Mr. Paul Thein commented that the conference rooms is yet to be determined. They are looking to use this opportunity to use the center as a hub for community benefit.

Ms. Patricia Anne Goodnight commented that the Immokalee CRA is not moving to the courthouse.

K. New Business.

No New Business.

L. Citizen Comments

Ms. Christie Betancourt provided information on the next meeting and said Staff will bring the report on Historic Cemetery from Stantec and they will have a presentation with a project update from El Gran Taco Loco.

Ms. Cherryle Thomas commented that Mr. Mauricio Martinez is interested in becoming a CRA Board member. Staff commented that they will see the outcome of the board merger and see if anyone would like to come off of it.

CRA and MSTU Board members asked that a Joint Meeting be held on March 19, 2025.

M. Next Meeting Date

The CRA Board and MSTU Board will be meeting jointly on Wednesday, **March 19, 2025**, at 8:30 A.M. at CareerSource SWFL.

N. Adjournment

Meeting adjourned at 10:25 A.M.

**** Zoom Meeting chat is attached to the minutes for the record.***

Zoom Chat
February 19, 2025 Joint CRA & MSTU Hybrid Public Meeting

00:40:08 Sean Kingston: MPO has an announcement

Collier County Community Redevelopment Agency

IMMOKALEE CRA

The Place to Call Home!

Certification of Minutes Approval Form

Prepared by:

Christie Betancourt, CRA Assistant Director
Immokalee Community Redevelopment Area

Approved by:

Michael "Mike" Facundo, Chairman

The Minutes for the February 19, 2025, CRA Advisory Board were approved by the CRA Advisory Board on March 19, 2025, as presented.

The next meeting will be a CRA Advisory Board meeting and will be held on April 16, 2025, at 8:30 A.M. at CareerSource SWFL.

All meetings will be publicly noticed in the W. Harmon Turner Building (Building F), posted at the Immokalee Public Library and provided to the County Public Information Department for distribution. Please call Christie Betancourt, at 239-867-0028 for additional information. In accordance with the American with Disabilities Act, persons needing assistance to participate in any of these proceedings should contact Christie Betancourt, CRA Assistant Director, at least 48 hours before the meeting. The public should be advised that members of the CRA Advisory Board are also members of the other Boards and Committees, including, but not limited to: Immokalee MSTU Board, Immokalee Fire Commission, and the Collier County Housing Authority; etc. In this regard, matters coming before the Advisory Board may come before one or more of the referenced Board and Committees from time to time.

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

February 14, 2025

FOR IMMEDIATE RELEASE

Notice of Hybrid Remote Public Meeting
Lely Beautification MSTU Advisory Committee
Collier County, Florida

February 20, 2025
2:00 p.m.

Notice is hereby given that the **Lely Beautification Municipal Service Taxing Unit (MSTU) Advisory Committee** will meet on **Thursday, February 20, 2025,** at **2:00 p.m.** This will be a Hybrid Remote meeting and held in the Conference Room at the South Regional Library, 8065 Lely Cultural Pkwy, Naples, Florida. The public may participate either remotely or in person.

Individuals who would like to participate remotely should contact Rosio Garcia at Rosio.Garcia@colliercountyfl.gov by noon on February 20.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

The agenda will be available on the Collier County Government website at https://www.collierptne.com/mtsu/lely-golf-estates-beautification-advisory-committee/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Dan Schumacher at (239) 252-5775.

###

GOLF ESTATES BEAUTIFICATION MSTU

ADVISORY COMMITTEE

8300 Radio Road
Naples, FL 34104

AGENDA

FEBRUARY 20TH, 2025

I. CALL TO ORDER

II. ATTENDANCE

-Vacant - Chair
Kathleen Dammert - Vice Chair (10/1/26)
Dimitra Arneson (10/1/26)
Linda Rae Jorgensen (10/1/25)
Lisa McGarity (10/1/25)

Brian Wells – Director, PTNE Division
Dan Schumacher – Project Manager
Rosio Garcia – Operations Coordinator
Michael McGee – McGee & Associates
Armando Yzaguirre – A&M Property Maint.
Wendy Warren – Premier Staffing

III. APPROVAL OF AGENDA

IV. APPROVAL OF MINUTES – JANUARY 16TH, 2025

V. CHAIR'S REPORT

VI. CONTRACTOR REPORTS

- **A. LANDSCAPE ARCHITECT'S REPORT** – McGee & Associates (M&A)
- **B.** Landscape Maintenance – A&M Property Maintenance (A&M)

VII. PROJECT MANAGER'S REPORT – DAN SCHUMACHER

- **A. BUDGET REPORT**
- **B. LIGHTING INSPECTION REPORT**
- **C. Radar Speed Report**
- **D.** Application(s) to the Advisory Committee
  1. Dimitra Arneson – Appointed 2/11/25
  2. Michael Mann

VIII. ONGOING BUSINESS

- **A.** Traffic Signage – Transfer from Lely Civic Assn to the MSTU

IX. NEW BUSINESS

- **A.** Projects

X. COMMITTEE MEMBER COMMENTS

XI. PUBLIC COMMENT

XII. ADJOURNMENT

NEXT MEETING:

MARCH 20TH, 2025 AT 2:00 PM
South Regional Library
8065 Lely Cultural Pkwy
Naples, FL 34113, (239) 252-7542

GOLF ESTATES BEAUTIFICATION MSTU

ADVISORY COMMITTEE

8300 Radio Road
Naples, FL 34104

Minutes

January 16, 2025

I. Call to Order

The meeting was called to order at 2:08 P.M. Roll call was taken, and a quorum of three was established.

II. Attendance

Committee Members: Open Seat, Chair; Kathleen Dammert, Vice Chair; Linda Jorgensen, Lisa McGarity, Open Seat
County Staff: Brian Wells, Director, PTNE Division (Excused); Dan Schumacher, Project Manager, PTNE Division; Rosio Garcia, Operations Analyst, PTNE Division
Contractors: Mike McGee, Landscape Architect, McGee & Associates; Armando Yzaguirre, A&M Property Maintenance; Wendy Warren, Premier Staffing
Others: Dimitra Arneson, Resident; Pat McCabe, Resident

III. Approval of Agenda

Ms. McGarity moved to approve the Agenda of the Lely Golf Estates Beautification MSTU Advisory Committee as presented. Second by Vice Chair Dammert. Carried unanimously 3 - 0.

IV. Approval of Minutes – September 19, 2024, and October 17, 2024

Vice Chair Dammert moved to approve the Lely Golf Estates Beautification MSTU Advisory Committee meeting minutes of September 19, 2024, and October 17, 2024, as presented. Second by Ms. Jorgensen. Carried unanimously 3 - 0.

V. Chair's Report

Summary reports will be provided at future meetings.

VI. Contractor Reports

A. Landscape Architect's Report – McGee & Associates (M&A)

Mr. McGee summarized the January 2, 2025, observation report.
(The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).

Maintenance Areas

1. St. Andrews Blvd.
2. Forest Hills Blvd. & Cart Crossing
3. Valley Stream Circle
4. Pebble Beach Blvd. & Cart Crossing
5. Thorncrest, Briarcliff, and Heather Grove Lanes (cul-de-sacs)
6. Baltusrol Drive & Cart Crossing
7. Doral Circle
8. Rattlesnake Hammock Rd.

Comments

Mr. McGee reported:

All locations

- Palm tree pruning is recommended to remove fronds and seed stalks.
- Recommend replacement of Bougainvilleas and shrubs which suffered wind damage from Hurricane Milton.
- Additional Perennial Peanut plants are recommended in multiple medians.

St. Andrews Blvd. & US 41

- Recommend removal and replacement of two Alexander Palms damaged by lightning with 10- foot clear trunk palms.
- The third large Royal Palm within the shopping center plantings appears to have been struck by lightning. Recommend replacement with an 8-foot gray trunk palm.

St. Andrews Blvd.

- Median #1: Remove the two Foxtail Palms with Ganoderma disease. Plant replacement will be recommended post removal.
- Median #5:
    - Removal of Foxtail Palm with Ganoderma disease is recommended. Replant with 'Helen Johnson' dwarf Bougainvillea.
    - Recommend 1 Queen's Crape Myrtle be planted in location of previously removed Foxtail Palm.
- Median #6: Remove Holly tree and replace with a Crape Myrtle.

Forest Hills Boulevard

- Median #12:
    - Recommend replacement of a missing tree and Ilex tree in decline with Queen Crape Mrytle's.
    - An auto accident damaged palm trees and shrubs. A replacement plant count will be provided after the area has been cleaned up.

Forest Hills Cart Crossing and Lake

- Xanadu plants are rejuvenating. Replacement will be evaluated at a future date.

Valley Stream Circle

- Recommend replacement of 5 Plumbago shrubs.
- Replace south purple Trumpet tree.

Pebble Beach Boulevard Golf Cart Crossing

- Remove 1 Foxtail palm and replace with one clear trunk palm.
- Prune dead wood on Plumbago shrubs and review for replacements.

Baltusrol Signs

- Replace forty-four missing or declining Bulbine plants (both sides).

Doral Circle

- Replace Tabebuia tree with a Golden Trumpet Tree.
- Median #23:
    - Recommend planting 2 White Gieger Trees at variegated ginger locations.
    - Recommend replacement of Golden Trumpet Tree with 'Verawood Tree.'

Comments

Mr. McGee:

- A proposal for replacement plants and shrubs, based on the Summary Report, should be submitted.
- Cul-de-sac landscaping is in good condition.

- Annuals look good. Recommend irrigation frequency be decreased by one-third. Increased quantities should be considered for future plantings.
- A & M Property Management will be notified of two new nursery sources for tree replacements.
- Fertilizer should be applied prior to mulch installation.
- Palm Trees will be replaced with the same species if disease is not present.

Mr. Schumacher:

- A Purchase order was issued to Tree Scaping of Naples to remove six trees, two stumps and prune the palm trees. Trimming will be requested prior to placement of mulch.
- Fertilizer has been ordered from Howard Fertilizer for delivery to A & M Property Maintenance. Application is anticipated in the next 2 weeks.

B. Landscape Maintenance Report – A & M Property Maintenance (A&M)

Mr. Yzaguirre reported:

- Routine maintenance is being performed on schedule.
- Some irrigation heads were replaced.
- Pebble Beach Boulevard, Median 17: A large number of Bougainvillea shrubs have died. Irrigation will be reviewed to confirm presence of system components. Installation of a dripline may be necessary.

VII. Project Manager's Report – Dan Schumacher

Mr. Schumacher reported:

A. Budget Report

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Lely Golf Estates MSTU Fund 1620 Budget for January 16, 2025, prepared January 9, 2025.

- Purchase Orders
  1. A & M Property Maintenance (A&M)
     - Incidentals are for landscape refurbishment and miscellaneous.
     - Grounds Maintenance is for regularly scheduled tasks and irrigation repairs.
  2. Collier County PUD – Water
  3. FPL – Electricity
  4. Howard Fertilizer & Chemical Co.- Fertilizer
  5. McGee & Associates – Landscape Architecture
  6. Premier Staffing – Transcription Services
  7. Sight N Sound, dba Naples Christmas Lighting – Holiday Decorations
  8. Simmonds Electrical – Electrical Maintenance and LED Fixtures
  9. SiteOne Landscape Supply – Irrigation Parts & Pumps
  10. Tree Scaping of Naples – Pruning and tree removal

- Budget Summary
  a. Line 1, Revenue – Of the $432,700 millage assessed, $349,804 has been collected, leaving an outstanding balance of $82,895.
  b. Line 2, Carry Forward – Unexpended Prior Year (2024) Funds $394,545.
  c. All Revenues – Of the $827,245 budgeted, $349,804 has been collected leaving an available balance of $477,441 (the sum of lines 1 and 2) minus Expenditures.

d. Line 21, Operating Expense – Of the $366,645 budgeted, $158,493 is committed to existing Purchase Orders and $59,846 is expended, leaving the remainder of $148,305 available within budget for additional operating expenses as needed.
e. Line 25, County Overhead – Of the $80,000 budgeted, $8699 has been transferred, and a balance of $71,300 remains for transfer (PTNE Staff & Overhead, Property Appraiser, & Tax Collector).
f. Line 27, Capital Projects – A balance of $230,600 remains for improvement projects.
g. Line 29, Capital Reserves - $150,000 is reserved for catastrophic events.
h. Line 30, All Expenses – Of the $827,245 budgeted, $158,493 is committed in existing Purchase Orders, $68,545 has been expended, leaving the remainder of $600,206 available for MSTU expenditures.

- General
  a. MSTU Tax Rate: 2.00 Mills (0.2%) is for beautification improvements and maintenance within the taxing district.
  b. The millage of 2.00 per $1,000 of Ad Valorem taxable value is reviewed annually in March or April.
  c. Tax millage collected and interest by the Lely Golf Estates Beautification MSTU may only be utilized by the MSTU and within the MSTU district boundary.

Mr. Schumacher noted:

- Uncommitted funds available within budget are eligible for transfer to other categories upon approval by the Committee.
- The invoice for Sight and Sound (Naples Christmas Tree Lighting) has been approved for payment.
- A contract has been awarded to a new vendor for Wastewater Pump Station Repairs and Services.
- Light pole replacement cost for Pebble Beach Circle and the Doral Sign renovation project will be debited from Capital Projects.
- The *Asset Management Plan* report to estimate useful life of MSTU assets and corresponding expenditure projections to fund maintenance will be updated during the 2026 planning process.
- The Ad Valorem taxable value increased 5.42% for fiscal year 2025 over 2024 generating additional revenue of $22,088.

B. Lighting Inspection Report and Light Pole Replacements

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Mr. Schumacher reported:

- The January 15, 2025, report indicated:
  - St. Andrews Blvd: eight luminaire light outages, six entry sign outages and 2 Flagpole lights out.
  - Doral Circle: two sign light outages.
- Simmonds Electrical has been contacted to conduct a diagnostic assessment and repair the issue.
- All lamp poles are fitted with Lumec-brand LED replacements.

Sign Light Fixtures

- A total of fourteen (14) LED light fixtures are required to replace existing sign lights, five (5) for each of the two monuments at St. Andrews Blvd and two (2) for each side of the two-sided sign at Doral Circle.
- Dabmar Lighting was contacted to verify specifications on sign lights. 5000K (natural white) color was recommended.
- A *Request for Quote* (RFQ) has been solicited from Simmonds Electrical to provide both equipment and installation for the sign lights.

C. Radar Speed Report

Mr. Schumacher reported:

- TrafficLogix is no longer preparing the Speed Data Reports.
- An entity familiar with Traffic Logix radar signs diagnostics has been identified and upon receipt of E-Verify documentation, the contractor will be a County vendor, and a Purchase Order issued.

Radar Speed Sign Report

Two (2) Traffic Logix SafePace 100 speed monitoring signs are installed on Saint Andrews Boulevard, eastbound by the Lely Presbyterian Church (*Radar 1*) and westbound at Pine Valley Circle (*Radar 2*).

- Radar 1 (110 St Andrews Blvd) did not function from July 2024 for several month.
- Radar 2 (255 Saint Andrews Blvd) will be serviced and activated.

Speed Bump Petition

Six months of traffic data was provided to Ms. McGarity for incorporation into a Speed Bump Petition being submitted to Traffic Operations requesting installation of speed bumps on St. Andrews Boulevard to deter speeding.

D. Applications to the Advisory Committee

Mr. Schumacher reported applications were received from Michael Mann and Dimitra Arneson for the two open advisory seats on the Lely Golf Estates Beautification MSTU Advisory Committee.

Michael Mann was not in attendance. The application will be considered by the Committee at the February 2025 meeting.

Recommendation for Dimitra Arneson

Vice Chair Dammert moved to recommend the Board of County Commissioners appoint Dimitra Arneson to the Lely Golf Estates Beautification MSTU Advisory Committee. Second by Ms. McGarity. Carried unanimously 3 - 0.

Dimitra Arneson's recommendation for appointment to the Lely Golf Estates Beautification MSTU Advisory Committee will be considered by the Board of County Commissioner's (BCC) in February 2025.

VIII. Ongoing Business

A. Traffic Signage – Transfer from Lely Civic Association to the MSTU

Mr. Schumacher reported:

Transfer of Decorative Traffic Signs from Lely Civic Association to the MSTU

- An Executive Summary, including the Civic Association's Financial Audit and Lely Civic Association covenants, was submitted to the County Attorney.
- The Executive Summary and request for approval to proceed with the transfer is on the Board of County Commissioners (BCC) Consent Agenda February 11, 2024.
- The transfer, at no cost to the MSTU, includes:
  - Sixty-two signs on decorative poles (37street and STOP signs and twenty-five speed limit signs).
  - Fourteen signs installed by the Traffic Operations Division (on standard poles with consideration given for installation on new decorative post).
- Upon completion of the transfer a Request for Quote (RFQ) for signs specified to withstand hurricane force winds will be distributed to three vendors.
- The contract will be awarded to the lowest qualified bidder.

B. Pebble Beach Light Pole #2

Mr. Schumacher reported:

A. Pebble Beach Light Pole

- Pole #20 has been replaced.
- An accident report was obtained from the Sheriff's Office and an insurance claim filed with the County Risk Management Division.

IX. New Business

Mr. Schumacher tabulated a working list of projects for 2025.

Rank	Vendor	Subject
1	Southeast Spreading	Mulch – Brown
2	Simmonds Electrical	Sign Lights Doral Entry
3	BCC	Signs – Transfer to MSTU
4	Project Manager	Signs – Procurement Purchase Order
5	Simmonds Electric	Sign Lights – St. Andrews Entry
6	TBD	Signs – Repair and Replace
7	Project Manager	Doral Sign – Repair/Renovate

Projects may be added, deleted, or delayed and priorities may shift.

X. Committee Member Comments

Ms. McGarity reported**:**

- Collier County's Public Renewal Utilities Project (PUR) for Lely has been postponed.
- Holiday decorations and lights for Forest Hills & Augusta Boulevard holiday should be upgraded in 2025.

XI. Public Comments

Doral Circle Holiday Lights

- Pat McCabe reported the Doral Circle holiday lights did not function on two or more occasions.
- **Mr. Schumacher** noted Simmonds Electrical replaced the photocell; the circuit will be checked.

Doral Circle Median

Mr. Schumacher reported:

- Approval of the flagpole installation site and landscaping in proximity to the bridge is required by the Road Maintenance Division.
- As noted at the January 2024 meeting, projects outside of Median #23, including consideration of adding a flagpole in the vicinity, will be evaluated by the Advisory Committee in FY-25.
- Ownership of the fence in the east Right of Way on Doral Circle will be determined and condition evaluated. He will provide an update at a future meeting.

XII. Adjournment

There being no further business to come before the Committee, the meeting was adjourned by Mr. Schumacher at 3:40 P.M.

LELY GOLF ESTATES BEAUTIFICATION MSTU ADVISORY COMMITTEE

_____

Chair

These Minutes were approved by the Committee on _____,2025 as presented ___ or as amended ___.

https://www.collierptne.com/mtsu/lely-golf-estates-beautification-advisory-committee/

NEXT MEETING: **FEBRUARY 20, 2025**
SOUTH REGIONAL LIBRARY
8065 LELY CULTURAL PARKWAY
NAPLES, FL 34113
239.252.7542

McGee & Associates
Landscape Architecture

Project: LELY GOLF ESTATES BEAUTIFICATION, M.S.T.U. **Landscape Architect Observation Report:** February 2025
Location: MSTU DISTRICIT ROADWAYS
Project Manager: Dan Schumacher, Collier County Public Services Division, Public Transportation & Neighborhood Enhancements Department
Consultant: McGee & Associates **Consultant's Representative:** Michael A. McGee, rla, isa
Contractor: A & M Property Management **Contractor's Representative:** Armando Yzaguirre
Report Date: FY24-25, 2/6/2025 **Observation Date:** 2/6/2025 **Report No.** 4 (FY25)

AC - Indicates major or repeating items recommended to be discussed by the Advisory Committee
S - Indicates items to be addressed by staff. **C** - Indicates items to be addressed by Contractor
Contractor is requested to address items as soon as possible and indicate in **RESPONSE/COMMENTS** column when and which items are corrected.
Note: Copy picture out of comment boxes a*nd then paste to additional sheet if picture is desired in larger size.*

LOCATION/WORK AREA	AC	S	C	R	OBSERVATION & RECOMMENDATIONS	ADDITIONAL COMMENTS
All locations		X	X		It is recommended that irrigation time be reduced on annual plantings. Reduction by 1/3 would be recommended.	
		X	X	7	Palm tree pruning is recommended in July to remove fronds and seed stalks. All Foxtail and Alexander palms need seed stalks removed and Sabal palms need seed stalks and lower fronds removed.	Strikethrough indicates items that have been addressed or are being addressed and will be removed from the next month's report. Yellow highlighting indicates items that need to be addressed as soon as possible for safety issues, potential plant damage or to reduce future maintenance issues.
St. Andrews Blvd. & US 41 **Inbound R/W South**		X	X	4	Two Alexander palms directly adjacent to the Royal palm hit by lightning have died. It appears the palms may have been also affected by the lightning strike, because no sign of disease is apparent. Replacement is recommended with (2) 10-foot clear trunk Alexander palms. Removal should be by excavation.	
		X	X	6	The 3rd large Royal palm from US 41 within the shopping center plantings that are under the control of the MSTU appears to have been hit by lightning. Removal and replacement is recommended. Replacement is recommended to have 8-foot of gray trunk.	
Outbound R/W North **Suncoast Credit Union side**		X	X		At the shopping center entry there is 33 l.f.+/- of perennial peanut between sidewalk and valley gutter that has torpedo grass in it. Recommended spraying areas for toal kil and then replanting with two staggered rows of (65) perennial peanut 'Golden Glory', 1 gal. 12" o.c.	
St. Andrews Blvd.						
Median #1		X	X	4	One Tabebuia tree has storm damage branches in top of tree that need to be addressed during next scheduled tree trimming.	
		X	X	8	On the inbound side there are two Foxtail palms that have Ganoderma disease, and it is recommended they be removed as soon as possible by excavation to remove as much as possible of the infected palm root systems and then backfill with clean native local topsoil. Palms have white flagging at the bases. Recommendation for any plant replacement if determined will come after palms are removed.	
Median #2		X	X	4	One Tabebuia tree has storm damage branches in top of tree that need to be addressed during next scheduled tree trimming.	
Median #3		X	X	3	East median end: Perennial peanut need additional fill in plants. (15) 1 gal. 'Golden Glory'	
Median #4		X	X	3	East median end: Perennial peanut need additional fill in plants. (20) 1 gal. 'Golden Glory'	
Median #5		X	X	3	At address 240: Plumbago shrub bed is very dry defoliated and defoliating plants.	

LELY GOLF ESTATES BEAUTIFICATION, M.S.T.U. **Report Date:** FY24-25 2/6/2025 **Observation Date:** 2/6/2025 **Report :** 4 (FY25)

LOCATION/WORK AREA	AC	S	C	R	OBSERVATION & RECOMMENDATIONS	ADDITIONAL COMMENTS
		X	X		At address 255: Foxtail palm is in decline due to Ganoderma disease. Removal by excavation recommended. Replant opening with (1) dwarf Bougainvillea 'Helen Johnson' 3 gal. Also at this location a previous Foxtail was removed just west of this one. It is recommended a Queen's Crape myrtle be planted. Lagstroemia speciosa 'Queen's Crape Myrtle', 10'–12' ht., 2.5" cal., 5' spr., 32" B&B or 45 Gal. Single leader trunk.	
Median #6		X	X		At address 240-243: 50% of Plumbago shrub bed is defoliated and/or dead. The cause of loss could be from previous disease, insects or water issues. Contractor should review and comment. Also provide count for replacements at 3 gal. size.	
		X	X	9	At address 243: Holly tree is dying and needs to be removed by excavation. Recommended replacement is with a Lagerstroemia fauriei 'Muskogee' – Crape myrtle 30 gal., 2" cal, 8'-10' ht., 5'-6' spr. multi-stem (4 min.)	
Median #7		X			No major issues observed.	
Median #8		X			No major issues observed.	
	X	X	X	10	East end: Approximately (16) dwarf Bougainvillea are defoliated and half of them have heavy stem decline. Recommended to consider renovation of this Bougainvillea planting area.	M&A 3/7/24: There are (8) missing or declined Bougainvillea 'Helen Johnson'. Replacement is recommended to occur in rainy season with 3 gal. size plants.
Median #8A		X	X		No major issues observed.	
Median #9		X	X		No major issues observed.	
Median #10		X	X	9	At address 379: (8) Bougainvillea 'Helen Johnson' are missing or declined and need replacements. Replacement is recommended to occur in rainy season with 3 gal. size plants.	M&A 5/1/24: At the request of the Committee a review was performed on St. Andrews Blvd. median #10 and the following was forwarded to the project manager. East half of median needs (22) dwarf Bougainvillea 3 gal. replacements; on the west half (15) dwarf Bougainvillea 3 gal. replacements; On the east end the existing perennial nut plantings contains large number of weeds that has resulted in, after the weeds are addressed, (35-40) 1 gal. size Golden Glory perennial peanut replacements will be needed to fill the bed. An alternate to peanut replacement would be to remove remaining peanut and install (68) 1 gal. Orange Bulbine on 18" centers.
Forest Hills Blvd						
Median #11		X	X		No major issues observed.	
Median #12		X	X	4	At address 420 & 426: There appears to be a missing tree. Replacement is recommended with a Lagerstroemia fauriei 'Muskogee' – Crape myrtle 30 gal., 2" cal, 8'-10' ht., 5'-6' spr. multi-stem (4 min.)	
		X	X	7	At address 450: Ilex tree is in complete decline dure to main trunk and branch rot due to poor compartmentalization from damaged branch removal. Recommend replacement with Queen's Crae mrytle. Lagstroemia speciosa 'Queen's Crape Myrtle', 10'–12' ht., 2.5" cal., 5' spr., 32" B&B or 45 Gal. Single leader trunk.	

McGee & Associates
Landscape Architecture

LELY GOLF ESTATES BEAUTIFICATION, M.S.T.U. **Report Date:** FY24-25 2/6/2025 **Observation Date:** 2/6/2025 **Report :** 4 (FY25)

LOCATION/WORK AREA	AC	S	C	R	OBSERVATION & RECOMMENDATIONS	ADDITIONAL COMMENTS
		X	X	13	At address 407: Auto accident has occurred with the following damage. (2) double Alexander palms destroyed, (9) dwarf Bougainvillea and (4) dwarf Fire bush. After cleanup another review will be performed to get final counts of shrub damage. (2) irrigation heads need review. (photo)	 
Forest Hills Cart Crossing & Lake		X	X	4	~~Xanadu plants on southeast corner of cart crossing have totally defoliated due to apparent fungus. Fungicide treat should occur as soon as possible and then plants will be reviewed next report.~~	~~M&A 9/5/24: Plants were treated, and minor regrowth is occurring. Will continue to monitor.~~ ~~M&A 10/3/24: Recommended removal and replant areas with Orange Bulbine, 1 gal. (35) plants.~~ ~~M&A 01/2/25: Xanadu are filling in, will monitor if replanting is not in process.~~
Valley Stream Cr. Median #13		X	X	3	5 Plumbago shrubs appear to have died. Replacement recommended with 3 gal. size.	
		X	X	4	Median needs mulch.	
	X	X		23	The south purple Trumpet tree rolled over during the storm. It was observed that the trunk had rotated out of the root ball and may have broken some main roots. Based upon what was observed while the tree was down it is recommended this tree be replaced because it may no ever re-root properly and become secure.	M&A 05/04/23: Handroanthus impetiginosis (Purple Trumpet tree) 11'-13' Ht., 3.5 Cal., 5'-6' Spr., 36" dia. B&B or 65 Gal. size container.
Pebble Beach Blvd.						
Median #14		X	X	3	South median end: Perennial peanut need additional fill in plants. (10) 1 gal. 'Golden Glory'	
Median #15		X	X		Address 16 thru 24: Median had minor flooding with mulch washed outside of median.	
Median #16		X	X		Address 24 thru 32: Median had minor flooding with mulch washed outside of median.	
Median #17		X	X		Address 108: Previous Holly tree replacement has died. Contractor needs to comment on reason if other than maintenance related issue and/or provide replacement.	
	X	X	X		The north and south ends of median have large areas of declined and/or dead dwarf Bougainvillea, which renovation is recommended at this time. A meeting discussion with the committee is recommended.	
		X	X		Address 132 thru 148: Median had minor flooding with mulch washed outside of median.	
		X	X	6	It is recommended that all the Bougainvillea in this median be fertilized in July with 8-0-10 fertilizer at a rate of 4 ounces per shrub applied directly around the main stem of the shrubs.	
Median #18		X	X		Address 151 thru 164: Median had minor flooding with mulch washed outside of median.	
		X	X	8	At address 156: (9) Bougainvillea 'Helen Johnson' are missing or declined and need replacements. Replacement is recommended to occur in rainy season with 3 gal. size plants.	
Median #19		X	X		No major issues observed.	

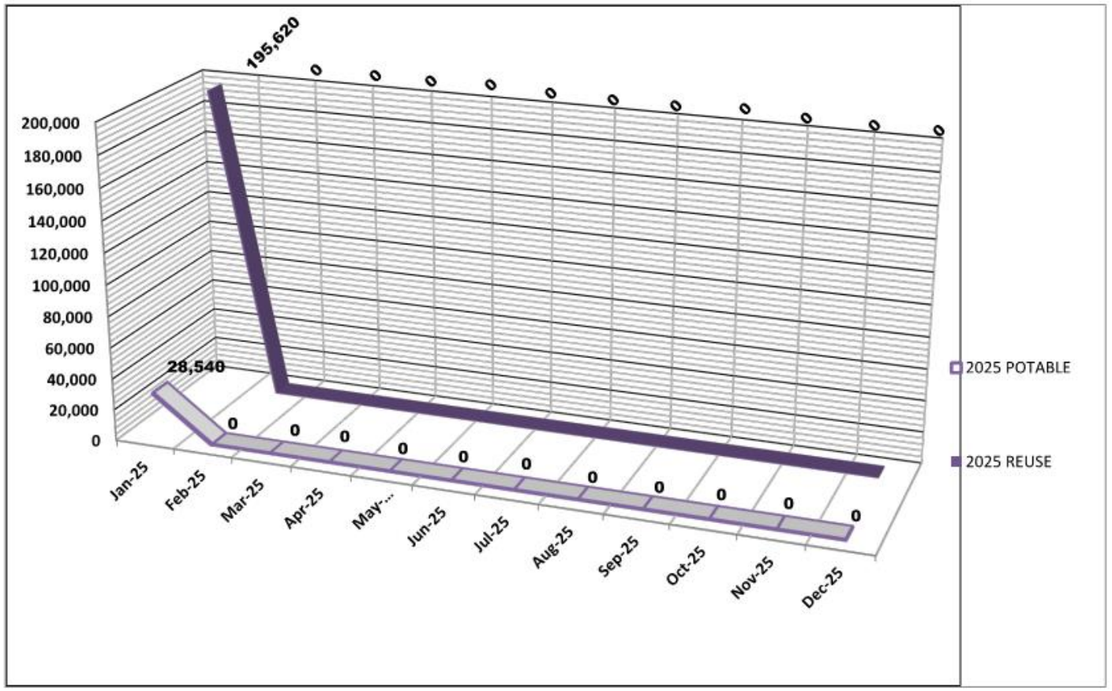
LELY GOLF ESTATES BEAUTIFICATION, M.S.T.U. **Report Date:** FY24-25 2/6/2025 **Observation Date:** 2/6/2025 **Report :** 4 (FY25)

LOCATION/WORK AREA	AC	S	C	R	OBSERVATION & RECOMMENDATIONS	ADDITIONAL COMMENTS
Pebble Beach Blvd. Golf Cart Crossing		X	X		Multiple (10+/-) Plumbago shrubs are defoliated in beds. Recommend pruning out dead wood and then reviewing for replacements. 3 gal. size	
		X		4	On the southwest corner one Foxtail palm has lost its entire bud and foliage. Remove and replace with 10' clear trunk Foxtail recommended.	
		X			The golf course side of the four beds was not mulched. Mulch is recommended to reduce weeds and thus reduce herbicide applications.	
Thorncrest Ln. cul-de-sac #20	X	X			Due to age and amount of decline it is recommended to renovate this cul-de-sac during this rainy season.	M&A 09/08/22: Renovation on hold, Remove dead plants. M&A 11/4/22: (15-20) dwarf Bougainvillea plants are dead, missing or declined and need to be replaced. Replace with Bougainvillea 'Helen Johnson' 3 gal. size
Briarcliff Ln. Cu-de-sac #21	X	X			Due to age and amount decline it is recommended to renovate this cul-de-sac during this rainy season.	M&A 09/08/22: Renovation on hold
Heather Grove Ln. Cul-de-sac #22		X			(8) Bougainvillea plants on the eastern side have been run over and need to be reviewed for removal. Any replacements would need to wait until rainy season has started.	
Baltusrol Signs		X	X	2	Each sign location has missing, declined or additional Bulbine plants.Total of (22) Bulbine 1 gal. (11) each sign, plants. Inbound sign could also use additional (3) Plumbago shrubs 3 gal. replacements.	
Doral Cr. East R/W		X			Mulch was not applied along the vacant lot side of the Podocarpus hedge, Liriope & Plumbago bed.	
		X	X	15	The first Tabebuia tree from Rattlesnake Hammock Rd. needs to be replaced due to previous hurricane damaged. Install Handoanthus chrysotrichus 'Golden Trumpet Tree', 11'–13' ht., 3.5" cal., 5'-6' spr., 36" B&B or 65 Gal. Single leader trunk.	M&A 9/5/24: Based upon supply of replacement trees the existing tree will reviewed with contractor to advise on corrective pruning.
West R/W & Rattlesnake Hammock Rd.		X			~~The northernmost Royal palm behind the Podocarpus shrubs is showing signs of decline in the newly emerging fronds. Ganoderma disease fungal conchs were not observed. From a grade level observation, the issue could be related to Potassium and/or Manganese deficiencies. Recommendations: 1. Apply a soil application of manganese sulfate at 10 pounds per tree spread around the base of the tree in a six-foot radius. 2. Apply 8-0-10 fertilizer containing potassium sulfate, potassium chloride (muriate of potash) and potassium nitrate at a rate of 4 pounds per tree spread around the base of the tree in a six-foot radius. 3. Perform an aerial observation to review the declined fronds to better determine the decline cause.~~	~~M&A 9/5/24: Continuing to monitor palm as regrowth appears to be improved.~~
		X	X		Mulch was not applied along the house side of the Podocarpus. There is also dumped concrete debris that should be removed so plant scan be mulched properly.	
Median #23		X	X	2	Treat multiple ant beds along the back of curbing.	
		X	X	3	One Alyssum annual has died.	M&A 1-2-25: Roadway paving operations around median may have damaged more annuals. If replanting an additional (5) Salvia could be added on inbound side. M&A 2-6-25: (8) Alyssum are dead or heavily declined with yellow foliage. Recommended removal and replacement. Reduce watering if not already adjusted.
				3	Two Ixora 3 gal. shrubs have declined and need to be replaced. Based upon other plant growth if existing Ixora could be relocated that would be acceptable.	
		X	X	3	It is recommended (2) White Gieger trees be planted at variegated ginger locations to	

LELY GOLF ESTATES BEAUTIFICATION, M.S.T.U. **Report Date:** FY24-25 2/6/2025 **Observation Date:** 2/6/2025 **Report :** 4 (FY25)

LOCATION/WORK AREA	AC	S	C	R	OBSERVATION & RECOMMENDATIONS	ADDITIONAL COMMENTS
					create shade for ginger. Cordia boissieri White Geiger, ≥ 7' ht., 3" cal., > 4' spr., 32" B&B or 45 Gal. Single leader trunk.	
		X	X	5	Recommended replacement Tree for Golden Trumpet Tree in median #23, Bulnesia arborea 'Verawood Tree', 11'–13' ht., 3.5" cal., 5'-6' spr., 36" B&B or 65 Gal. Single leader trunk.	
		X	X			
Median #24 Treasure Point Cul-de-sac		X	X			
Warren St. Pumping Station		X	X		No major issues observed. See water use schedule.	
Valley Stream Cr. Irrigation					No major issues observed. See water use schedule.	
Fertilization		X	X		See FY23-24 recommended schedule.	

Lely Golf Estates Beautification MSTU Reuse Mixing Chamber Annual Water Use thru 1/25



Notes: 2023 Total Water Use: Reuse 1,846,930 gallons, Potable 188,030 gallons
2024 Total Water Use: reuse 1,378,290 gallons, Potable 24,720.10 gallons

2/6/2025

Warren Street Mixing Chamber Water Use Data: 1/2025

DATE	REUSE PSI	POTABLE WATER METER (X 100)	POTABLE WATER USE GALLONS	REUSE WATER METER READING (X x 100)	REUSE WATER USE GALLONS	TOTAL WATER APPLIED
12/31/2024	84	85,500.40		74,452.60		-
1/9/2025	84	85,500.40	-	75,129.40	67,680.00	67,680.00
2/2/2025	84	85,500.40	-	76,408.80	127,940.00	127,940.00
		TOTALS:	**0.00**		**195,620.00**	**195,620.00**
PERCENTAGE OF TOTAL VOLUME USED			**0.0%**		**100.0%**	

Valley Stream Circle Water Use Data: 1/2025

DATE	POTABLE WATER METER READING (X 1)	POTABLE WATER USE GALLONS
12/31/2024	694700.08	
1/9/2025	701000.03	6300
2/2/2025	723240.04	22240
		28,540

LELY GOLF ESTATES M.S.T.U.
Fund 1620
February 20, 2025

	FY-25	Vendor	Item	PO#	Budget	Commitments	Expenditures	Available
1	MILLAGE COLLECTED & INTEREST		MSTU Revenues		$ (432,700.00)	$ -	$ (366,258.46)	$ (66,441.54)
2	CARRY FORWARD		Unexpended Prior Year Funds		$ (394,545.72)	$ -	$ -	$ (394,545.72)
	ALL REVENUES				**$ (827,245.72)**	**$ -**	**$ (366,258.46)**	**$ (460,987.26)**
		McGee & Associates	Landscape Architect (FY-25)	4500234203		$ 18,600.85	$ 2,774.15	
		McGee & Associates	Landscape Architect (FY-24)	4500228493			$ 886.75	
3	ENG. FEES & OTHERS				**$ 32,595.20**	**$ 18,600.85**	**$ 3,660.90**	**$ 10,333.45**
4	INDIRECT COST REIMBURSE	Collier County	Indirect Cost	Direct Pay	$ 6,900.00	$ 3,450.00	$ 3,450.00	$ -
		A&M Property Maint	Landscape Incidentals	4500234775	$ 45,000.00	$ 32,091.49	$ 12,908.51	
5	LANDSCAPE INCIDENTALS (634990)				**$ 40,000.00**	**$ 32,091.49**	**$ 12,908.51**	**$ (5,000.00)**
					$ 80,200.00	$ -	$ -	$ -
		A&M Property Maint	Grounds Maintenance	4500234775	$ 60,000.00	$ 31,515.20	$ 28,484.80	$ -
6	OTHER CONTRACTUAL (634999)				**$ 140,200.00**	**$ 31,515.20**	**$ 28,484.80**	**$ 80,200.00**
		Tree Scaping	Tree & Palm - Removal	4500235300	$ 5,000.00	$ 5,000.00	$ -	
		Tree Scaping	Tree & Palm - Pruning	4500234131	$ 15,000.00	$ 15,000.00	$ -	
		Naples Electric Motor Works	Pump Station Services	4500234618	$ 3,000.00	$ 3,000.00	$ -	
7	OTHER CONTRACTUAL (639990)				$ 25,000.00	$ 23,000.00	$ -	$ 2,000.00
8	ELECTRICITY	FPL	Electricity	4700005159	$ 5,200.00	$ 3,930.40	$ 1,269.60	$ -
9	WATER AND SEWER	Collier County Public Utilities	Water - Irrigation	4700005160	$ 10,000.00	$ 7,421.79	$ 2,578.21	$ -
10	INSURANCE GENERAL	Collier County	Insurance	Direct Pay	$ 700.00	$ 350.00	$ 350.00	$ -
11	SPRINKLER SYSTEM	SiteOne	Irrigation Parts & Pumps	4500234776	$ 5,000.00	$ 2,987.23	$ 512.77	$ 1,500.00
12	MULCH				$ 10,000.00		$ -	$ 10,000.00
		Simmonds Electrical (FY24)	Electrical Services	4500227629		$ 8,885.69	$ 18,164.83	
		Simmonds Electrical (FY25)	Electrical Services	4500234130	$ 5,000.00	$ 4,677.91	$ 322.09	
13	LIGHTING MAINTENANCE				**$ 57,050.52**	**$ 13,563.60**	**$ 18,486.92**	**$ 25,000.00**
14	LICENSE & PERMITS				$ 2,000.00	$ -	$ -	$ 2,000.00
		Naples Christmas Lighting	Holiday Decorations	4500235068	$ 4,600.00	$ -	$ 4,600.00	
		Premier Staffing	Transcription	4500234230	$ 2,977.90	$ 2,517.55	$ 460.35	
15	OTHER MISCELLANEOUS (649990)				**$ 13,000.00**	**$ 2,517.55**	**$ 5,060.35**	**$ 5,422.10**
16	OFFICE SUPPLIES				$ 100.00	$ -	$ -	$ 100.00
17	COPYING CHARGES	J.M. Todd	Copier CPC	4500234730	$ 200.00	$ 81.73	$ 68.27	$ 50.00
18	FERT HERB CHEM	HOWARD FERTILIZER & CHEMICAL	FERTILIZER & CHEMICALS	4500234348	$ 3,500.00	$ 291.20	$ 1,708.80	$ 1,500.00
	COMPUTER SOFTWARE	TRAFFIC LOGIX CORP	Digital Solar Radar	4500237098	$ -	$ 1,700.00	$ -	$ (1,700.00)
19	OTHER OPERATING				$ 200.00	$ -	$ -	$ 200.00
20	TRAFFIC SIGNS				$ 15,000.00	$ -	$ -	$ 15,000.00
21	**OPERATING EXPENSES**				**$ 366,645.72**	**$ 141,501.04**	**$ 78,539.13**	**$ 146,605.55**
22	PTNE STAFF & DIVISION OVERHEAD				$ 66,700.00	$ -	$ -	$ 66,700.00
23	PROPERTY APPRAISER				$ 3,400.00	$ -	$ 1,580.76	$ 1,819.24
24	TAX COLLECTOR				$ 9,900.00	$ -	$ 8,211.86	$ 1,688.14
25	**COUNTY OVERHEAD**				**$ 80,000.00**	**$ -**	**$ 9,792.62**	**$ 70,207.38**
26	IMPROVEMENTS GENERAL				$ 230,600.00	$ -	$ -	$ 230,600.00
27	**CAPITAL PROJECTS**				**$ 230,600.00**	**$ -**	**$ -**	**$ 230,600.00**
28	RESERVES FOR INSURANCE				$ 150,000.00	$ -	$ -	$ 150,000.00
29	**CAPITAL RESERVES**				**$ 150,000.00**	**$ -**	**$ -**	**$ 150,000.00**
30	**ALL EXPENSES**				**$ 827,245.72**	**$ 141,501.04**	**$ 88,331.75**	**$ 597,412.93**
31	**FY-25 BUDGET GRAND TOTAL**		= ALL REVENUES - ALL EXPENSES		**$ -**	**$ 141,501.04**	**$ (277,926.71)**	**$ 136,425.67**

LELY GOLF ESTATES M.S.T.U.
Fund 1620
February 20, 2025

92,697,303	FY 13 Final Taxable Value	-3.3%	
95,718,423	FY 14 Final Taxable Value	3.3%	
99,596,489	FY 15 Final Taxable Value	4.1%	
106,888,467	FY 16 Final Taxable Value	7.3%	
116,823,687	FY 17 Final Taxable Value	9.3%	
127,802,080	FY 18 Final Taxable Value	9.4%	
135,136,761	FY 19 Final Taxable Value	5.7%	
142,494,654	FY 20 Final Taxable Value	5.4%	
152,194,183	FY 21 Final Taxable Value	6.8%	
156,289,928	FY 22 Final Taxable Value	2.7%	
180,384,272	FY 23 Final Taxable Value	15.4%	+6.3% Average
203,796,660	FY 24 Final Taxable Value	13.0%	
$214,844,295	**FY 25 Gross Taxable Value**		
5.42%	**Adjustment FY 24 to FY 25**		
	FY 25 Gross MSTU Revenue	FY 24	
Millage	**2.0000**	2.0000	**2.0 mill cap**
Tax Dollars	**$429,688.59**	$407,600	**$68,920** **Increase**

Total Available Balance	**$**	**597,412.93**
Plus Commited And Not Spent	**$**	**141,501.04**
Estimated Cash	**$**	**738,913.97**

Prepared 02/11/25 ZS

LELY MSTU LIGHTING INSPECTION			Inspection Date:	2/6/2025		
ST. ANDREWS ENTRANCE - FROM US-41						
TUBE		**A**	**B**	**C**	**D**	**E**
Sign - Enter	**1**					
Sign - Exit	**2**	O				
SPOT		O	**A**	**B**	**Notes**	
Flagpole - US	**1**	O				
Flagpole - FL	**2**	O			▪ Current outages are sequenced in **RED**.	
Flagpole - BCC	**3**					
LUMINAIRE		O	**A**	**B**		
Single	**1**					
Single	**2**				▪ Outages repaired in the past month are sequenced in **GRAY**.	
Single	**3**	O				
Single	**4**	O				
Single	**5**	O				
Single	**6**					
Single	**7**					
Single	**8**	O				
Single	**9**	O				
Single	**10**					
Single	**11**					
PEBBLE BEACH BLVD						
LUMINAIRE		O	**A**	**B**		
Double	**1**					
Double	**2**					
Double	**3**					
Double	**4**					
Double	**5**					
Double	**6**					
Double	**7**					
Double	**8**					
Double	**9**					
Double	**10**					
Double	**11**					
Double	**12**					
Double	**13**					
Double	**14**					
Double	**15**					
Double	**16**					
Double	**17**					
Double	**18**					
Double	**19**					
Double	**20**					
Double	**21**					
Single	**22**					
Single	**23**					

LELY MSTU LIGHTING INSPECTION			***2/6/2025***		
FOREST HILLS @ AUGUSTA					
'*LELY*' SIGN		O	**A**	**B**	1909
Solar Light	--				**Notes**
DORAL CIRCLE					
TUBES		O	**A**	**B**	
Sign - Enter	**1**	O			
Sign - Exit	**2**	O			
LUMINAIRE		O	**A**	**B**	
Double	**1**				
Double	**2**				
Single	**3**				
Single	**4**				
Single	**5**				
Single	**6**				

Count by Speed Range Report

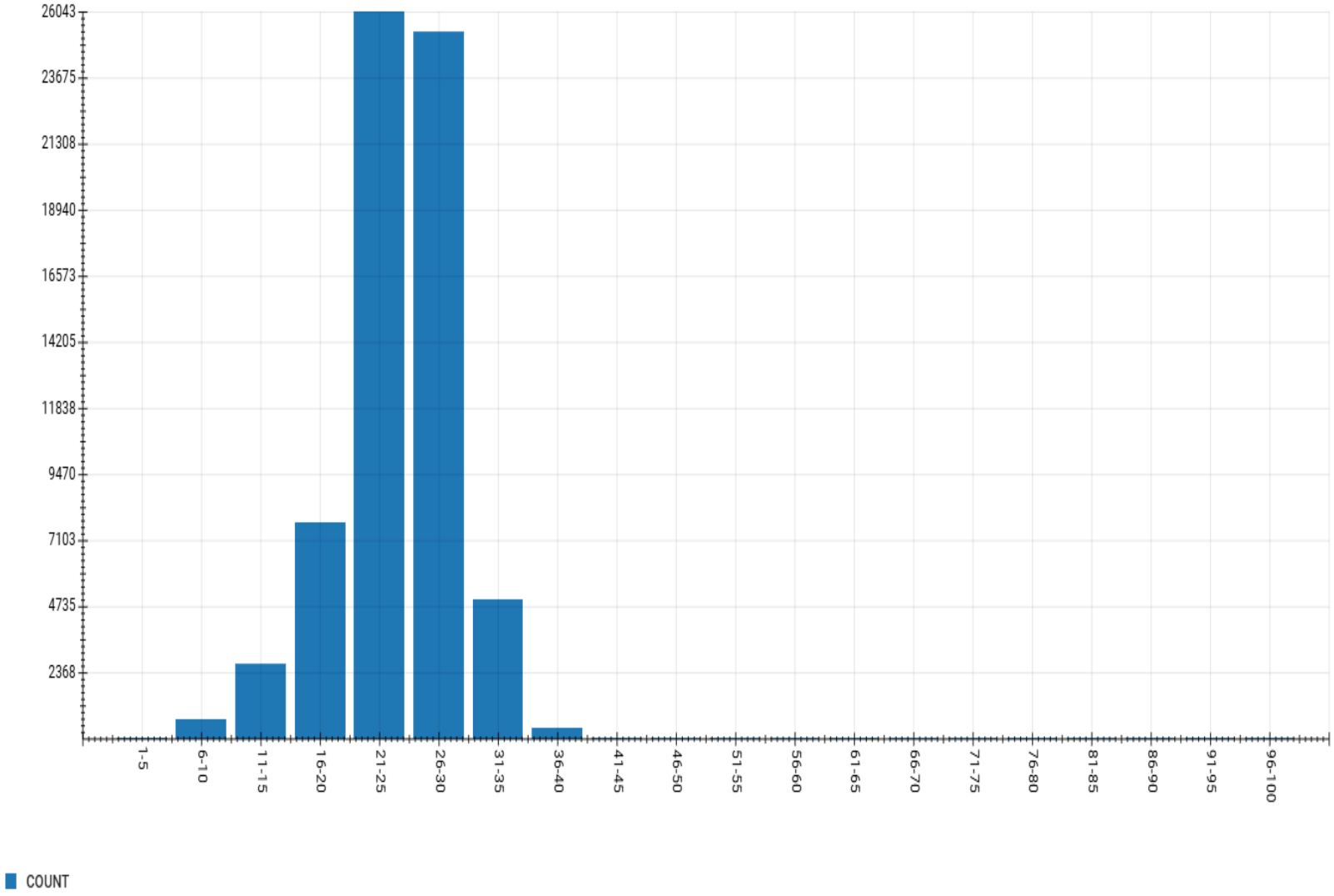
Location: Radar 1

Address: 110 Saint Andrews Blvd

Report period: 2025-01-14 to 2025-02-14

Count By Speed Range

Speed (mph)	Count
1-5	26
6-10	694
11-15	2661
16-20	7759
21-25	26043
26-30	25304
31-35	5000
36-40	379
41-45	36
46-50	5
51-55	1
56-60	0
61-65	0
66-70	0
71-75	0
76-80	0
81-85	0
86-90	0
91-95	0
96-100	0
Total	67908



Generated on February 14, 2025 at 1:44 PM

SafePace Cloud powered by Web Director®

Count by Speed Range Report

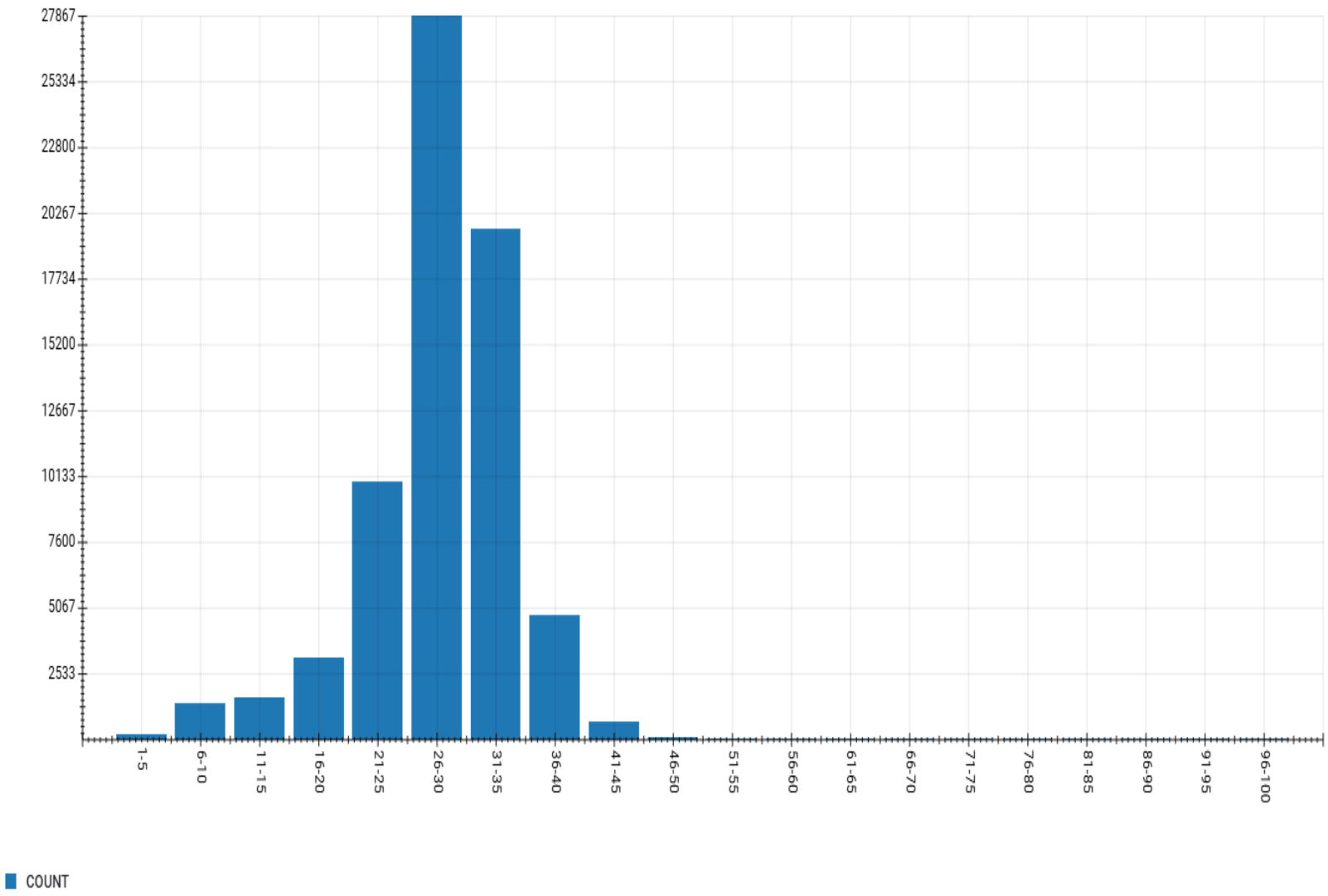
Location: Radar 2

Address: 255 Saint Andrews Blvd

Report period: 2025-01-14 to 2025-02-14

Count By Speed Range

Speed (mph)	Count
1-5	205
6-10	1388
11-15	1625
16-20	3159
21-25	9903
26-30	27867
31-35	19633
36-40	4781
41-45	661
46-50	96
51-55	24
56-60	5
61-65	0
66-70	1
71-75	0
76-80	0
81-85	0
86-90	0
91-95	0
96-100	0
Total	69348



Generated on February 14, 2025 at 1:46 PM

SafePace Cloud powered by Web Director®

Advisory Board Application Form

Collier County Government
3299 Tamiami Trail East, Suite 800
Naples, FL 34112
(239) 252-8400

Application was received on: 12/19/2024 04:55:20 PM

Name: Michael E. Mann

Email Address:

Home Address: Pinehurst Cir

City/Zip Code: Naples, 34113

Primary Phone:

Secondary Phone:

Board or Committee: Lely Golf Estates Beautification MSTU Advisory Committee

Category (if Applicable):

Place of Employment? Retired 2012 from full time work. Part time Marco Island Marina Dockmaster's Office

Do you or your employer do business with the County? No

How many years have you lived in Collier County? 10-15

Home many months out of the year do you reside in Collier County? I am a year-round resident

Have you been convicted or found guilty of a criminal offense (any level felony or first degree misdemeanor only)? No

Would you and/or any organizations with which you are affiliated benefit from decisions or recommendations made by this advisory board? No

Are you a registered voter in Collier County? Yes

Do you currently hold an elected office? No

Do you now serve, or have you ever served on a Collier County board or committee? No

Please list your community activities and positions held: Lely Civic Assn. dba Lely Golf Estates HOA-Architectural Review Committee. 5 years Assisted members of the HOA Board with numerous projects throughout the community since 2014

Education: 2 years college. No degree

Experience / Background: 2 years college. No degree

GOLF ESTATES BEAUTIFICATION MSTU

ADVISORY COMMITTEE

8300 Radio Road
Naples, FL 34104

Minutes

January 16, 2025

I. Call to Order

The meeting was called to order at 2:08 P.M. Roll call was taken, and a quorum of three was established.

II. Attendance

Committee Members: Open Seat, Chair; Kathleen Dammert, Vice Chair; Linda Jorgensen, Lisa McGarity, Open Seat
County Staff: Brian Wells, Director, PTNE Division (Excused); Dan Schumacher, Project Manager, PTNE Division; Rosio Garcia, Operations Analyst, PTNE Division
Contractors: Mike McGee, Landscape Architect, McGee & Associates; Armando Yzaguirre, A&M Property Maintenance; Wendy Warren, Premier Staffing
Others: Dimitra Arneson, Resident; Pat McCabe, Resident

III. Approval of Agenda

Ms. McGarity moved to approve the Agenda of the Lely Golf Estates Beautification MSTU Advisory Committee as presented. Second by Vice Chair Dammert. Carried unanimously 3 - 0.

IV. Approval of Minutes – September 19, 2024, and October 17, 2024

Vice Chair Dammert moved to approve the Lely Golf Estates Beautification MSTU Advisory Committee meeting minutes of September 19, 2024, and October 17, 2024, as presented. Second by Ms. Jorgensen. Carried unanimously 3 - 0.

V. Chair's Report

Summary reports will be provided at future meetings.

VI. Contractor Reports

A. Landscape Architect's Report – McGee & Associates (M&A)

Mr. McGee summarized the January 2, 2025, observation report.
(The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).

Maintenance Areas

1. St. Andrews Blvd.
2. Forest Hills Blvd. & Cart Crossing
3. Valley Stream Circle
4. Pebble Beach Blvd. & Cart Crossing
5. Thorncrest, Briarcliff, and Heather Grove Lanes (cul-de-sacs)
6. Baltusrol Drive & Cart Crossing
7. Doral Circle
8. Rattlesnake Hammock Rd.

Comments

Mr. McGee reported:

All locations

- Palm tree pruning is recommended to remove fronds and seed stalks.
- Recommend replacement of Bougainvilleas and shrubs which suffered wind damage from Hurricane Milton.
- Additional Perennial Peanut plants are recommended in multiple medians.

St. Andrews Blvd. & US 41

- Recommend removal and replacement of two Alexander Palms damaged by lightning with 10- foot clear trunk palms.
- The third large Royal Palm within the shopping center plantings appears to have been struck by lightning. Recommend replacement with an 8-foot gray trunk palm.

St. Andrews Blvd.

- Median #1: Remove the two Foxtail Palms with Ganoderma disease. Plant replacement will be recommended post removal.
- Median #5:
    - Removal of Foxtail Palm with Ganoderma disease is recommended. Replant with 'Helen Johnson' dwarf Bougainvillea.
    - Recommend 1 Queen's Crape Myrtle be planted in location of previously removed Foxtail Palm.
- Median #6: Remove Holly tree and replace with a Crape Myrtle.

Forest Hills Boulevard

- Median #12:
    - Recommend replacement of a missing tree and Ilex tree in decline with Queen Crape Mrytle's.
    - An auto accident damaged palm trees and shrubs. A replacement plant count will be provided after the area has been cleaned up.

Forest Hills Cart Crossing and Lake

- Xanadu plants are rejuvenating. Replacement will be evaluated at a future date.

Valley Stream Circle

- Recommend replacement of 5 Plumbago shrubs.
- Replace south purple Trumpet tree.

Pebble Beach Boulevard Golf Cart Crossing

- Remove 1 Foxtail palm and replace with one clear trunk palm.
- Prune dead wood on Plumbago shrubs and review for replacements.

Baltusrol Signs

- Replace forty-four missing or declining Bulbine plants (both sides).

Doral Circle

- Replace Tabebuia tree with a Golden Trumpet Tree.
- Median #23:
    - Recommend planting 2 White Gieger Trees at variegated ginger locations.
    - Recommend replacement of Golden Trumpet Tree with 'Verawood Tree.'

Comments

Mr. McGee:

- A proposal for replacement plants and shrubs, based on the Summary Report, should be submitted.
- Cul-de-sac landscaping is in good condition.

- Annuals look good. Recommend irrigation frequency be decreased by one-third. Increased quantities should be considered for future plantings.
- A & M Property Management will be notified of two new nursery sources for tree replacements.
- Fertilizer should be applied prior to mulch installation.
- Palm Trees will be replaced with the same species if disease is not present.

Mr. Schumacher:

- A Purchase order was issued to Tree Scaping of Naples to remove six trees, two stumps and prune the palm trees. Trimming will be requested prior to placement of mulch.
- Fertilizer has been ordered from Howard Fertilizer for delivery to A & M Property Maintenance. Application is anticipated in the next 2 weeks.

B. Landscape Maintenance Report – A & M Property Maintenance (A&M)

Mr. Yzaguirre reported:

- Routine maintenance is being performed on schedule.
- Some irrigation heads were replaced.
- Pebble Beach Boulevard, Median 17: A large number of Bougainvillea shrubs have died. Irrigation will be reviewed to confirm presence of system components. Installation of a dripline may be necessary.

VII. Project Manager's Report – Dan Schumacher

Mr. Schumacher reported:

A. Budget Report

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Lely Golf Estates MSTU Fund 1620 Budget for January 16, 2025, prepared January 9, 2025.

- Purchase Orders
  1. A & M Property Maintenance (A&M)
     - Incidentals are for landscape refurbishment and miscellaneous.
     - Grounds Maintenance is for regularly scheduled tasks and irrigation repairs.
  2. Collier County PUD – Water
  3. FPL – Electricity
  4. Howard Fertilizer & Chemical Co.- Fertilizer
  5. McGee & Associates – Landscape Architecture
  6. Premier Staffing – Transcription Services
  7. Sight N Sound, dba Naples Christmas Lighting – Holiday Decorations
  8. Simmonds Electrical – Electrical Maintenance and LED Fixtures
  9. SiteOne Landscape Supply – Irrigation Parts & Pumps
  10. Tree Scaping of Naples – Pruning and tree removal

- Budget Summary
  a. Line 1, Revenue – Of the $432,700 millage assessed, $349,804 has been collected, leaving an outstanding balance of $82,895.
  b. Line 2, Carry Forward – Unexpended Prior Year (2024) Funds $394,545.
  c. All Revenues – Of the $827,245 budgeted, $349,804 has been collected leaving an available balance of $477,441 (the sum of lines 1 and 2) minus Expenditures.

d. Line 21, Operating Expense – Of the $366,645 budgeted, $158,493 is committed to existing Purchase Orders and $59,846 is expended, leaving the remainder of $148,305 available within budget for additional operating expenses as needed.
e. Line 25, County Overhead – Of the $80,000 budgeted, $8699 has been transferred, and a balance of $71,300 remains for transfer (PTNE Staff & Overhead, Property Appraiser, & Tax Collector).
f. Line 27, Capital Projects – A balance of $230,600 remains for improvement projects.
g. Line 29, Capital Reserves - $150,000 is reserved for catastrophic events.
h. Line 30, All Expenses – Of the $827,245 budgeted, $158,493 is committed in existing Purchase Orders, $68,545 has been expended, leaving the remainder of $600,206 available for MSTU expenditures.

- General
  a. MSTU Tax Rate: 2.00 Mills (0.2%) is for beautification improvements and maintenance within the taxing district.
  b. The millage of 2.00 per $1,000 of Ad Valorem taxable value is reviewed annually in March or April.
  c. Tax millage collected and interest by the Lely Golf Estates Beautification MSTU may only be utilized by the MSTU and within the MSTU district boundary.

Mr. Schumacher noted:

- Uncommitted funds available within budget are eligible for transfer to other categories upon approval by the Committee.
- The invoice for Sight and Sound (Naples Christmas Tree Lighting) has been approved for payment.
- A contract has been awarded to a new vendor for Wastewater Pump Station Repairs and Services.
- Light pole replacement cost for Pebble Beach Circle and the Doral Sign renovation project will be debited from Capital Projects.
- The *Asset Management Plan* report to estimate useful life of MSTU assets and corresponding expenditure projections to fund maintenance will be updated during the 2026 planning process.
- The Ad Valorem taxable value increased 5.42% for fiscal year 2025 over 2024 generating additional revenue of $22,088.

B. Lighting Inspection Report and Light Pole Replacements

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Mr. Schumacher reported:

- The January 15, 2025, report indicated:
  - St. Andrews Blvd: eight luminaire light outages, six entry sign outages and 2 Flagpole lights out.
  - Doral Circle: two sign light outages.
- Simmonds Electrical has been contacted to conduct a diagnostic assessment and repair the issue.
- All lamp poles are fitted with Lumec-brand LED replacements.

Sign Light Fixtures

- A total of fourteen (14) LED light fixtures are required to replace existing sign lights, five (5) for each of the two monuments at St. Andrews Blvd and two (2) for each side of the two-sided sign at Doral Circle.
- Dabmar Lighting was contacted to verify specifications on sign lights. 5000K (natural white) color was recommended.
- A *Request for Quote* (RFQ) has been solicited from Simmonds Electrical to provide both equipment and installation for the sign lights.

C. Radar Speed Report

Mr. Schumacher reported:

- TrafficLogix is no longer preparing the Speed Data Reports.
- An entity familiar with Traffic Logix radar signs diagnostics has been identified and upon receipt of E-Verify documentation, the contractor will be a County vendor, and a Purchase Order issued.

Radar Speed Sign Report

Two (2) Traffic Logix SafePace 100 speed monitoring signs are installed on Saint Andrews Boulevard, eastbound by the Lely Presbyterian Church (*Radar 1*) and westbound at Pine Valley Circle (*Radar 2*).

- Radar 1 (110 St Andrews Blvd) did not function from July 2024 for several month.
- Radar 2 (255 Saint Andrews Blvd) will be serviced and activated.

Speed Bump Petition

Six months of traffic data was provided to Ms. McGarity for incorporation into a Speed Bump Petition being submitted to Traffic Operations requesting installation of speed bumps on St. Andrews Boulevard to deter speeding.

D. Applications to the Advisory Committee

Mr. Schumacher reported applications were received from Michael Mann and Dimitra Arneson for the two open advisory seats on the Lely Golf Estates Beautification MSTU Advisory Committee.

Michael Mann was not in attendance. The application will be considered by the Committee at the February 2025 meeting.

Recommendation for Dimitra Arneson

Vice Chair Dammert moved to recommend the Board of County Commissioners appoint Dimitra Arneson to the Lely Golf Estates Beautification MSTU Advisory Committee. Second by Ms. McGarity. Carried unanimously 3 - 0.

Dimitra Arneson's recommendation for appointment to the Lely Golf Estates Beautification MSTU Advisory Committee will be considered by the Board of County Commissioner's (BCC) in February 2025.

VIII. Ongoing Business

A. Traffic Signage – Transfer from Lely Civic Association to the MSTU

Mr. Schumacher reported:

Transfer of Decorative Traffic Signs from Lely Civic Association to the MSTU

- An Executive Summary, including the Civic Association's Financial Audit and Lely Civic Association covenants, was submitted to the County Attorney.
- The Executive Summary and request for approval to proceed with the transfer is on the Board of County Commissioners (BCC) Consent Agenda February 11, 2024.
- The transfer, at no cost to the MSTU, includes:
  - Sixty-two signs on decorative poles (37street and STOP signs and twenty-five speed limit signs).
  - Fourteen signs installed by the Traffic Operations Division (on standard poles with consideration given for installation on new decorative post).
- Upon completion of the transfer a Request for Quote (RFQ) for signs specified to withstand hurricane force winds will be distributed to three vendors.
- The contract will be awarded to the lowest qualified bidder.

B. Pebble Beach Light Pole #2

Mr. Schumacher reported:

A. Pebble Beach Light Pole

- Pole #20 has been replaced.
- An accident report was obtained from the Sheriff's Office and an insurance claim filed with the County Risk Management Division.

IX. New Business

Mr. Schumacher tabulated a working list of projects for 2025.

Rank	Vendor	Subject
1	Southeast Spreading	Mulch – Brown
2	Simmonds Electrical	Sign Lights Doral Entry
3	BCC	Signs – Transfer to MSTU
4	Project Manager	Signs – Procurement Purchase Order
5	Simmonds Electric	Sign Lights – St. Andrews Entry
6	TBD	Signs – Repair and Replace
7	Project Manager	Doral Sign – Repair/Renovate

Projects may be added, deleted, or delayed and priorities may shift.

X. Committee Member Comments

Ms. McGarity reported**:**

- Collier County's Public Renewal Utilities Project (PUR) for Lely has been postponed.
- Holiday decorations and lights for Forest Hills & Augusta Boulevard holiday should be upgraded in 2025.

XI. Public Comments

Doral Circle Holiday Lights

- Pat McCabe reported the Doral Circle holiday lights did not function on two or more occasions.
- **Mr. Schumacher** noted Simmonds Electrical replaced the photocell; the circuit will be checked.

Doral Circle Median

Mr. Schumacher reported:

- Approval of the flagpole installation site and landscaping in proximity to the bridge is required by the Road Maintenance Division.
- As noted at the January 2024 meeting, projects outside of Median #23, including consideration of adding a flagpole in the vicinity, will be evaluated by the Advisory Committee in FY-25.
- Ownership of the fence in the east Right of Way on Doral Circle will be determined and condition evaluated. He will provide an update at a future meeting.

XII. Adjournment

There being no further business to come before the Committee, the meeting was adjourned by Mr. Schumacher at 3:40 P.M.

LELY GOLF ESTATES BEAUTIFICATION MSTU ADVISORY COMMITTEE

Kathleen Dammert

Chair

These Minutes were approved by the Committee on Feb. 20, ,2025 as presented ✓ or as amended ___.

https://www.collierptne.com/mtsu/lely-golf-estates-beautification-advisory-committee/

NEXT MEETING: **FEBRUARY 20, 2025**
SOUTH REGIONAL LIBRARY
8065 LELY CULTURAL PARKWAY
NAPLES, FL 34113
239.252.7542

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

March 12, 2025

FOR IMMEDIATE RELEASE

Notice of Hybrid Remote Public Meeting
Lely Beautification MSTU Advisory Committee
Collier County, Florida

March 20, 2025
2:00 p.m.

Notice is hereby given that the **Lely Beautification Municipal Service Taxing Unit (MSTU) Advisory Committee** will meet on **Thursday, March 20, 2025,** at **2:00 p.m.** This will be a Hybrid Remote meeting and held in the Conference Room at the South Regional Library, 8065 Lely Cultural Pkwy, Naples, Florida. The public may participate either remotely or in person.

Individuals who would like to participate remotely should contact Rosio Garcia at Rosio.Garcia@colliercountyfl.gov by noon on March 20.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

The agenda will be available on the Collier County Government website at https://www.collierptne.com/mtsu/lely-golf-estates-beautification-advisory-committee/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Dan Schumacher at (239) 252-5775.

###

GOLF ESTATES BEAUTIFICATION MSTU

ADVISORY COMMITTEE

8300 Radio Road
Naples, FL 34104

AGENDA

MARCH 20TH, 2025

I. CALL TO ORDER

II. ATTENDANCE

-Vacant - Chair
Kathleen Dammert - Vice Chair (10/1/26)
Dimitra Arneson (10/1/26)
Linda Rae Jorgensen (10/1/25)
Lisa McGarity (10/1/25)

Brian Wells – Director, PTNE Division
Dan Schumacher – Project Manager
Rosio Garcia – Operations Coordinator
Michael McGee – McGee & Associates
Armando Yzaguirre – A&M Property Maint.
Wendy Warren – Premier Staffing

III. APPROVAL OF AGENDA

IV. APPROVAL OF MINUTES – FEBRUARY 20TH, 2025

V. CHAIR'S REPORT

VI. CONTRACTOR REPORTS

- **A. LANDSCAPE ARCHITECT'S REPORT** – M[c]Gee & Associates (M&A)
- **B.** Landscape Maintenance – A&M Property Maintenance (A&M)

VII. PROJECT MANAGER'S REPORT – DAN SCHUMACHER

- **A. BUDGET REPORT**
- **B. LIGHTING INSPECTION REPORT**
- **C. RADAR SPEED REPORT**
- **D.** Application to the Advisory Committee
  1. Michael Mann

VIII. ONGOING BUSINESS

- **A.** Traffic Signage – Transfer from Lely Civic Assn to the MSTU
- **B.** Sign Lights
- **C.** Entryway Lighting Circuits

IX. NEW BUSINESS

X. COMMITTEE MEMBER COMMENTS

XI. PUBLIC COMMENT

XII. ADJOURNMENT

NEXT MEETING:

APRIL 17TH, 2025 AT 2:00 PM
South Regional Library
8065 Lely Cultural Pkwy
Naples, FL 34113, (239) 252-7542

GOLF ESTATES BEAUTIFICATION MSTU

ADVISORY COMMITTEE

8300 Radio Road
Naples, FL 34104

Minutes

February 20, 2025

I. Call to Order

The meeting was called to order at 2:04 P.M. Roll call was taken, and a quorum of four was established.

II. Attendance

Committee Members: Open Seat, Chair; Kathleen Dammert, Vice Chair; Linda Jorgensen, Lisa McGarity, Dimitra Arneson
County Staff: Brian Wells, Director, PTNE Division (ZOOM); Dan Schumacher, Project Manager, PTNE Division; Rosio Garcia, Operations Analyst, PTNE Division
Contractors: Mike McGee, Landscape Architect, McGee & Associates (Excused); Armando Yzaguirre, A&M Property Maintenance; Wendy Warren, Premier Staffing
Others: Laura Mann, Resident; Michael Mann, Resident; John Clifford

III. Approval of Agenda

Ms. McGarity moved to approve the Agenda of the Lely Golf Estates Beautification MSTU Advisory Committee as presented. Second by Ms. Jorgensen. Carried unanimously 4 - 0.

IV. Approval of Minutes – January 16, 2025

Ms. McGarity moved to approve the Lely Golf Estates Beautification MSTU Advisory Committee meeting minutes of January 16, 2025, as presented.
Second by Vice Chair Dammert. Carried unanimously 4 - 0.

V. Chair's Report

Summary reports will be provided at future meetings.

VI. Contractor Reports

A. Landscape Architect's Report – McGee & Associates (M&A)

Mr. Schumacher summarized the February 6, 2025, observation report.
(The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).

Maintenance Areas

1. St. Andrews Blvd.
2. Forest Hills Blvd. & Cart Crossing
3. Valley Stream Circle
4. Pebble Beach Blvd. & Cart Crossing
5. Thorncrest, Briarcliff, and Heather Grove Lanes (cul-de-sacs)
6. Baltusrol Drive & Cart Crossing
7. Doral Circle
8. Rattlesnake Hammock Rd.

Comments

- The area of landscaping is well trimmed.
- Quotes were received from A & M Property Maintenance for plant replacements as specified in McGee & Associates Summary Report.
- Tree Scaping of Naples submitted a proposal, based on the updated tree inventory, to remove six trees, two stumps and prune palm and deciduous trees. Trimming will be scheduled for early March.
- County brown mulch will be applied upon the completion of tree pruning and installation of plant replacements.
- A decoder controller will be ordered for Zone 10 of the HydroPoint irrigation system.

B. Landscape Maintenance Report – A & M Property Maintenance (A&M)

Mr. Yzaguirre reported routine maintenance is being performed on schedule.

Ornamental Trees

- A nursery has been identified as a source for ornamental trees.
- The forty-five-gallon trees are available for delivery and installation in two to three months.
- A duckbill tree anchor system will be installed.
- Mr. McGee will be consulted to approve the nursery and view the trees prior to delivery.
- A & M will provide a quote for delivery of four ornamental trees, installed, to Mr. Schumacher.

Ms. McGarity motioned to approve the purchase and installation of four forty-five-gallon ornamental trees for the community at a cost not to exceed $5,000.00. Second by Ms. Jorgensen. Carried unanimously 4 – 0.

VII. Project Manager's Report – Dan Schumacher

Mr. Schumacher reported:

A. Budget Report

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Lely Golf Estates MSTU Fund 1620 Budget for February 20, 2025, prepared February 11, 2025.

- Purchase Orders
  1. A & M Property Maintenance (A&M)
     - Incidentals are for landscape refurbishment and miscellaneous.
     - Grounds Maintenance is for regularly scheduled tasks and irrigation repairs.
  2. Collier County PUD – Water
  3. FPL – Electricity
  4. Howard Fertilizer & Chemical Co.- Fertilizer
  5. McGee & Associates – Landscape Architecture
  6. Premier Staffing – Transcription Services
  7. Sight N Sound, dba Naples Christmas Lighting – Holiday Decorations
  8. Simmonds Electrical – Electrical Maintenance and LED Fixtures
  9. SiteOne Landscape Supply – Irrigation Parts & Pumps
  10. Traffic Logix – Digital Solar Radar
  11. Tree Scaping of Naples – Tree Pruning and Removal

- Budget Summary
  a. Line 1, Revenue – Of the $432,700 millage assessed, $366,258 has been collected, leaving an outstanding balance of $66,441.
  b. Line 2, Carry Forward – Unexpended Prior Year (2024) Funds $394,545.
  c. All Revenues – Of the $827,245 budgeted, $366,258 has been collected leaving an available balance of $460,987 (the sum of lines 1 and 2) minus Expenditures.
  d. Line 21, Operating Expense – Of the $366,645 budgeted, $141,501 is committed to existing Purchase Orders and $78,539 is expended, leaving the remainder of $146,605 available within budget for additional operating expenses as needed.
  e. Line 25, County Overhead – Of the $80,000 budgeted, $9792 has been transferred, and a balance of $70,207 remains for transfer (PTNE Staff & Overhead, Property Appraiser, & Tax Collector).
  f. Line 27, Capital Projects – A balance of $230,600 remains for improvement projects.
  g. Line 29, Capital Reserves - $150,000 is reserved for catastrophic events.
  h. Line 30, All Expenses – Of the $827,245 budgeted, $141,501 is committed in existing Purchase Orders, $88,331 has been expended, leaving the remainder of $597,412 available for MSTU expenditures.

- General
  a. MSTU Tax Rate: 2.00 Mills (0.2%) is for beautification improvements and maintenance within the taxing district.
  b. The millage of 2.00 per $1,000 of Ad Valorem taxable value is reviewed annually in March or April.
  c. Tax millage collected and interest by the Lely Golf Estates Beautification MSTU may only be utilized by the MSTU and within the MSTU district boundary.

Mr. Schumacher noted:

- Uncommitted funds available within budget are eligible for transfer to other categories upon approval by the Committee.
- The A & M Property Maintenance *Incidentals* budget will exceed the plan. Funds are available to offset the shortfall.
- The Office of Budget Management will be consulted to determine if the sign light replacement project for St. Andrews Boulevard and Doral Circle will be debited from the Lighting Maintenance or Capital Projects category.
- The Doral Sign renovation project will be debited from the Capital Projects category.
- The *Asset Management Plan* report to estimate useful life of MSTU assets and corresponding expenditure projections to fund maintenance will be updated during the 2026 planning process.
- The Ad Valorem taxable value increased 5.42% for fiscal year 2025 over 2024 generating additional revenue of $68,920.

B. Lighting Inspection Report and Light Pole Replacements

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Mr. Schumacher reported:

- February 6, 2025, report indicated:
  - St. Andrews Blvd: five (5) single luminaire and one (1) entry light sign outages. The US and State Flagpoles lights are also not functioning.

- Doral Circle: two (2) sign light outages.
- Simmonds Electrical indicated outages may be caused by a circuit malfunction.
- A quote for a diagnostic assessment and repair estimate will be solicited.
- All lamp poles are fitted with Lumec-brand LED replacements.

Sign Light Fixtures

Mr. Schumacher reported:

- A total of fourteen (14) LED light fixtures are required to replace existing sign lights, five (5) for each of the two monuments at St. Andrews Blvd and two (2) for each side of the two-sided sign at Doral Circle.
- Simmonds Electrical visited the site and noted the fixtures are corroded.
- Standard four (4) foot fixtures with LED linear bars or bulbs are recommended.
- Specifications will be confirmed and a *Request for Quote* (RFQ) for equipment and installation solicited.
- He will email the quote to the Committee members.

C. Radar Speed Report

Mr. Schumacher reported:

Radar Speed Sign Report

Two (2) Traffic Logix SafePace 100 speed monitoring signs are functioning on Saint Andrews Boulevard, eastbound by the Lely Presbyterian Church (*Radar 1*) and westbound at Pine Valley Circle (*Radar 2*).

Daily vehicle report statistics from January 14, 2025, to February 14, 2025:

- Radar 1 (110 St Andrews Blvd) recorded 67,908 vehicles averaging 2,264 vehicles per day. The maximum speed was fifty-one to fifty-five (51 - 55) mph.
- Radar 2 (255 Saint Andrews Blvd) recorded 69,348 vehicles for an average of 2,312 per day. The maximum speed was sixty-six to seventy (66-70) mph.
- The data indicated most vehicles were traveling between twenty-one (21) and thirty-five (35) mph. The speed limit is twenty-five (25).
- Discussions ensued noting the reduction in average speed recorded in the community.

Ms. McGarity *reported that she has a meeting scheduled with the Traffic Operations week ending March 1,2025.*

D. Applications to the Advisory Committee

Mr. Schumacher reported Dimitra Arneson's appointment to the Committee was confirmed by the Board of County Commissioners effective February 11, 2025, and an application was received from Michael E. Mann for the open seat on the Lely Golf Estates Beautification Advisory Committee.

Recommendation for Michael E. Mann

Ms. McGarity moved to recommend the Board of County Commissioners appoint Michael E. Mann to the Lely Golf Estates Beautification MSTU Advisory Committee. Second by Ms. Jorgensen. Carried unanimously 4 - 0.

Michael Mann's recommendation for appointment to the Lely Golf Estates Beautification MSTU Advisory Committee will be considered by the Board of County Commissioner's (BCC) in March 2025.

VIII. Ongoing Business

A. Traffic Signage – Transfer from Lely Civic Association to the MSTU

Mr. Schumacher reported:

Transfer of Decorative Traffic Signs from Lely Civic Association to the MSTU

- The Executive Summary and request for approval to proceed with the transfer is on the Board of County Commissioners (BCC) Consent Agenda for March 2025.
- The transfer, at no cost to the MSTU, includes:
  - Sixty-two signs on decorative poles (37street and STOP signs and twenty-five speed limit signs).
  - Fourteen signs installed by the Traffic Operations Division (on standard poles with consideration given for installation on new decorative post).
- Upon completion of the transfer a Request for Quote (RFQ) to supply and install signs, specified to withstand hurricane force winds, will be distributed to three vendors or a supplier on contract with the County.
- The sign project will be funded from the Capital Projects category.

IX. New Business

A. Projects

Mr. Schumacher will update the Committee on the status of projects for 2025 during the year.

B. Election of Officers

The item will be discussed at the March meeting.

X. Committee Member Comments

None

XI. Public Comments

John Clifford volunteered to analyze the Traffic Logix data over a one-year period to identify trends.

Mr. Schumacher took the offer under advisement and will report on the decision at a future meeting.

XII. Adjournment

There being no further business to come before the Committee, the meeting was adjourned by Mr. Schumacher at 2:56 P.M.

LELY GOLF ESTATES BEAUTIFICATION MSTU ADVISORY COMMITTEE

_____

Chair

These Minutes were approved by the Committee on _____,2025 as presented ___ or as amended ___.

Lely Golf Estates Beautification MSTU/CollierPTNE

NEXT MEETING: **MARCH 20, 2025 – 2:00 PM**

SOUTH REGIONAL LIBRARY
8065 LELY CULTURAL PARKWAY
NAPLES, FL 34113
239.252.7542

McGee & Associates
Landscape Architecture

Project: LELY GOLF ESTATES BEAUTIFICATION, M.S.T.U. **Landscape Architect Observation Report:** March 2025
Location: MSTU DISTRICIT ROADWAYS
Project Manager: Dan Schumacher, Collier County Public Services Division, Public Transportation & Neighborhood Enhancements Department
Consultant: McGee & Associates **Consultant's Representative:** Michael A. McGee, rla, isa
Contractor: A & M Property Management **Contractor's Representative:** Armando Yzaguirre
Report Date: FY24-25, 3/6/2025 **Observation Date:** 3/6/2025 **Report No.** 5 (FY25)

AC - Indicates major or repeating items recommended to be discussed by the Advisory Committee
S - Indicates items to be addressed by staff. **C** - Indicates items to be addressed by Contractor
Contractor is requested to address items as soon as possible and indicate in **RESPONSE/COMMENTS** column when and which items are corrected.
Note: Copy picture out of comment boxes a*nd then paste to additional sheet if picture is desired in larger size.*

LOCATION/WORK AREA	AC	S	C	R	OBSERVATION & RECOMMENDATIONS	ADDITIONAL COMMENTS
All locations						Strikethrough indicates items that have been addressed or are being addressed and will be removed from the next month's report. Yellow highlighting indicates items that need to be addressed as soon as possible for safety issues, potential plant damage or to reduce future maintenance issues.
St. Andrews Blvd. & US 41 Inbound R/W South		X	X		One large stem with white flagging tape on the Pandanous pine has died and needs to be pruned off due to the previous lighten strike.	
		X	X		Multiple Paurotis palm stems marked with white paint that are too close to the sidewalk need to be removed. Also review stems that are too close to the sign structure or are dead.	
		X	X	4	Two Alexander palms directly adjacent to the Royal palm hit by lightning have died. It appears the palms may have been also affected by the lightning strike, because no sign of disease is apparent. Replacement is recommended with (2) 10-foot clear trunk Alexander palms. Removal should be by excavation.	
		X	X	6	The 3rd large Royal palm from US 41 within the shopping center plantings that are under the control of the MSTU appears to have been hit by lightning. Removal and replacement is recommended. Replacement is recommended to have 8-foot of gray trunk.	
Outbound R/W North Suncoast Credit Union side		X	X		Annual plantings are dry. Recommend an increase in watering	
		X	X		One irrigation valve box is missing its lid.	
		X	X		Prune off sign wall attached Ficus vine and treat with herbicide.	
		X	X		Sign banding has fallen off as well as has separated from its base.	
		X	X		Multiple Paurotis palm stems marked with white paint that are too close to the sidewalk need to be removed. Also review stems that are too close to the sign structure or are dead.	
		X	X		At the shopping center entry there is 33 l.f.+/- of perennial peanut between sidewalk and valley gutter that has torpedo grass in it. Recommended spraying areas for toal kil and then replanting with two staggered rows of (65) perennial peanut 'Golden Glory', 1 gal. 12" o.c.	
St. Andrews Blvd.						

McGee & Associates
Landscape Architecture

LELY GOLF ESTATES BEAUTIFICATION, M.S.T.U. **Report Date:** FY24-25 3/6/2025 **Observation Date:** 3/6/2025 **Report :** 5 (FY25)

LOCATION/WORK AREA	AC	S	C	R	OBSERVATION & RECOMMENDATIONS	ADDITIONAL COMMENTS
Median #1		X	X		Turf areas should be treated to remove sedge weeds.	
		X	X	4	~~One Tabebuia tree has storm damage branches in top of tree that need to be addressed during next scheduled tree trimming.~~	
		X	X	9	On the inbound side there are two Foxtail palms that have Ganoderma disease, and it is recommended they be removed as soon as possible by excavation to remove as much as possible of the infected palm root systems and then backfill with clean native local topsoil. Palms have white flagging at the bases. Recommendation for any plant replacement if determined will come after palms are removed.	
Median #2		X	X	4	~~One Tabebuia tree has storm damage branches in top of tree that need to be addressed during next scheduled tree trimming.~~	
Median #3		X	X	4	East median end: Perennial peanut need additional fill in plants. (15) 1 gal. 'Golden Glory'	
Median #4		X	X	4	East median end: Perennial peanut need additional fill in plants. (20) 1 gal. 'Golden Glory'	
Median #5		X	X	4	~~At address 240: Plumbago shrub bed is very dry defoliated and defoliating plants.~~	
		X	X		At address 255: Foxtail palm is in decline due to Ganoderma disease. Removal by excavation recommended. Replant opening with (1) dwarf Bougainvillea 'Helen Johnson' 3 gal. Also at this location a previous Foxtail was removed just west of this one. It is recommended a Queen's Crape myrtle be planted. Lagstroemia speciosa 'Queen's Crape Myrtle', 10'–12' ht., 2.5" cal., 5' spr., 32" B&B or 45 Gal. Single leader trunk.	
Median #6		X	X	2	At address 220-231: 50% of Plumbago shrub bed is defoliated and/or dead. The cause of loss could be from previous disease, insects or water issues. Contractor should review and comment. Also provide count for replacements at 3 gal. size.	MA 03/06/25: Recommend due to the number of dead plants that the entire bed of Plumbago be removed and areas replanted with two staggered rows of 3 gal. Muhly grass. (49) 24 in one row 25 in other at 30-inches off back of curb.
		X	X	10	At address 243: Holly tree is dying and needs to be removed by excavation. Recommended replacement is with a Lagerstroemia fauriei 'Muskogee' – Crape myrtle 30 gal., 2" cal, 8'-10' ht., 5'-6' spr. multi-stem (4 min.)	
Median #7		X			No major issues observed.	
Median #8		X			Sewer lift station antenna was replaced and old one left in Podocarpus shrubs.	
	X	X	X	11	East end: Approximately (16) dwarf Bougainvillea are defoliated and half of them have heavy stem decline. Recommended to consider renovation of this Bougainvillea planting area.	M&A 3/7/24: There are (8) missing or declined Bougainvillea 'Helen Johnson'. Replacement is recommended to occur in rainy season with 3 gal. size plants.
Median #8A		X	X		No major issues observed.	
Median #9		X	X		No major issues observed.	
Median #10		X	X	10	At address 379: (8) Bougainvillea 'Helen Johnson' are missing or declined and need replacements. Replacement is recommended to occur in rainy season with 3 gal. size plants.	M&A 5/1/24: At the request of the Committee a review was performed on St. Andrews Blvd. median #10 and the following was forwarded to the project manager. East half of median needs (22) dwarf Bougainvillea 3 gal. replacements; on the west half (15) dwarf Bougainvillea 3 gal. replacements; On the east end the existing perennial nut plantings contains large number of weeds that has resulted in, after the weeds are addressed, (35-40) 1 gal.

LELY GOLF ESTATES BEAUTIFICATION, M.S.T.U. **Report Date:** FY24-25 3/6/2025 **Observation Date:** 3/6/2025 **Report :** 5 (FY25)

LOCATION/WORK AREA	AC	S	C	R	OBSERVATION & RECOMMENDATIONS	ADDITIONAL COMMENTS
						size Golden Glory perennial peanut replacements will be needed to fill the bed. An alternate to peanut replacement would be to remove remaining peanut and install (68) 1 gal. Orange Bulbine on 18" centers.
Forest Hills Blvd						
Median #11		X	X		No major issues observed.	
Median #12		X	X	5	At address 420 & 426: There appears to be a missing tree. Replacement is recommended with a Lagerstroemia fauriei 'Muskogee' – Crape myrtle 30 gal., 2" cal, 8'-10' ht., 5'-6' spr. multi-stem (4 min.)	
		X	X	8	At address 450: Ilex tree is in complete decline due to main trunk and branch rot due to poor compartmentalization from damaged branch removal. Recommend replacement with Queen's Crae mrytle. Lagstroemia speciosa 'Queen's Crape Myrtle', 10'–12' ht., 2.5" cal., 5' spr., 32" B&B or 45 Gal. Single leader trunk.	
		X	X	14	At address 407: Auto accident has occurred with the following damage. (2) double Alexander palms destroyed, (9) dwarf Bougainvillea and (4) dwarf Fire bush. After cleanup another review will be performed to get final counts of shrub damage. (2) irrigation heads need review. (photo)	 
Forest Hills Cart Crossing & Lake		X	X		No major issues observed.	
Valley Stream Cr. Median #13		X	X	4	5 Plumbago shrubs appear to have died. Replacement recommended with 3 gal. size.	
		X	X	5	Median needs mulch.	
	X	X		24	The south purple Trumpet tree rolled over during the storm. It was observed that the trunk had rotated out of the root ball and may have broken some main roots. Based upon what was observed while the tree was down it is recommended this tree be replaced because it may no ever re-root properly and become secure.	M&A 05/04/23: Handroanthus impetiginosis (Purple Trumpet tree) 11'-13' Ht., 3.5 Cal., 5'-6' Spr., 36" dia. B&B or 65 Gal. size container.
Pebble Beach Blvd.						
Median #14		X	X	4	South median end: Perennial peanut need additional fill in plants. (10) 1 gal. 'Golden Glory'	
Median #15		X	X		Address 16 thru 24: Median had minor flooding with mulch washed outside of median.	
Median #16		X	X		Address 24 thru 32: Median had minor flooding with mulch washed outside of median.	
Median #17		X	X		Address 108: Previous Holly tree replacement has died. Contractor needs to comment on reason if other than maintenance related issue and/or provide replacement.	
	X	X	X		The north and south ends of median have large areas of declined and/or dead dwarf Bougainvillea, which renovation is recommended at this time. A meeting discussion with the committee is recommended.	
		X	X		Address 132 thru 148: Median had minor flooding with mulch washed outside of median.	

McGee & Associates
Landscape Architecture

LELY GOLF ESTATES BEAUTIFICATION, M.S.T.U. **Report Date:** FY24-25 3/6/2025 **Observation Date:** 3/6/2025 **Report :** 5 (FY25)

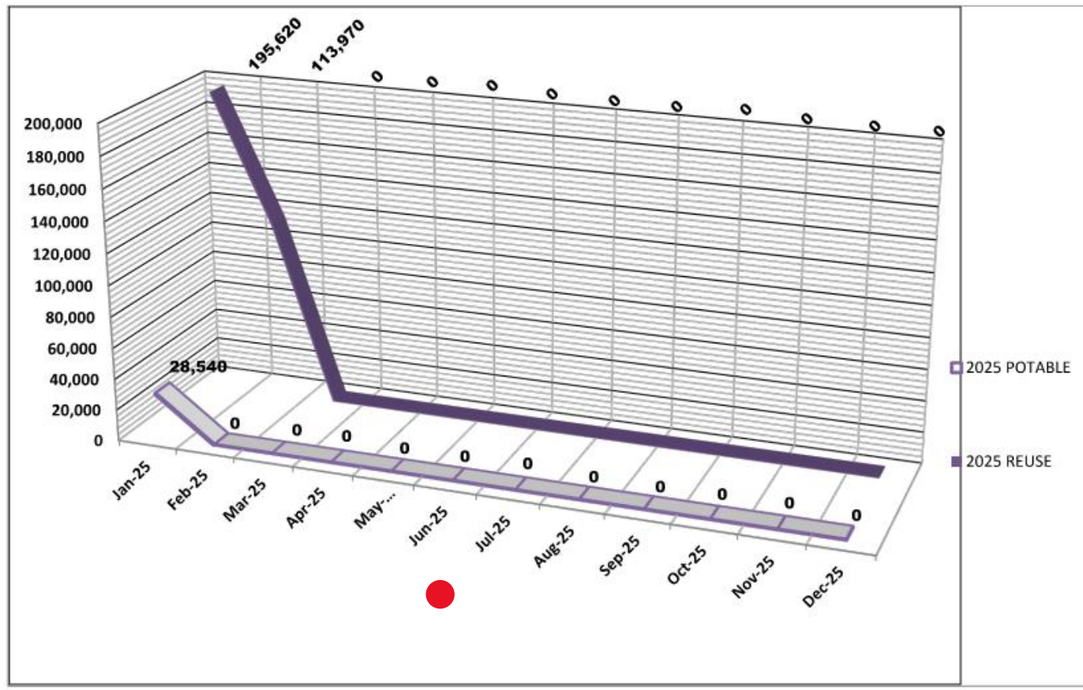
LOCATION/WORK AREA	AC	S	C	R	OBSERVATION & RECOMMENDATIONS	ADDITIONAL COMMENTS
		X	X	7	It is recommended that all the Bougainvillea in this median be fertilized in July with 8-0-10 fertilizer at a rate of 4 ounces per shrub applied directly around the main stem of the shrubs.	
Median #18		X	X		Address 151 thru 164: Median had minor flooding with mulch washed outside of median.	
		X	X	9	At address 156: (9) Bougainvillea 'Helen Johnson' are missing or declined and need replacements. Replacement is recommended to occur in rainy season with 3 gal. size plants.	
Median #19		X	X		No major issues observed.	
Pebble Beach Blvd. Golf Cart Crossing		X	X	2	Multiple (10+/-) Plumbago shrubs are defoliated in beds. Recommend pruning out dead wood and then reviewing for replacements. 3 gal. size	
		X		5	On the southwest corner one Foxtail palm has lost its entire bud and foliage. Remove and replace with 10' clear trunk Foxtail recommended.	
		X			The golf course side of the four beds was not mulched. Mulch is recommended to reduce weeds and thus reduce herbicide applications.	
Thorncrest Ln. cul-de-sac #20	X	X			Due to age and amount of decline it is recommended to renovate this cul-de-sac during this rainy season.	M&A 09/08/22: Renovation on hold, Remove dead plants. M&A 11/4/22: (15-20) dwarf Bougainvillea plants are dead, missing or declined and need to be replaced. Replace with Bougainvillea 'Helen Johnson' 3 gal. size
Briarcliff Ln. Cu-de-sac #21	X	X			Due to age and amount decline it is recommended to renovate this cul-de-sac during this rainy season.	M&A 09/08/22: Renovation on hold
Heather Grove Ln. Cul-de-sac #22		X			(8) Bougainvillea plants on the eastern side have been run over and need to be reviewed for removal. Any replacements would need to wait until rainy season has started.	
Baltusrol Signs		X	X	3	Each sign location has missing, declined or additional Bulbine plants.Total of (22) Bulbine 1 gal. (11) each sign, plants. Inbound sign could also use additional (3) Plumbago shrubs 3 gal. replacements.	
Doral Cr. East R/W		X			Mulch was not applied along the vacant lot side of the Podocarpus hedge, Liriope & Plumbago bed.	
		X	X	16	The first Tabebuia tree from Rattlesnake Hammock Rd. needs to be replaced due to previous hurricane damaged. Install Handoanthus chrysotrichus 'Golden Trumpet Tree', 11'–13' ht., 3.5" cal., 5'-6' spr., 36" B&B or 65 Gal. Single leader trunk.	M&A 9/5/24: Based upon supply of replacement trees the existing tree will reviewed with contractor to advise on corrective pruning.
West R/W & Rattlesnake Hammock Rd.		X	X		No major issues observed.	
		X	X		Mulch was not applied along the house side of the Podocarpus. There is also dumped concrete debris that should be removed so plant scan be mulched properly.	
Median #23		X	X	~~2~~	~~Treat multiple ant beds along the back of curbing.~~	
		X	X	4	One Alyssum annual has died.	M&A 1-2-25: Roadway paving operations around median may have damaged more annuals. If replanting an additional (5) Salvia could be added on inbound side. M&A 2-6-25: (8) Alyssum are dead or heavily declined with yellow foliage. Recommended removal and replacement. Reduce watering if not already adjusted.
				3	~~Two~~ Three Ixora 3 gal. shrubs have declined and need to be replaced. Based upon other plant growth if existing Ixora could be relocated that would be acceptable.	

McGee & Associates
Landscape Architecture

LELY GOLF ESTATES BEAUTIFICATION, M.S.T.U. **Report Date:** FY24-25 3/6/2025 **Observation Date:** 3/6/2025 **Report :** 5 (FY25)

LOCATION/WORK AREA	AC	S	C	R	OBSERVATION & RECOMMENDATIONS	ADDITIONAL COMMENTS
		X	X	4	It is recommended (2) White Gieger trees be planted at variegated ginger locations to create shade for ginger. Cordia boissieri White Geiger, ≥ 7' ht., 3" cal., > 4' spr., 32" B&B or 45 Gal. Single leader trunk.	
		X	X	6	Recommended replacement Tree for Golden Trumpet Tree in median #23, Bulnesia arborea 'Verawood Tree', 11'–13' ht., 3.5" cal., 5'-6' spr., 36" B&B or 65 Gal. Single leader trunk.	
		X	X			
Median #24 Treasure Point Cul-de-sac		X	X			
Warren St. Pumping Station		X	X		No major issues observed. See water use schedule.	
Valley Stream Cr. Irrigation					No major issues observed. See water use schedule.	
Fertilization		X	X		See FY23-24 recommended schedule.	

Lely Golf Estates Beautification MSTU Reuse Mixing Chamber Annual Water Use thru 2/25



Notes: 2023 Total Water Use: Reuse 1,846,930 gallons, Potable 188,030 gallons
2024 Total Water Use: reuse 1,378,290 gallons, Potable 24,720.10 gallons

3/6/2025

Warren Street Mixing Chamber Water Use Data: 2/2025

DATE	REUSE PSI	POTABLE WATER METER (X 100)	POTABLE WATER USE GALLONS	REUSE WATER METER READING (X x 100)	REUSE WATER USE GALLONS	TOTAL WATER APPLIED
2/2/2025	84	85,500.40		76,408.80		-
2/11/2025	84	85,500.40	-	76,932.70	52,390.00	52,390.00
2/17/2025	84	85,500.40	-	77,240.60	30,790.00	30,790.00
3/1/2025	84	85,500.40		78,109.40	30,790.00	30,790.00
		TOTALS:	**0.00**		**113,970.00**	**113,970.00**
		PERCENTAGE OF TOTAL VOLUME USED	**0.0%**		**100.0%**	

Valley Stream Circle Water Use Data: 2/2025

DATE	POTABLE WATER METER READING (X 1)	POTABLE WATER USE GALLONS
2/2/2025	723240.04	
2/11/2025	727840.05	4600
2/17/2025	729140.04	1300
3/1/2025	736620.05	7480
		13,380

LELY GOLF ESTATES M.S.T.U.
Fund 1620
March 20, 2025

	FY-25	Vendor	Item	PO#	Budget	Commitments	Expenditures	Available
1	MILLAGE COLLECTED & INTEREST		MSTU Revenues		$ (432,700.00)	$ -	$ (393,664.92)	$ (39,035.08)
2	CARRY FORWARD		Unexpended Prior Year Funds		$ (394,545.72)	$ -	$ -	$ (394,545.72)
	ALL REVENUES				**$ (827,245.72)**	**$ -**	**$ (393,664.92)**	**$ (433,580.80)**
		McGee & Associates	Landscape Architect (FY-25)	4500234203		$ 18,600.85	$ 2,774.15	
		McGee & Associates	Landscape Architect (FY-24)	4500228493			$ 886.75	
3	ENG. FEES & OTHERS				**$ 32,595.20**	**$ 18,600.85**	**$ 3,660.90**	**$ 10,333.45**
4	INDIRECT COST REIMBURSE	Collier County	Indirect Cost	Direct Pay	$ 6,900.00	$ 3,450.00	$ 3,450.00	$ -
		A&M Property Maint	Landscape Incidentals	4500234775	$ 45,000.00	$ 32,091.49	$ 12,908.51	
5	LANDSCAPE INCIDENTALS (634990)				**$ 40,000.00**	**$ 32,091.49**	**$ 12,908.51**	**$ (5,000.00)**
					$ 80,200.00	$ -	$ -	$ -
		A&M Property Maint	Grounds Maintenance	4500234775	$ 60,000.00	$ 22,824.80	$ 37,175.20	$ -
6	OTHER CONTRACTUAL (634999)				**$ 140,200.00**	**$ 22,824.80**	**$ 37,175.20**	**$ 80,200.00**
		Tree Scaping	Tree & Palm - Removal	4500235300	$ 5,000.00	$ 5,000.00	$ -	
		Tree Scaping	Tree & Palm - Pruning	4500234131	$ 15,000.00	$ 15,000.00	$ -	
		Naples Electric Motor Works	Pump Station Services	4500234618	$ 3,000.00	$ 3,000.00	$ -	
7	OTHER CONTRACTUAL (639990)				$ 25,000.00	$ 23,000.00	$ -	$ 2,000.00
8	ELECTRICITY	FPL	Electricity	4700005159	$ 5,200.00	$ 3,633.07	$ 1,566.93	$ (0.00)
9	WATER AND SEWER	Collier County Public Utilities	Water - Irrigation	4700005160	$ 10,000.00	$ 6,737.27	$ 3,262.73	$ (0.00)
	Building RM	Collier County	Bldg Repairs				$ 152.20	$ (152.20)
10	INSURANCE GENERAL	Collier County	Insurance	Direct Pay	$ 700.00	$ 350.00	$ 350.00	$ -
11	SPRINKLER SYSTEM	SiteOne	Irrigation Parts & Pumps	4500234776	$ 5,000.00	$ 2,987.23	$ 512.77	$ 1,500.00
12	MULCH				$ 10,000.00		$ -	$ 10,000.00
		Simmonds Electrical (FY24)	Electrical Services	4500227629		$ 8,885.69	$ 18,164.83	
		Simmonds Electrical (FY25)	Electrical Services	4500234130	$ 5,000.00	$ 4,677.91	$ 322.09	
13	LIGHTING MAINTENANCE				**$ 57,050.52**	**$ 13,563.60**	**$ 18,486.92**	**$ 25,000.00**
14	LICENSE & PERMITS				$ 2,000.00	$ -	$ -	$ 2,000.00
		Naples Christmas Lighting	Holiday Decorations	4500235068	$ 4,600.00	$ -	$ 4,600.00	
		Premier Staffing	Transcription	4500234230	$ 2,977.90	$ 2,250.25	$ 727.65	
15	OTHER MISCELLANEOUS (649990)				**$ 13,000.00**	**$ 2,250.25**	**$ 5,327.65**	**$ 5,422.10**
16	OFFICE SUPPLIES				$ 100.00	$ -	$ -	$ 100.00
17	COPYING CHARGES	J.M. Todd	Copier CPC	4500234730	$ 200.00	$ 75.50	$ 74.50	$ 50.00
18	FERT HERB CHEM	HOWARD FERTILIZER & CHEMICAL	FERTILIZER & CHEMICALS	4500234348	$ 3,500.00	$ 291.20	$ 1,708.80	$ 1,500.00
	COMPUTER SOFTWARE	TRAFFIC LOGIX CORP	Digital Solar Radar	4500237098	$ -	$ -	$ 1,700.00	$ (1,700.00)
19	OTHER OPERATING				$ 200.00	$ -	$ -	$ 200.00
20	TRAFFIC SIGNS				$ 15,000.00	$ -	$ -	$ 15,000.00
21	**OPERATING EXPENSES**				**$ 366,645.72**	**$ 129,855.26**	**$ 90,337.11**	**$ 146,453.35**
22	PTNE STAFF & DIVISION OVERHEAD (911011)				$ 66,700.00	$ -	$ -	$ 66,700.00
23	PROPERTY APPRAISER (930600)				$ 3,400.00	$ -	$ 1,580.76	$ 1,819.24
24	TAX COLLECTOR (930700)				$ 9,900.00	$ -	$ 8,706.55	$ 1,193.45
25	**COUNTY OVERHEAD**				**$ 80,000.00**	**$ -**	**$ 10,287.31**	**$ 69,712.69**
26	IMPROVEMENTS GENERAL				$ 230,600.00	$ -	$ -	$ 230,600.00
27	**CAPITAL PROJECTS**				**$ 230,600.00**	**$ -**	**$ -**	**$ 230,600.00**
28	RESERVES FOR INSURANCE				$ 150,000.00	$ -	$ -	$ 150,000.00
29	**CAPITAL RESERVES**				**$ 150,000.00**	**$ -**	**$ -**	**$ 150,000.00**
30	**ALL EXPENSES**				**$ 827,245.72**	**$ 129,855.26**	**$ 100,624.42**	**$ 596,766.04**
31	**FY-25 BUDGET GRAND TOTAL**		= ALL REVENUES - ALL EXPENSES		**$ -**	**$ 129,855.26**	**$ (293,040.50)**	**$ 163,185.24**

LELY GOLF ESTATES M.S.T.U.
Fund 1620
March 20, 2025

92,697,303	FY 13 Final Taxable Value	-3.3%		
95,718,423	FY 14 Final Taxable Value	3.3%		
99,596,489	FY 15 Final Taxable Value	4.1%		
106,888,467	FY 16 Final Taxable Value	7.3%		
116,823,687	FY 17 Final Taxable Value	9.3%		
127,802,080	FY 18 Final Taxable Value	9.4%		
135,136,761	FY 19 Final Taxable Value	5.7%		
142,494,654	FY 20 Final Taxable Value	5.4%		
152,194,183	FY 21 Final Taxable Value	6.8%		
156,289,928	FY 22 Final Taxable Value	2.7%		
180,384,272	FY 23 Final Taxable Value	##########	+6.3% Average	
203,796,660	FY 24 Final Taxable Value	##########		
$214,844,295	**FY 25 Gross Taxable Value**			
5.42%	**Adjustment FY 24 to FY 25**			
	FY 25 Gross MSTU Revenue	FY 24		
Millage	**2.0000**	2.0000	**2.0 mill cap**	
Tax Dollars	**$429,688.59**	$407,600	**$68,920**	**Increase**

Total Available Balance	**$**	**596,766.04**
Plus Commited And Not Spent	**$**	**129,855.26**
Estimated Cash	**$**	**726,621.30**

Prepared 03/11/25 GH

Count by Speed Range Report

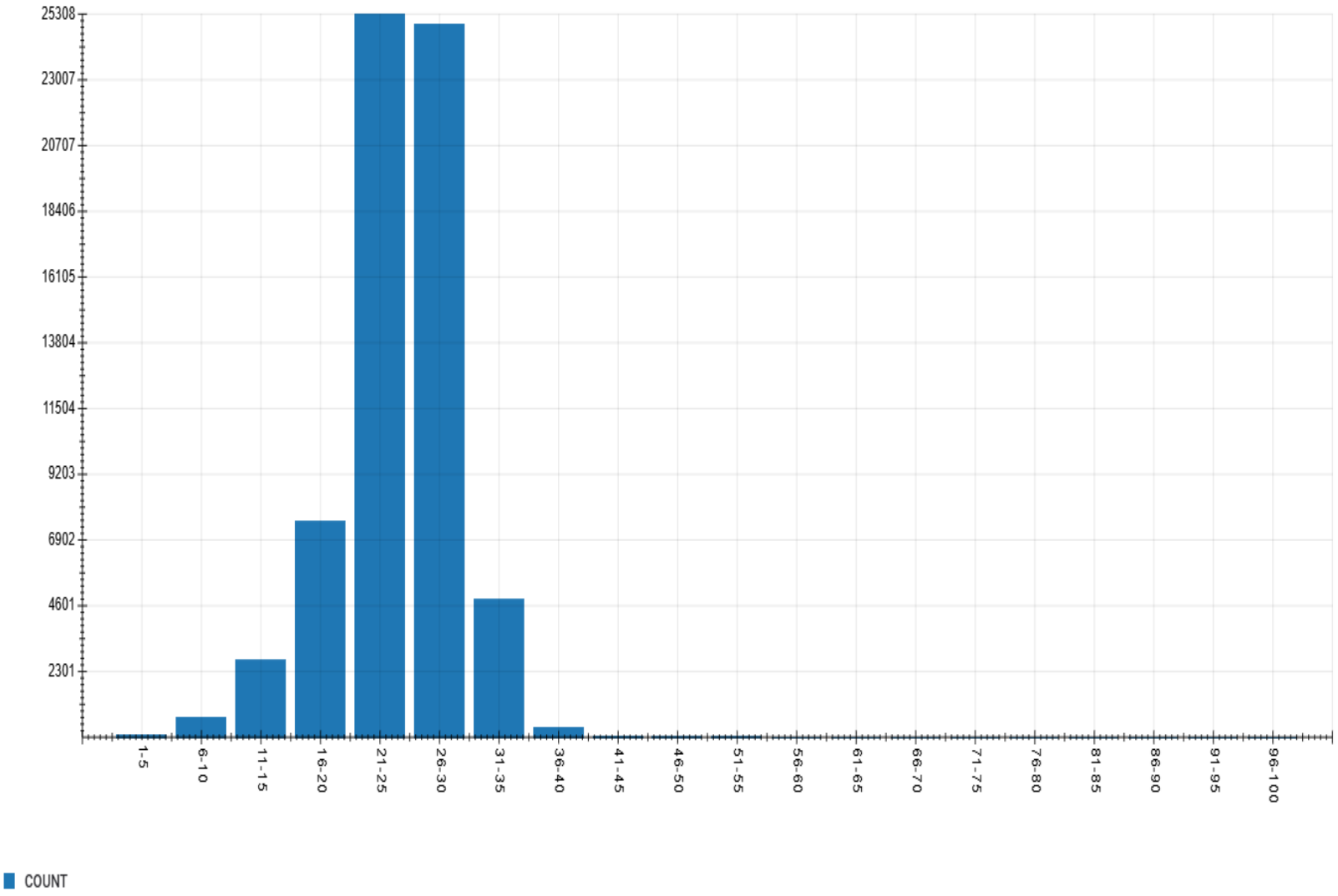
Location: Radar 1

Address: 110 Saint Andrews Blvd

Report period: 2025-02-15 to 2025-03-16

Count By Speed Range

Speed (mph)	Count
1-5	56
6-10	706
11-15	2692
16-20	7544
21-25	25308
26-30	24961
31-35	4815
36-40	351
41-45	38
46-50	4
51-55	3
56-60	0
61-65	0
66-70	0
71-75	0
76-80	0
81-85	0
86-90	0
91-95	0
96-100	0
Total	66478



Generated on March 17, 2025 at 3:23 PM

SafePace Cloud powered by Web Director®

Count by Speed Range Report

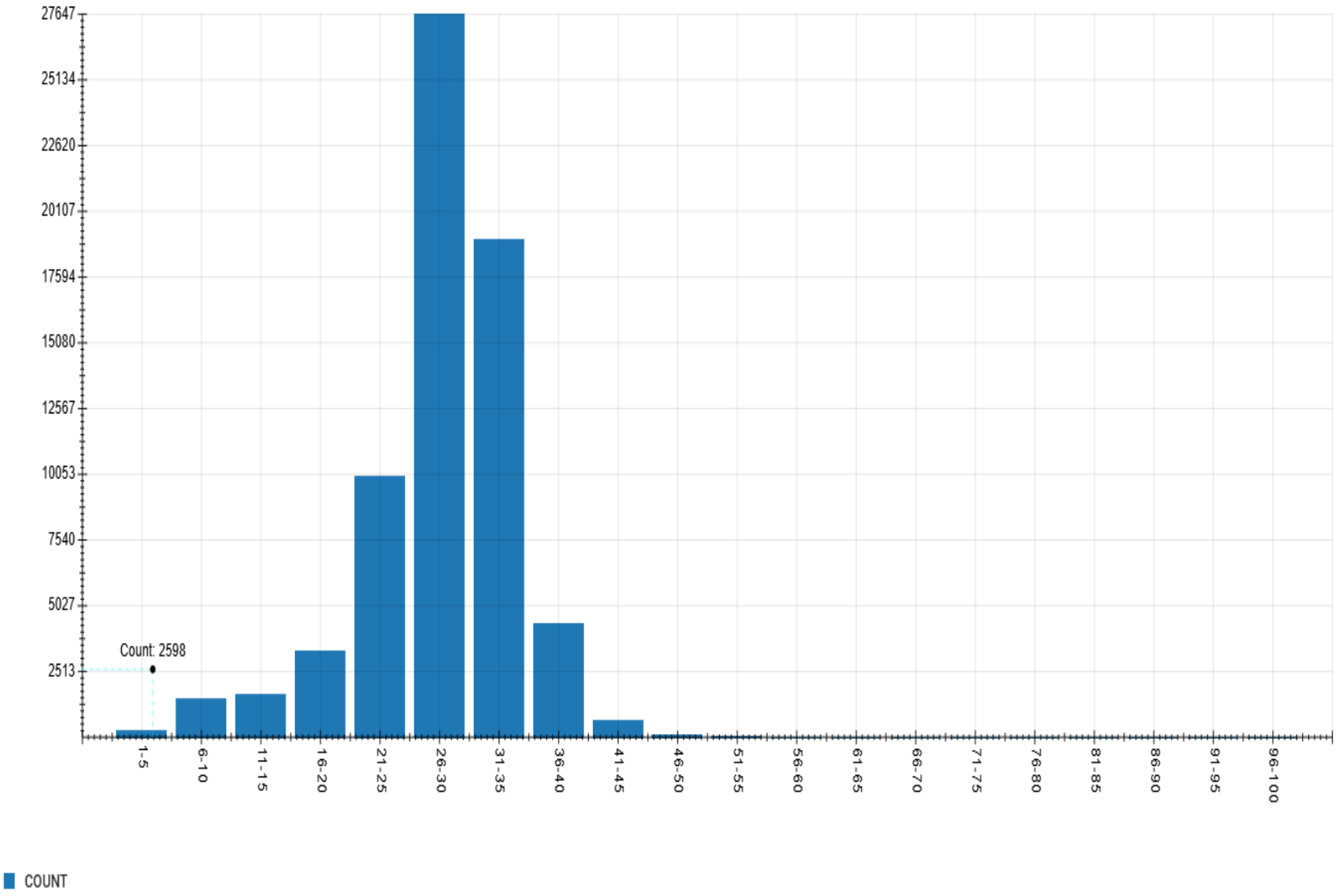
Location: Radar 2

Address: 255 Saint Andrews Blvd

Report period: 2025-02-15 to 2025-03-16

Count By Speed Range

Speed (mph)	Count
1-5	228
6-10	1442
11-15	1606
16-20	3292
21-25	9956
26-30	27647
31-35	19022
36-40	4365
41-45	629
46-50	62
51-55	11
56-60	1
61-65	0
66-70	0
71-75	0
76-80	0
81-85	0
86-90	0
91-95	0
96-100	0
Total	68261



Generated on March 17, 2025 at 3:25 PM

SafePace Cloud powered by Web Director®

LELY MSTU LIGHTING INSPECTION			Inspection Date:	3/20/2025		
ST. ANDREWS ENTRANCE - FROM US-41						
TUBE		**A**	**B**	**C**	**D**	**E**
Sign - Enter	**1**					
Sign - Exit	**2**					
SPOT			**A**	**B**	**Notes**	
Flagpole - US	**1**					
Flagpole - FL	**2**				▪ Current outages are sequenced in **RED**.	
Flagpole - BCC	**3**					
LUMINAIRE			**A**	**B**		
Single	**1**					
Single	**2**				▪ Outages repaired in the past month are sequenced in **GRAY**.	
Single	**3**					
Single	**4**					
Single	**5**					
Single	**6**					
Single	**7**					
Single	**8**					
Single	**9**					
Single	**10**					
Single	**11**					
PEBBLE BEACH BLVD						
LUMINAIRE			**A**	**B**		
Double	**1**					
Double	**2**					
Double	**3**					
Double	**4**					
Double	**5**					
Double	**6**					
Double	**7**					
Double	**8**					
Double	**9**					
Double	**10**					
Double	**11**					
Double	**12**					
Double	**13**					
Double	**14**					
Double	**15**					
Double	**16**					
Double	**17**					
Double	**18**					
Double	**19**					
Double	**20**					
Double	**21**					
Single	**22**					
Single	**23**					

LELY MSTU LIGHTING INSPECTION			***3/20/2025***		
FOREST HILLS @ AUGUSTA					
'*LELY*' SIGN		O	**A**	**B**	1909
Solar Light	--				**Notes**
DORAL CIRCLE					
TUBES		O	**A**	**B**	
Sign - Enter	**1**	O			
Sign - Exit	**2**	O			
LUMINAIRE		O	**A**	**B**	
Double	**1**				
Double	**2**				
Single	**3**				
Single	**4**				
Single	**5**				
Single	**6**				

GOLF ESTATES BEAUTIFICATION MSTU

ADVISORY COMMITTEE

8300 Radio Road
Naples, FL 34104

Minutes

February 20, 2025

I. Call to Order

The meeting was called to order at 2:04 P.M. Roll call was taken, and a quorum of four was established.

II. Attendance

Committee Members: Open Seat, Chair; Kathleen Dammert, Vice Chair; Linda Jorgensen, Lisa McGarity, Dimitra Arneson
County Staff: Brian Wells, Director, PTNE Division (ZOOM); Dan Schumacher, Project Manager, PTNE Division; Rosio Garcia, Operations Analyst, PTNE Division
Contractors: Mike McGee, Landscape Architect, McGee & Associates (Excused); Armando Yzaguirre, A&M Property Maintenance; Wendy Warren, Premier Staffing
Others: Laura Mann, Resident; Michael Mann, Resident; John Clifford

III. Approval of Agenda

Ms. McGarity moved to approve the Agenda of the Lely Golf Estates Beautification MSTU Advisory Committee as presented. Second by Ms. Jorgensen. Carried unanimously 4 - 0.

IV. Approval of Minutes – January 16, 2025

Ms. McGarity moved to approve the Lely Golf Estates Beautification MSTU Advisory Committee meeting minutes of January 16, 2025, as presented.
Second by Vice Chair Dammert. Carried unanimously 4 - 0.

V. Chair's Report

Summary reports will be provided at future meetings.

VI. Contractor Reports

A. Landscape Architect's Report – McGee & Associates (M&A)

Mr. Schumacher summarized the February 6, 2025, observation report.
(The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).

Maintenance Areas

1. St. Andrews Blvd.
2. Forest Hills Blvd. & Cart Crossing
3. Valley Stream Circle
4. Pebble Beach Blvd. & Cart Crossing
5. Thorncrest, Briarcliff, and Heather Grove Lanes (cul-de-sacs)
6. Baltusrol Drive & Cart Crossing
7. Doral Circle
8. Rattlesnake Hammock Rd.

Comments

- The area of landscaping is well trimmed.
- Quotes were received from A & M Property Maintenance for plant replacements as specified in McGee & Associates Summary Report.
- Tree Scaping of Naples submitted a proposal, based on the updated tree inventory, to remove six trees, two stumps and prune palm and deciduous trees. Trimming will be scheduled for early March.
- County brown mulch will be applied upon the completion of tree pruning and installation of plant replacements.
- A decoder controller will be ordered for Zone 10 of the HydroPoint irrigation system.

B. Landscape Maintenance Report – A & M Property Maintenance (A&M)

Mr. Yzaguirre reported routine maintenance is being performed on schedule.

Ornamental Trees

- A nursery has been identified as a source for ornamental trees.
- The forty-five-gallon trees are available for delivery and installation in two to three months.
- A duckbill tree anchor system will be installed.
- Mr. McGee will be consulted to approve the nursery and view the trees prior to delivery.
- A & M will provide a quote for delivery of four ornamental trees, installed, to Mr. Schumacher.

Ms. McGarity motioned to approve the purchase and installation of four forty-five-gallon ornamental trees for the community at a cost not to exceed $5,000.00. Second by Ms. Jorgensen. Carried unanimously 4 – 0.

VII. Project Manager's Report – Dan Schumacher

Mr. Schumacher reported:

A. Budget Report

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Lely Golf Estates MSTU Fund 1620 Budget for February 20, 2025, prepared February 11, 2025.

- Purchase Orders
  1. A & M Property Maintenance (A&M)
     - Incidentals are for landscape refurbishment and miscellaneous.
     - Grounds Maintenance is for regularly scheduled tasks and irrigation repairs.
  2. Collier County PUD – Water
  3. FPL – Electricity
  4. Howard Fertilizer & Chemical Co.- Fertilizer
  5. McGee & Associates – Landscape Architecture
  6. Premier Staffing – Transcription Services
  7. Sight N Sound, dba Naples Christmas Lighting – Holiday Decorations
  8. Simmonds Electrical – Electrical Maintenance and LED Fixtures
  9. SiteOne Landscape Supply – Irrigation Parts & Pumps
  10. Traffic Logix – Digital Solar Radar
  11. Tree Scaping of Naples – Tree Pruning and Removal

- Budget Summary
  a. Line 1, Revenue – Of the $432,700 millage assessed, $366,258 has been collected, leaving an outstanding balance of $66,441.
  b. Line 2, Carry Forward – Unexpended Prior Year (2024) Funds $394,545.
  c. All Revenues – Of the $827,245 budgeted, $366,258 has been collected leaving an available balance of $460,987 (the sum of lines 1 and 2) minus Expenditures.
  d. Line 21, Operating Expense – Of the $366,645 budgeted, $141,501 is committed to existing Purchase Orders and $78,539 is expended, leaving the remainder of $146,605 available within budget for additional operating expenses as needed.
  e. Line 25, County Overhead – Of the $80,000 budgeted, $9792 has been transferred, and a balance of $70,207 remains for transfer (PTNE Staff & Overhead, Property Appraiser, & Tax Collector).
  f. Line 27, Capital Projects – A balance of $230,600 remains for improvement projects.
  g. Line 29, Capital Reserves - $150,000 is reserved for catastrophic events.
  h. Line 30, All Expenses – Of the $827,245 budgeted, $141,501 is committed in existing Purchase Orders, $88,331 has been expended, leaving the remainder of $597,412 available for MSTU expenditures.

- General
  a. MSTU Tax Rate: 2.00 Mills (0.2%) is for beautification improvements and maintenance within the taxing district.
  b. The millage of 2.00 per $1,000 of Ad Valorem taxable value is reviewed annually in March or April.
  c. Tax millage collected and interest by the Lely Golf Estates Beautification MSTU may only be utilized by the MSTU and within the MSTU district boundary.

Mr. Schumacher noted:

- Uncommitted funds available within budget are eligible for transfer to other categories upon approval by the Committee.
- The A & M Property Maintenance *Incidentals* budget will exceed the plan. Funds are available to offset the shortfall.
- The Office of Budget Management will be consulted to determine if the sign light replacement project for St. Andrews Boulevard and Doral Circle will be debited from the Lighting Maintenance or Capital Projects category.
- The Doral Sign renovation project will be debited from the Capital Projects category.
- The *Asset Management Plan* report to estimate useful life of MSTU assets and corresponding expenditure projections to fund maintenance will be updated during the 2026 planning process.
- The Ad Valorem taxable value increased 5.42% for fiscal year 2025 over 2024 generating additional revenue of $68,920.

B. Lighting Inspection Report and Light Pole Replacements

(*The full report is included in the distributed Agenda meeting packet, which is accessible at the link shown at the end of these Minutes).*

Mr. Schumacher reported:

- February 6, 2025, report indicated:
  - St. Andrews Blvd: five (5) single luminaire and one (1) entry light sign outages. The US and State Flagpoles lights are also not functioning.

- Doral Circle: two (2) sign light outages.
- Simmonds Electrical indicated outages may be caused by a circuit malfunction.
- A quote for a diagnostic assessment and repair estimate will be solicited.
- All lamp poles are fitted with Lumec-brand LED replacements.

Sign Light Fixtures

Mr. Schumacher reported:

- A total of fourteen (14) LED light fixtures are required to replace existing sign lights, five (5) for each of the two monuments at St. Andrews Blvd and two (2) for each side of the two-sided sign at Doral Circle.
- Simmonds Electrical visited the site and noted the fixtures are corroded.
- Standard four (4) foot fixtures with LED linear bars or bulbs are recommended.
- Specifications will be confirmed and a *Request for Quote* (RFQ) for equipment and installation solicited.
- He will email the quote to the Committee members.

C. Radar Speed Report

Mr. Schumacher reported:

Radar Speed Sign Report

Two (2) Traffic Logix SafePace 100 speed monitoring signs are functioning on Saint Andrews Boulevard, eastbound by the Lely Presbyterian Church (*Radar 1*) and westbound at Pine Valley Circle (*Radar 2*).

Daily vehicle report statistics from January 14, 2025, to February 14, 2025:

- Radar 1 (110 St Andrews Blvd) recorded 67,908 vehicles averaging 2,264 vehicles per day. The maximum speed was fifty-one to fifty-five (51 - 55) mph.
- Radar 2 (255 Saint Andrews Blvd) recorded 69,348 vehicles for an average of 2,312 per day. The maximum speed was sixty-six to seventy (66-70) mph.
- The data indicated most vehicles were traveling between twenty-one (21) and thirty-five (35) mph. The speed limit is twenty-five (25).
- Discussions ensued noting the reduction in average speed recorded in the community.

Ms. McGarity *reported that she has a meeting scheduled with the Traffic Operations week ending March 1,2025.*

D. Applications to the Advisory Committee

Mr. Schumacher reported Dimitra Arneson's appointment to the Committee was confirmed by the Board of County Commissioners effective February 11, 2025, and an application was received from Michael E. Mann for the open seat on the Lely Golf Estates Beautification Advisory Committee.

Recommendation for Michael E. Mann

Ms. McGarity moved to recommend the Board of County Commissioners appoint Michael E. Mann to the Lely Golf Estates Beautification MSTU Advisory Committee. Second by Ms. Jorgensen. Carried unanimously 4 - 0.

Michael Mann's recommendation for appointment to the Lely Golf Estates Beautification MSTU Advisory Committee will be considered by the Board of County Commissioner's (BCC) in March 2025.

VIII. Ongoing Business

A. Traffic Signage – Transfer from Lely Civic Association to the MSTU

Mr. Schumacher reported:

Transfer of Decorative Traffic Signs from Lely Civic Association to the MSTU

- The Executive Summary and request for approval to proceed with the transfer is on the Board of County Commissioners (BCC) Consent Agenda for March 2025.
- The transfer, at no cost to the MSTU, includes:
  - Sixty-two signs on decorative poles (37street and STOP signs and twenty-five speed limit signs).
  - Fourteen signs installed by the Traffic Operations Division (on standard poles with consideration given for installation on new decorative post).
- Upon completion of the transfer a Request for Quote (RFQ) to supply and install signs, specified to withstand hurricane force winds, will be distributed to three vendors or a supplier on contract with the County.
- The sign project will be funded from the Capital Projects category.

IX. New Business

A. Projects

Mr. Schumacher will update the Committee on the status of projects for 2025 during the year.

B. Election of Officers

The item will be discussed at the March meeting.

X. Committee Member Comments

None

XI. Public Comments

John Clifford volunteered to analyze the Traffic Logix data over a one-year period to identify trends.

Mr. Schumacher took the offer under advisement and will report on the decision at a future meeting.

XII. Adjournment

There being no further business to come before the Committee, the meeting was adjourned by Mr. Schumacher at 2:56 P.M.

LELY GOLF ESTATES BEAUTIFICATION MSTU ADVISORY COMMITTEE

Kathleen Dammert

Chair

These Minutes were approved by the Committee on March 20, 2025 as presented ✓ or as amended ___.

Lely Golf Estates Beautification MSTU/CollierPTNE

NEXT MEETING: **MARCH 20, 2025 – 2:00 PM**

SOUTH REGIONAL LIBRARY
8065 LELY CULTURAL PARKWAY
NAPLES, FL 34113
239.252.7542

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

March 5, 2025

FOR IMMEDIATE RELEASE

Notice of Hybrid Remote Public Meeting
Collier County Library Advisory Board
Collier County, Florida

Wednesday, March 19, 2025
10:30 a.m.

Notice is hereby given that the **Collier County Library Advisory Board** will meet on **Wednesday, March 19,** at **10:30 a.m.** This will be a Hybrid Remote meeting and it will be held at the Headquarters Library Sugden Theater located at 2385 Orange Blossom Drive, Naples. Some of the Board Members may be appearing remotely, with staff present in person. The public may attend either remotely or in person

Individuals who would like to participate in person must complete and submit a speaker form prior to the beginning of the discussion about the item. Individuals who would like to participate remotely must complete and submit the online speaker registration form prior to the beginning of the meeting.

Individuals who would like to participate remotely, should contact Karen Tibbetts via email at Karen.Tibbetts@colliercountyfl.gov by 1:00 p.m. on March 18.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting of those boards, councils or agencies.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Catherine Cowser at (239) 252-7311.

###

COLLIER COUNTY LIBRARY ADVISORY BOARD
Wednesday, March 19, 2025, 10:30 a.m.
Headquarters Library – Hybrid Meeting
AGENDA

NOTICE: The public is welcome to attend Library Advisory Board meetings. Visitors will be asked to sign in and briefly describe the purpose of their visit. If the visitor is attending to discover more about the workings of the Library Advisory Board, s/he is welcome to stay for the duration of the meeting. If the visitor has a specific purpose, the Chair will recognize the visitor during Public Comments to speak for up to three (3) minutes. Additional time may be granted to the speaker at the discretion of the Chair. Robert's Rules of Order prevails. Silence cell phones and digital devices.

Call to order

1. Grant LAB Member(s) remote attendance *(Motion & Approval)*

Pledge of Allegiance

Approval of Minutes

Awards and Recognitions

1. Library Division Cheers for Peers Recipients February
2. County Service Awards and VIP Certificates
    i. Riham Saleeb (EB) – 20 Years
    ii. VIPs: Mackenzie Morgan (HQ); Headquarters Circulation Department

Board Reports

1. Report of Officers
2. Report of Committees

Presentations

1. Report of the Friends of the Library
2. Report of the Library Director
    i. General Operations
        a. Facilities & Projects Update
        b. Operations & Budget Update
        c. Programming
        d. County Website: Budget, Organizational Charts

Public Petitions to the Board for Future Consideration

Public Comments on General Topics Related to the Library Division

Unfinished Business

New Business

Public Comments on General Topics Related to the Library Division

Adjournment

Naples, Florida, February 19, 2025

LET IT BE KNOWN that the LIBRARY ADVISORY BOARD met on this date at 10:30 a.m. in the Vanderbilt Beach Branch Library with the following members present:

CHAIR:	Vacant – District 3
VICE-CHAIR:	Joy White – District 4
SECRETARY:	Rebeca Seitz – District 1
	Marjorie H. Gagnon – District 5
	Jennifer Ashford – District 2

ALSO PRESENT:	Catherine Cowser, Library Director
	Karen Tibbetts, Operations Support Specialist I
	Julie Blatt, Library Manager, Naples Regional Library
	Kim Spina, Library Manager, Acquisitions/Technical Services
	Denise McMahon, Library Manager, South Regional Library
	Chloe Snider, Library Manager, Headquarters Library
	Maria Mendieta, Library Specialist I, South Regional Library
	Andrew Meyers, Library Program Coordinator
	Tanya Williams, Manager, Strategic Initiatives
	Cindy Ruddy, FOL President
	Carla Grieve, Collier County Resident, Former LAB Board Member
	Lynne Nordhoff, Collier County Resident, Former LAB Board Member
	Ella Seitz, Collier County Resident

CALL TO ORDER

1) **Grant LAB Member remote attendance** *(Motion & Approval)*
   - Quorum was met for this meeting and was directed by Ms. White. No motion or approval for remote attendance was necessary.

PLEDGE OF ALLEGIANCE

APPROVAL OF MINUTES

Ms. White asked for approval of the regular meeting minutes of January 15, 2025. Mrs. Ashford moved to approve the minutes with one minor correction. Mrs. Gagnon seconded, and the motion was carried unanimously.

Ms. White asked for approval of the annual meeting minutes of January 15, 2025. Mrs. Seitz moved to approve the minutes with one minor correction. Mrs. Gagnon seconded, and the motion was carried unanimously.

Awards and Recognitions

1) **Library Division Cheers for Peers Recipients for January**
   - Copies of the January Cheers for Peers recipients were provided to LAB members.
2) **County Service Awards and VIP Certificates**
   a. Kim Spina (AD) – 10 Years
   b. Maria Mendieta (SR) – 10 Years
   c. George Sims (NR) – 5 Years
   - Mrs. Cowser read the VIP awards for the following Library staff members, who were unable to attend today's meeting.

- Bryan Watt (SR)
- John Alexander (MI)
- Patricia Weikel (HQ)

- Mrs. Cowser stated that Bryan Watt and John Alexander were recognized for the help they provided to deliver Library materials during the Library Courier's absence.
- Mrs. Cowser stated that Patricia Weikel was recognized for her exceptional performance during the month of December taking on the leadership role of the children's department at the Headquarters Library during the absence of both Librarians.
- Mrs. Cowser acknowledged Kim Spina for her 10 years of service with the Library.
- She added that Mrs. Spina was hired by Denise McMahon and started at the South Regional Library as a Children's Librarian. Mrs. Spina then became the head of the Youth Services Department at the Headquarters Library, and now is the Manager of the Technical Services Department and heads the acquisitions of Library materials.
- Mrs. Cowser acknowledged Maria Mendieta for her 10 years of service with the Library. She added that Mrs. Mendieta was also hired by Denise McMahon and works part time at the South Regional Library.
- Mrs. McMahon stated that Maria is an "artist extraordinaire" and creates beautiful displays for the holidays and annual summer reading program. She added that many patrons come to the South Regional Library for photo ops with the incredible displays that Mrs. Mendieta designs.
- Mrs. McMahon further stated that Mrs. Mendieta also helps with the children's programs due to staffing shortages.
- George Sims was unable to attend today's meeting in recognition of his five years of service.

BOARD REPORTS

1) **Report of Officers**
   - Ms. White announced that Ms. Connie Bettinger resigned on February 7 from her position as Library Advisory Board Chair, representing District 3.
   - Mrs. Cowser added that the vacancy for the District 3 seat has been posted with the County and is also being promoted on the Library's website and social media sites.
   - The County Attorney's Office vets all applications and will refer qualified candidates to the Library to review and interview.
   - The new LAB Board member will finish the term vacated by Ms. Bettinger.
   - The selected candidate will be presented to the Board of County Commissioners for review and approval.
2) **Report of Committees – None**

PRESENTATIONS

1) **Report of the Friends of the Library (FOL)**
   - Mrs. Ruddy stated that the second year of her two-year term as President of the Friends of the Library will expire in September.
   - She presented the FOL report as follows:
   - Mrs. Ruddy reported that a presentation about the Friends of the Library was well received by the 125 ladies in attendance at Pelican Bay Ladies Speaker Series on Monday, February 10. While some of them were interested in finding out how to get tickets to our sold-out events, many of them were unaware of the existence of the friends and didn't know that Collier County has 10 libraries. They know now.

- The second of the Nick Linn Lecture Series, the FOL's main fundraising series, was held at the Ritz Tiburon on Monday, 2/17/2025. The speaker was the William Kent Kreuger, who has written 19 mystery books in the Cork O'Connor series and 3 stand-alone books in the literature genre.
- A check for $100,000 for e-services was presented to Catherine Cowser.
- Two board members mentioned that they invited possible new board members to the next board meeting.
- The FOL February board meeting will be this Friday, February 21 at the Rees Room Naples Regional at 2pm.
- The next event on the agenda is the Nonfiction Series, at the Ritz Hilton, on 1/24/2025, featuring Erik Larson discussing "Demon of Unrest" about the Civil War. This is also a sold-out fundraiser.
- At least 2 board members from the FOL will attend the 50th anniversary celebration of the Marco Island Library on March 27th.

2) Report of the Library Director

a) General Operations

i. Facilities & Projects Update

- Mrs. Cowser was pleased to inform everyone that she has in writing that the parking lot project in Immokalee has been scheduled to begin this month.
- Ms. Williams added that the project is beginning on the south side near the community park and that asphalt has already begun to be broken up to be replaced.
- She stated that once completed, the crew will continue to the north side where the library, health department and David Lawrence Center buildings are located.
- Mrs. Cowser indicated that the project is scheduled to be completed by March 15.
- Mrs. Gagnon asked if the parking spaces would be enlarged.
- Ms. Williams stated that they will probably be designed at minimum code.

ii. Staffing Update

- Mrs. Cowser stated that the Library is trying to recruit new hires for some of the vacant positions.
- She stated that Jeff Sykes, the Library's Courier was recently sick and that Library Managers as well as Bryan Watt (SR) and John Alexander (MI) helped to deliver materials to other locations.
- She stated that deliveries were made to the Immokalee Library twice a week and the other locations every other day.
- Temple Dampier, Library Specialist I at the Marco Island Branch, works at the Everglades City Branch one day each week, and transports Library materials.
- Mrs. Cowser stated that the hours of operation at the Everglades City Branch recently changed to 8:00am-4:30pm (M-F), closed daily 12pm-1pm.
- Ms. Williams added that Roberta Stone is an employee of the County Tax Collector's Office, but also performs duties for the Clerk of Courts, and therefore it was decided for the hours of operation to be the same.
- Mrs. Cowser stated that a sign with the new hours will need to be ordered.

iii. Programming

- Mrs. Cowser stated that the Library will not be having the "Start Your Engines" event this year.

- Library staff are beginning to prepare for the Summer Reading Program. This committee is being led by the Headquarters Youth Services team.
- The theme for this year is "Color Our World". The Summer Reading Program will begin on June 2 and end on July 31.
- Mrs. Cowser stated that managers are selecting prizes for their locations, which are funded by the Friends of the Library.
- Ms. Blatt stated that the Library Book Sale will be held at Naples Regional during the week of spring break.
- Friends of the Library members are invited to attend the preview on March 12 from 3-6pm.
- The public is invited to attend beginning Thursday, March 13 - Saturday, March 15. Saturday will feature "bargain day" sales from 9am-1pm.
- Discussion ensued regarding the types of materials acceptable for the book sale.
- Mrs. McMahon stated that the Marco Island Library will be having a 50th Anniversary Celebration on March 27.
- Betsy Perdichizzi is a local resident who will speak on the book "The Last Paradise", which was inspirational to her.
- Mrs. Cowser added that members of the Marco Island City Council, County Commissioner LoCastro, past managers and employees are among the many invited to attend.

iv. Operations & Budget Update

- Mrs. Cowser stated that the projector in the Sugden Theater at Headquarters Library needs to be replaced.
- She indicated that State Aid funds would be used for this grant-related purchase.
- Staff are trying to find a projector that is compatible with the current sound system.
- Mrs. Cowser added that the sound system and projector at the Naples Regional Library need to be replaced as well.
- The Estates Branch Library had the carpeting in the children's and meeting rooms replaced. A wall separating children's services was removed and patrons are thrilled with the open space.
- Staff from South Regional Library helped the Estates Branch staff with preparation, cleanup and reshelving of materials during this project.
- The carpeting in the children's area at the Immokalee Branch Library will be quoted with for replacement.
- Mrs. Cowser stated that the Library will be recognizing restricted donations for FY24 quarter four and FY25 quarter one in the amount of $7,802.50. This money will be used for various programs and purposes in support of the Library.
- She added that the Friends of the Library recently donated $100,000.00 for e-services. This donation will be brought to the Board of County Commissioners for acceptance and allocation.
- She stated that Cindy Ruddy made the announcement of this donation at the Nick Linn Lecture Series, and participants were thrilled for the support.
- Mrs. Spina stated that the Library will be adding two additional resources to the Genealogy Department beginning March 1.

- Fold3™ Library Edition will provide Library patrons access to U.S. and international military records, including stories, photos, and personal documents, dating back to the American Revolutionary War. Many of the 600+ million records are exclusive to Fold3™.
- Newspapers.com Library Edition is an extensive database that will provide Library patrons with online access to 15,000+ historical newspapers, spanning a period between the early 1700s to the 2000s. With ongoing updates and new content continually being added, Newspapers.com Library Edition provides valuable historical content to genealogists, teachers, students, historians, and researchers.

- Mrs. Cowser will look into having the Friends of the Library fund these resources and/or reimburse the Library.
- Mrs. Cowser stated that the Friends of the Library are funding the Golden Gate Branch Library's homework help center. Currently eight students are receiving homework assistance twice a week.
- Mrs. Seitz asked how to access County job postings. Mr. Meyer stated that they could be accessed from the Library's website at the top of the home page under "Collier Jobs" or at the bottom of the home page under "Job Opportunities".
- Mrs. Cowser added that jobs are posted at midnight on Thursdays for either one or two weeks ending on the following Friday.

PUBLIC PETITIONS TO THE BOARD FOR FUTURE CONSIDERATION – None

PUBLIC COMMENTS ON GENERAL TOPICS RELATED TO THE LIBRARY DIVISION – None

UNFINISHED BUSINESS – None

NEW BUSINESS – None

PUBLIC COMMENTS ON GENERAL TOPICS RELATED TO THE LIBRARY DIVISION – None

ADJOURNMENT

There being no further business to come before the Library Advisory Board, the meeting was adjourned at 11:10 am. Mrs. Seitz made a motion to adjourn the meeting, seconded by Mrs. Ashford, and the motion was carried unanimously

Mrs. Cowser will update LAB members as to the format of the Library Advisory Board meeting scheduled to be held on Wednesday, March 19, 2025, at the Headquarters Library, 2385 Orange Blossom Drive, Naples, FL 34109.239.252.7311.

Approved by:

Joy White, Vice-Chair
Library Advisory Board

Parks & Recreation Advisory Board

MEETING AGENDA

Collier County Parks & Recreation

LOCATION:	**NORTH COLLIER REGIONAL PARK -ADMINISTRATION**
DATE:	Wednesday, **March 19**, 2025
ADDRESS:	15000 Livingston Road Naples, Fl
TIME:	**2:00 PM**

I. CALL TO ORDER

a) Welcome by the Director

b) Roll Call

c) Verification of Quorum

II. PLEDGE OF ALLEGIANCE AND INVOCATION

III. APPROVAL OF THE AGENDA

IV. APPROVAL OF PREVIOUS MEETING MINUTES

V. NEW BUSINESS

a) Purrs & Paddles Pickleball Tournament Alcohol Sale and Consumption – Jim RIch

b) Collier 311 Presentation – Rafaela Zapata

c) Wikiloc Outdoor Navigation GPS – Duke Vasey

d) Bayview Agreement – James Hanrahan

e) Naples Roller Hockey - Justin Lund

VI. BOARD / PUBLIC COMMENTS

VII. MANAGER UPDATES

VIII. DIRECTOR'S REPORT

IX. ADJOURNMENT

NOTE: THIS AGENDA IS SUBJECT TO CHANGE AND MAY BE MODIFIED BY THE DIRECTOR OR THE BOARD

News Releases

Collier County Parks & Recreation Advisory Board

Post Date: 03/17/2025 4:00 PM

Notice of Public Meeting
Collier County Parks & Recreation Advisory Board
Collier County, Florida

March 19, 2025
2:00 p.m.

Notice is hereby given that the **Collier County Parks & Recreation Advisory Board** will meet on **Wednesday, March 19,** at **2:00 p.m.** This meeting will be held at the North Collier Regional Park Conference Room A, 15000 Livingston Road, Naples, Florida.

About the public meeting:

Two or more members of the Board of County Commissioners may be present and participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting of that board.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call the Collier County Parks & Recreation Division at (239) 252-4000.

Return to full list >>

MINUTES OF THE MEETING OF THE
PARKS & RECREATION ADVISORY BOARD

Naples, Florida
January 15th, 2025

LET IT BE REMEMBERED, the Collier County Parks & Recreation Advisory Board, in and for the County of Collier, having conducted business herein, met on this date at 2 p.m. in Conference Room A at 2800 Horseshoe Drive, Naples, with the following members present:

CHAIRMAN: Edward "Ski" Olesky (excused)
VICE CHAIR: Joshua Fruth
Jessica Bergel
Lee Dixon (absent)
Rebecca Gibson-Laemel
Kristina Heuser
Eric Kelly
Donna Fiala (excused/alternate)

ALSO PRESENT: James Hanrahan, Interim Director, Parks & Recreation
Miguel Rojas Jr., Admin. Support Specialist II, Parks & Rec
Jaime Cook, Director, Development Review, Growth Mgt.
Mike Ossorio, Region 1 Parks Manager
Eric Short, Supervisor, Park Rangers
Randi Swinderman, Region 4 Parks Manager
Sidney Kittila, Region 2 Parks Manager
Said Gomez, Region 3 Parks Manager

Anyone who needs a verbatim record of the meeting may request a copy of the recording and PowerPoint presentations from the Collier County Parks & Recreation Department.

I. Pledge of Allegiance

II. Call To Order

A. Meeting was Called to Order at 2:00PM
An announcement was made that PARAB now fell under Growth Management.

B. Roll Call
3 Members were present,

C. Verification of Quorum
Three were in attendance and a quorum was not established at this point although later, at 2:28PM, two additional members arrives, including Eric Kelly arrived, and a quorum was established at that time.

D. An announcement was made that as a quorum was not established, nothing would be open for discussion or questioning, however there was a Speaker scheduled and out of respect for the Speaker's time, the Speaker would be allowed to present before the group but the subject matter would not be open for discussion or questioning.

A motion was made and carried that under New Business to move item C to item A to allow the Speaker to go first.

III. Approval of the Agenda

The Agenda was not approved at this time, although it would be at 2:28PM under New Business.

IV. Approval of Previous Meeting Minutes

The Previous Meeting Minutes were not approved at this time, although they would be at 2:28PM under New Business.

V. New Business

a. Bill Scumerhorn, Resident – Beach Umbrella Safety Presentation

- Mr. Scumerhorn went before lawmakers last year appealing to them to legislate and enact laws that promote Beach Umbrella Safety.
- Wind blown umbrellas account for many injuries, and even deaths, each year.
- It has been established that at this point the safest way to secure beach umbrellas from becoming wind blown was through the use of weight (75 lb.) and that some of the features that allow beach umbrellas to be drilled into the sand actually increase their lethalness.

- The legislation would prevent the importing of beach umbrella safety systems that did not meet US standards.
- The legislation would also mandate standardized safety requirements for the hospitality and beach umbrella rental industries.
- At 2:28PM two additional members arrived, including Eric Kelly, and a quorum was established.
- The county currently has only one beach umbrella concession located at Vanderbilt beach and operated by "Cabana Dan". (2:37PM)
- Mr. Scumerhorn had previously presented a scaled down version of his presentation to the County Commissioners and the City of Naples. Both entities expressed some interest although there was no formalized plan to follow up.
- Mr. Scumerhorn also is in the business of selling beach umbrella safety equipment although he assured that his intentions are protecting the public and not in promoting his business.

B.

A motion was made and carried to Approve the Agenda (2:42PM)
A motion was made and carried to approve the Previous Meeting Minutes.

- Jamie Cook – Discussed how PARAB now fell under Growth Management and some of the other entities that were part of Growth Management.
- It was suggest that all meetings going forward would be held at the Horseshoe Drive facility with the exception of the North Naples meeting in March and the February 19th meeting in Immokalee.
- It was discussed that at the Immokalee meeting that ongoing meetings in Immokalee would be put to vote due to lack of attendance.

VI. Old Business

A. Attendance - It was recommended that by the County Attorney that the commitment of Board Members be re established and that Board Members that had missed more than 50% of last year's Board Meeting should be directly contacted by phone to gauge their commitment for 2025.
  - It was pointed out that at times there was insufficient attendance to establish a quorum, preventing a vote, should one be needed.

B. Implementation of fee increase on pickle ball concession from $50 to $100.
C. Utilization of 311 regarding PARAB assements.
Motion made and carried to move 311 meeting from March to April to accommodate Board Members previously approved absence.

VII. Public Comment – No public comment,

VIII. Manager Updates

A. Region 1.

- Parking concerns and abuses at Marinas.
- Institute of process of educating prior to enforcing violations.

- Increased patrols.

B. Region 2 – Sidney K

- All park programs are in full swing and heavily utilized.
- Field closures.
- Water park closures.
- Spring Break Camp final preparations
- Early stage Summer Camp preparations.
- Facilities upkeep projects.
- Lifeguard hirings.

C. Region 3 – Siad G (3:05PM)

- CRA Meeting
- New basketball goals – greater use observed, community expressed appreciation.
- The Community Center roofing project completed.
- Restroom renovations are completed.
- Sports Complex workout equipment received.
- Ava Maria – secured parking for 9 weeks of soccer games.
- Work on parking areas for Sports Complex, Health Department and Community tentatively set to commence February 5th.
- Converting baseball and softball fields to artificial turf. The County owns the fields and schools use them. School system will be financing conversion.
- Over 2,000 toys disbursed in conjunction with Salvation Army Toy Drive – tremendous community appreciation.
- Christmas Around the World played a big part in bring happiness to community.

D. Regions 4 – Randy S (3:13PM)

- Great success of Snow Fest 4,000 People attended.
- In the process of collaborating with "Magic of Lights" sponsors to combine the two events for 2025.
- New fitness equipment received at North Collier facility.
- Repairs completed on basketball hoops. Converted to Commercial Grade from Residential Grade.
- Resurfacing of gym floor was completed.
- Updates to softball and soccer field facilities completed.
- Concessions sent out for bid.
- Sun & Fund tentative reopening by Spring Break.
- Vetrans Park pickle ball rentals increase.
- Vineyards inclement weather preparedness.
- Big Corkscrew entered an agreement with new formed Estates Softball League.
- 600 participants in "Grinchmas".
- Summer Camp registrations commences March 1st.
- Preparing HR to initiate early hiring to accommodate required training.

IX. Director's Report - n/a

X. Adjournment

Next Meeting Date: February 19th

6pm -321 N. 1st Street Immokalee, FL 34142

There being no further business for the good of the county, the meeting was adjourned by order of the chairman at 3:25 p.m.

COLLIER COUNTY
PARKS & RECREATION ADVISORY BOARD

~~Joshua Fruth~~, Acting Chairman

These minutes were approved by the board on _____, (check one) as presented, __ or as amended ___.



MINUTES OF THE MEETING OF THE PARKS & RECREATION ADVISORY BOARD

Immokalee, Florida

February 19, 2025

LET IT BE REMEMBERED, the Collier County Parks & Recreation Advisory Board, in and for the County of Collier, having conducted business herein, met on this date at 6 p.m. in REGULAR SESSION at Immokalee Community Park, 321 N. 1st Street, Immokalee, with the following members present:

CHAIRMAN: Edward "Ski" Olesky
VICE CHAIR: Joshua Fruth
Jessica Bergel
Lee Dixon
Eric Kelly
Rebecca Gibson-Laemel

ALSO PRESENT: James Hanrahan, Interim Director, Parks & Recreation
Miguel Rojas Jr., Admin. Support Specialist II, Parks & Rec
Jaime Cook, Director, Development Review, Growth Mgt.
Randi Swinderman, Region 4 Parks Manager
Said Gomez, Region 3 Parks Manager

Anyone who needs a verbatim record of the meeting may request a copy of the recording and PowerPoint presentations from the Collier County Parks & Recreation Department.

I. Call to Order

Chair Olesky called the meeting to order at 6 p.m.

a. **Welcome by the Director**

b. **Roll Call**

The roll call was taken.

c. **Verification of Quorum**

Six were in attendance

II. Pledge of Allegiance and Invocation

The board recited the Pledge of Allegiance

III. Approval of the Agenda

(No changes)

IV. Approval of Previous Meeting Minutes

Motion was made to move approval of previous minutes to the next march meeting. The motion passed unanimously

V. New Business

a. Meeting begins with a presentation about new renovations at Immokalee community Park as well all the programs they offer

- Rooms that are rented out for birthday parties and kitchen areas have been cleaned out, countertops redone, as well as cabinets.
- Restrooms inside the Immokalee Community Park have been completely renovated.
- New lighting has been added outside around the parking lot and other walking areas around the park
- New asphalt has been laid out around the concession stand, and all the walkways around the baseball fields.
- Immokalee community park is very engaged with the community with the help of programs such as family camp out, community yard sales, VPK program, and afterschool programs.
- Another program that keeps the community engaged is the summer program, registration starts MARCH 1st. During the summer program, every week the park takes kids on field trips outside of town; which has been very successful among the community

b. Immokalee High School field update

- The Collier County school system has begun to turf all the softball and baseball fields.
- The county commissioner is working with the county schools to come with an agreement where the fields will go to the schools so that turf can be added but the park will still be able to have access to use the fields
- James Hanrahan has mentioned that before the March meeting he will ask the county's attorney's office about the documents they're working about the fields; so that it will be added to next meeting's agenda.

A question from the board was asked

- Are we still looking at purchasing more areas for fields?
- James Hanrahan responded: we do have the Williams property
- Jaimie Cook: The County is still working through the process on the Williams property, which is 2,200 acres. There is a portion of that would be designated for our fields, not sure yet if that's for multipurpose, soccer, football, baseball fields, or combination of those. It is still going through the new diligence period with the environmental testing.
- The last board meeting passed an extension so that some more of those testing results could be obtained before we take a purchase agreement back to the board

VI. Old Business

a. Immokalee Sports Complex- Update

- Jamie Cook has met with the consultant that is designing the Immokalee Sports Complex and updates to include the turf fields and a new swimming pool.
- Jamie Cook: they were gonna need a variance for some items including landscaping. They are going to be moving forward with that variance request very shortly. To get back done while they finish up the other comments and some revisions to the swimming pool design.
- Jamie Cook: The variance is expected to be submitted and go through the review process starting in March, then hopefully following that's a typically a four-month process. But following that so July, August, they'll be submitting the site development plan review.

VII. Board/ Public Comments

Public speaker Marissa Ocanias (issue with Fields):

- In 31 years of living in Immokalee there has not been any new fields, there has been talks of making progress, but they don't see any progress being made. While Naples' communities get more things built, Immokalee only gets minor fixes here and there. Another big concern is that during the summer turf fields

get dangerously hot during the summer. There's also an issue with mosquitos on the field and little league and other groups is limited and running out of space.

Maria Salinas (issue with Immokalee Sports Complex):

- Waiting on the sports complex update, it was said that restrooms were going to be built, so far nothing has been built.
- Jamie Cook: So, any site plan changes all requires to go through permitting through the County, as well as the State. I met the consultant doing the project and they are getting ready to start their permitting in March. I believe the projected timeline the construction would start in December.

Lupita Vazquez Reyes (issue with Fields):

- As member of the CRA board and a member of the community, seeing how other projects are being built such as in big corkscrew; it feels like there is inequality here in Immokalee when it comes to how fast plans are being approved and construction being done.
- James Hanrahan: Before then, Parks was on the public services but we have now since moved under the growth management. Growth Management is they're in control of permits. But with my new staff, things are going to move quicker. I do wanna say that moving us from public services to growth management, I've already seen the enhanced movement and speed on how we do things.

Manny Turron (issue with Immokalee Sports Complex):

- The issue is that if construction for the Immokalee Sports complex is projected to start in December, that would put his soccer programs out of commission for 12 to 14 months; and this will affect many kids and their families.
- Jamie Cook: I will tell you that I am advocating for pushing for and told both the consultant and parks that we are doing is we're going to face this project, the fields being the first phase and the pool coming after.
- Joshua Fruth: I want to add to that this issue with growth shortage is an issue countywide
- However, unlike Naples, the only thing that kids have in Immokalee is the ball fields; what's the use of making small changes.

Amy Davenport (issue with Fields):

- Wanted to reiterate the problems the ball fields have such as no lighting, out of date concession stand and storage, and no restrooms.

Manuel Preciado

- There is nothing for the kids to do but the parks, but we see nothing done in the past 20 years, only the small details. We understand that there is new people in the Parks & Rec department but how hare things going to be different?

Lupita Vazquez Reyes

- I have a procedural question, can the board recommend something as a letter or do something to present to the Collier County board of commissioners about the needs of the people.
- Joshua Fruth: We understand all of your frustration, we'd be happy to do something like that.

VIII. Manager Updates

(none)

IX. Director's Report

Mr. Hanrahan addressed the board:

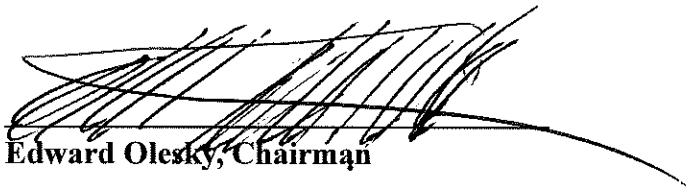
- 951 Boat ramp is closed for seawall repairs
- The Naples pier which is in the City of Naples, they are working on an agreement with the county manager to use Bayshore, when they're breaking down the pier. It would take six spots away for four to six months
- Summer Camp goes live on March 1st, online 7am and in person at 9am
- We received Kristina Heuser's email today about her resignation from the board

X. Adjournment

Next Meeting Date: March 19th
2 p.m. – North Collier Regional Park

There being no further business for the good of the County, the meeting was adjourned by order of the chairman at 7:09 p.m.

COLLIER COUNTY
PARKS & RECREATION ADVISORY BOARD



Edward Olesky, Chairman

These minutes were approved by the board on , (check one) as presented, __ or as amended ___.

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

February 26, 2025

FOR IMMEDIATE RELEASE

Notice of Public Meeting
Pelican Bay Services Division Board
Collier County, Florida

March 12, 2025
1:30 p.m.

Notice is hereby given that the **Pelican Bay Services Division Board** will meet on **March 12,** at **1:30 p.m.** in the Community Center at Pelican Bay, 8960 Hammock Oak Drive, Naples, Florida.

Individuals who would like to participate must complete and submit a speaker form prior to the beginning of the discussion about the item.

The agenda will be available on the Collier County Government website on the **PBSD webpage.**

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting of those boards, councils or agencies.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless permission for additional time is granted by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call (239) 252-1355.

###

PELICAN BAY SERVICES DIVISION
Municipal Services Taxing & Benefit Unit

NOTICE OF PUBLIC MEETING **WEDNESDAY, MARCH 12, 2025**

THE PELICAN BAY SERVICES DIVISION BOARD WILL MEET AT 1:30 PM ON MARCH 12 AT THE COMMUNITY CENTER AT PELICAN BAY, 8960 HAMMOCK OAK DRIVE, NAPLES, FLORIDA, 34108.

AGENDA

1. Pledge of Allegiance
2. Roll Call
3. Agenda approval
4. Approval of 2/12/25 Regular Session meeting minutes
5. Audience comments
6. Administrator's Report
    a. Update on the BCC Workshop on Clam Bay
    b. Review of the February 28 financials
7. Committee Reports
    a. Landscape & Safety
    b. Water Management & Clam Bay
        i. *Clam Bay dredge (TDC funding)
        ii. *2026 Beach renourishment project ($2.5 - 4 million)
        iii. *Beach dune restoration ($450,000)
8. Chairman's Report
    a. BCC approval of PBSD Board members
9. Old Business
10. New Business/Miscellaneous Correspondence
11. Adjournment

**indicates possible action items*

ANY PERSON WISHING TO SPEAK ON AN AGENDA ITEM WILL RECEIVE UP TO THREE (3) MINUTES PER ITEM TO ADDRESS THE BOARD. THE BOARD WILL SOLICIT PUBLIC COMMENTS ON SUBJECTS NOT ON THIS AGENDA AND ANY PERSON WISHING TO SPEAK WILL RECEIVE UP TO THREE (3) MINUTES. THE BOARD ENCOURAGES YOU TO SUBMIT YOUR COMMENTS IN WRITING IN ADVANCE OF THE MEETING. ANY PERSON WHO DECIDES TO APPEAL A DECISION OF THIS BOARD WILL NEED A RECORD OF THE PROCEEDING PERTAINING THERETO, AND THEREFORE MAY NEED TO ENSURE THAT A VERBATIM RECORD IS MADE, WHICH INCLUDES THE TESTIMONY AND EVIDENCE UPON WHICH THE APPEAL IS TO BE BASED. IF YOU ARE A PERSON WITH A DISABILITY WHO NEEDS AN ACCOMMODATION IN ORDER TO PARTICIPATE IN THIS MEETING YOU ARE ENTITLED TO THE PROVISION OF CERTAIN ASSISTANCE. PLEASE CONTACT THE PELICAN BAY SERVICES DIVISION AT (239) 252-1355.

PELICAN BAY SERVICES DIVISION BOARD REGULAR SESSION
FEBRUARY 12, 2025

The Pelican Bay Services Division Board met on Wednesday, February 12, 2025, at 1:30 p.m. at the Community Center at Pelican Bay, 8960 Hammock Oak Drive, Naples, Florida 34108. In attendance were:

Pelican Bay Services Division Board
Michael Fogg, Chairman
Joe Chicurel, Vice-Chairman
Jack Cullen
Jacob Damouni *(absent)*
Mark Ferland *(absent)*
Peter Griffith
Susan Hamilton
Brad Hildebrandt
Michael Rodburg
Greg Stone
Rick Swider *(absent)*
Michael Weir

Pelican Bay Services Division Staff
Neil Dorrill, Administrator
Dawn Brewer, Ops. Support Spec. II
Chad Coleman, Deputy Director
Darren Duprey, Supervisor – Field I
Dave Greenfield, Supervisor - Field II
Karin Herrmann, Project Manager I
Lisa Jacob, Project Manager II
Barbara Shea, Admin. Support Spec. II

Also Present
Tony D'Errico, Pelican Bay Foundation
Susan Levine, Pelican Bay Foundation

APPROVED AGENDA *(AS PRESENTED)*

1. Pledge of Allegiance
2. Roll Call
3. Agenda approval
4. Approval of 1/8/25 Regular Session meeting minutes
5. Audience comments
6. Administrator's Report
    a. Operations site update
    b. Review of the January 31 financials
7. Year 2 of the PBF Strategic Plan
8. Update on the Gulf Park Dr. & US 41 intersection
9. Water Management & Clam Bay Committee update
10. Chairman's Report
    a. PBSD election cycle
11. Old Business
12. New Business/Miscellaneous Correspondence
13. Adjournment

ROLL CALL

Mr. Damouni, Mr. Ferland, and Mr. Swider were absent and a quorum was established.

AGENDA APPROVAL

Ms. Hamilton motioned, Mr. Griffith seconded to approve the agenda as presented. The motion carried unanimously.

APPROVAL OF 1/8/2025 REGULAR SESSION MEETING MINUTES

Ms. Hamilton motioned, Mr. Griffith seconded to approve the 1/8/2025 regular session meeting minutes as presented. The motion carried unanimously.

AUDIENCE COMMENTS

None

ADMINISTRATOR'S REPORT

PROJECT UPDATES

Mr. Dorrill commented that a project summary was included in the agenda packet. He provided highlights of our ongoing projects as follows.

- The contractor for our Operations Facility project has completed the dry wall installation, and has partially installed the bathroom and locker room facilities. The scheduling/coordination of the relocation of an FPL transformer continues to be worked on.
- Progress has been made in the Sidewalk Improvements Phase 2 project in regards to the resolution of a substantial payment that has been in dispute with Quality Enterprises and the Clerk's Finance Dept. Staff is hopeful that as a result, QE will re-mobilize and provide a start date to address some finish issues involving two task orders. Mr. Dorrill met with Crescent Assoc. residents, just prior to this meeting, who have concerns about where the sidewalk meets their landscape berm; the participants of this meeting came to an agreement to move forward with the final work. Staff is aware of the Hotwire fiber cable which has been laid on top of an adjacent planter bed to the sidewalk, and no related issues relating to it are anticipated.
- The fieldwork for the Clam Pass bathymetric survey for a potential May dredging event has been completed. Dr. Dabees is compiling the survey information and expects to have his work completed within a week. He estimates 10-15,000 cubic yards of sand are in the system (13,500 cubic yards were removed from the system during the last dredge project). Dr. Dabees has reported that the County is doing a massive beach renourishment project in the north end of Park Shore, and unfortunately, he expects sand from that project to migrate into Clam Pass in about a year.
- Staff has completed work to reclaim and relocate sand adjacent to the rear of the two PBF beach amenities to the beach side of these buildings. Staff is exploring the possibility of a potential change order for the Park Shore project to address exposed mangrove roots and trunks in the nearshore beach (which are swimming hazards). These mangrove roots and trunks are beyond the reach of a track hoe.

REVIEW OF THE JANUARY 31 FINANCIALS

Mr. Dorrill reviewed the Jan. 31 financial statements and discussed highlights including, (1) $13.96 million in combined cash on hand, of which $5.6 million is in our general operating fund, (2) $1.5 million in County required reserves, (3) payables include a payment for debt service to our outstanding commercial paper debt, and (4) year-to-date assessments received of $4.618 million or 86% of budget.

Mr. Fogg commented on $700,000 in "reserve for disaster relief" on the balance sheet, which has been transferred out to a designated "FEMA hurricane reimbursement" County Fund to be specifically used to fund/process 2024 hurricane expenses and identify expected future FEMA reimbursement. He noted that the PBSD is financing these expenses up front, in hopes of reimbursement, while in the past (Hurricane Irma), the County had financed the upfront expenses.

Mr. Fogg commented that in December, a debt service payment was made, although it is not noted in the Fund 3042 Commercial paper income statement. The balance of our loan is now $5.1 million.

YEAR 2 OF THE PBF STRATEGIC PLAN

Ms. Susan Levine commented on the changes adopted by the PBF to the Three Year Strategic Plan, included in the agenda packet. With year one completed, she noted that (1) accomplishments of year one have been documented, (2) the changeover to Hotwire for bulk media services has been completed, (3) a new third year FY2026-27 has been added, (4) Goal 2 for resiliency and Goal 9 for governance have been added. Ms. Levine commented that the PBSD is a critical partner in achieving these goals.

Mr. Hildebrandt commented that in a recent PBF survey, maintaining the beauty in Pelican Bay is a high priority of residents. He noted that it is important to recognize the need for a joint effort between the Strategic Planning Committee and the PBSD to achieve the goals identified in the PBF Strategic Plan; collaboration is critical.

Mr. Fogg commented that the visual appeal and ambiance of Pelican Bay involves more than landscape. It also involves entranceways, monuments, etc. Ms. Levine commented that we need to raise the level of our PBF branding, and that the PBF would welcome a PBSD board member to assist. She noted that work is ongoing on a Pelican Bay landscaping mapping master plan which would identify ownership of the "corner properties" at each intersection.

UPDATE ON THE GULF PARK DR. & US 41 INTERSECTION

Dr. Chicurel provided an update on the FDOT presentation to the PBPOA concerning the US41 & Gulf Park Dr. intersection. He noted that visuals of the intersection including possible mitigation methods were included in the agenda packet. Dr. Chicurel noted that PBSD responsibilities are limited by statute. He identified three methods of mitigating danger and increasing safety at this intersection as follows.

1. Installation of a traffic light at a cost of approximately $1.5 million. FDOT has no budget/funding for a traffic light and has no plans for a traffic signal project at this site. FDOT studies show that this intersection does warrant a traffic light and could be permitted. The PBF could explore and pursue this option. The PBSD has no plans to pursue this option.
2. Median modification on US41 with temporary delineators at a cost of approximately $30,000. FDOT has no funding or plans to open a temporary median modification project at this site. One type of this modification is called "qwick kurb." This type of median modification would require maintenance which FDOT will not fund, and require the PBSD/Collier County to maintain.
3. Permanent US41 curbed median modification at a cost of approximately $300,000. FDOT has no funding or plans for such a median modification project. However, as part of a 2027 FDOT resurfacing project on US41, FDOT might be willing to open an additional median modification project that would coincide with the planned resurfacing project, which would

need to be funded by the PBSD. Dr. Chicurel is waiting on final assurances from FDOT that this is a viable option.

Dr. Chicurel commented that during the Q&A session at the FDOT presentation, residents expressed concerns over line-of-sight issues for "northbound" drivers who are forced to make a right turn out of Pelican Bay onto US41, and then make a U-turn in order to travel back north. He noted that County Road Maintenance will address the line-of-sight median landscape issues with its contractor, and hopefully changes will be made to the median landscaping.

Dr. Chicurel noted that the next Landscape & Safety Committee meeting is scheduled for March 27 in the Community Center.

Mr. Mel Greenblatt commented that the safety issue at this intersection relates to northbound drivers, who are forced to make a right turn onto US41, and then are forced to quickly move over to the left lane in order to make a dangerous U-turn to enable them to travel back north. He suggested that under the current scenario, the 55 m.p.h. speed limit needs to be lowered. Mr. Greenblatt suggested that a traffic light at this intersection would be a better solution.

Mr. Fogg commented that this intersection has been under discussion for several years. He noted that some residents have been opposed to a traffic light at this intersection as it would increase the noise levels from vehicles stopping and starting up again. Mr. Fogg noted that PBSD responsibilities end at the boundary of Pelican Bay property and does not extend out onto US41. He suggested that this issue might be an issue for the PBF Strategic Planning Committee.

Mr. Bill McCormick questioned whether an analysis of the cause of the accidents at this intersection may be helpful in determining an appropriate course of action.

Mr. Tony D'Errico, PBF President, commented that this issue will be addressed as an "opportunity" by the PBF Strategic Planning Committee; it is not listed as a stated goal.

Mr. Stone commented that the FDOT representative has the data on the accidents at this intersection over the last five years. He also suggested that the priority for state funding of new traffic lights appears to be low.

Ms. Levine suggested that a majority of accidents at this intersection involved drivers turning into Gulf Park Dr. from US41, and suggested that lowering the speed limit on US41 would be recommended.

Mr. Dorrill commented that he has the five-year accident information, and will provide it to Ms. Levine. He noted that the leading causes of the accidents, making up 60% of the accidents, are (1) distracted driving, and (2) vehicles hitting trees.

Mr. Hildebrandt commented that it is difficult to get a speed limit change on a state road. He also noted that state law enforcement is responsible for policing US41 as it is a state road.

Mr. Stone commented that northbound vehicles have several alternatives for exiting Pelican Bay including North Pointe Dr. and Pelican Bay Blvd. North, which have traffic lights at exiting intersections.

Ms. Levine commented that she will work with Mr. D'Errico on how to obtain community input on this issue.

WATER MANAGEMENT AND CLAM BAY COMMITTEE REPORT

Mr. Rodburg provided an update on issues related to the Water Management & Clam Bay Committee including the following.

- The committee has not met since the last board meeting; the next committee meeting is scheduled for Feb. 25.

- The 2024 Clam Bay Monitoring Report, posted on our website, is recommended reading. It includes a discussion and/or analysis of the health of our mangroves and coastal scrub, sea grass acreage, water levels, archeological issues, a survey of the gopher population, exotics, condition of the navigation markers, and the conditions of and maintenance work completed on hand-dug channels within Clam Bay.
- We are waiting on a recommendation from Dr. Dabees, our coastal engineer, for the removal of excess sand in Clam Pass (under our permit) based on the recently completed bathymetric survey.
- A letter was received from the Bay Colony Community Association urging us to harden the Bay Colony drainage swale. A March meeting has been scheduled with the SFWMD to determine what mediation methods for swale improvements would be feasible. Additional engineering studies would be necessary for any remediation improvements.
- A proposal for back dune replacement plantings has been received, which is expensive. It is possible that the next sand surge may wipe out these plantings. The County has purchased $1 million of coastal plants. FGCU has helped to identify a mix of plants which would be most suitable for coastal planting. In summary, nature needs time and good flow.

Mr. Bill McCormick commented that coconut mat has been installed on the west side of the Bay Colony swale, while none has been installed on the east side. Mr. Coleman commented that we are waiting on the work to be completed on the drainage from all of the buildings to be fed to the swale; ultimately there will be coconut mat on both sides of the swale for stabilization.

OTHER BOARD MEMBER COMMENTS

Mr. Fogg commented on his recent observations on a ride-along with Mr. Coleman including (1) the large amount of sand which was deposited in the swale area by 2024 hurricanes, and (2) the loss of about 30 feet of sand in the nearshore beach bottom. Mr. Coleman commented that staff continues to work on addressing the exposed mangrove stumps in nearshore beach areas. Mr. Fogg commented that a County beach renourishment is expected in late fall. He questioned the value of installing expensive back dune plantings, which may be washed away by a future storm.

Mr. Fogg commented that the BCC workshop on Clam Bay is scheduled for March 4. Mr. Fogg or Mr. Rodburg will attend, along with Mr. Dorrill and staff.

Mr. Rodburg suggested that the Water Management & Clam Bay Committee would be best served with co-chairs; one to focus on water management issues and one to focus on Clam Bay issues.

AUDIENCE COMMENT

Mr. Hamilton Fish suggested that additional installation of grasses is needed in adjacent areas to the South Beach facility and recommended that these grasses should be fenced off to prevent damage from contact with vehicles and equipment. He noted that 2024 installed grasses are not thriving, most likely from unwanted contact with vehicles and equipment.

CHAIRMAN'S REPORT

PBSD ELECTION CYCLE

Mr. Fogg commented that at our last board meeting, it was reported that we had received five applications for our four residential board member openings. Since then, one applicant withdrew his name from consideration, and therefore we now have four applicants for four openings with no election required. Mr. Fogg introduced Mr. Bob Lufkin, one of the applicants, seated in the audience. He

noted that the other applicants are Ms. Cindy Polke, Dr. Joe Chicurel, and Mr. Michael Rodburg. Mr. Fogg reported that Mr. Nick Fabregas, General Manager of the Waterside Shops, has recently completed his application for the commercial opening. It is expected that all five applicants will be appointed to the board by the BCC on March 11; their terms will begin on April 1. Mr. Dorrill commented that an orientation schedule has been established at the end of the month for the new board members.

Mr. Fogg reported that the PBSD had been sharing office space with the PBF for the last four years. However, the PBF no longer needs this space (and has moved out), and as a result, Mr. Coleman is looking at either (1) other office options for PBSD staff, or (2) the potential for other County staff to move into our current vacant space. He noted that our current office space has three years left on a seven-year lease.

Mr. Fogg commented that photos of upgrades to landscaping throughout the Pelican Bay community were provided in the agenda packet. He noted that these upgrades are much appreciated. Mr. Fogg also noted that the Waterside Shops provided us with palm trees, considered excess from the Nordstrom building demolition, which have been planted around Pelican Bay.

ADDITIONAL AUDIENCE COMMENT

Mr. Jim Duffy provided an update on the progress of work completed on the Contessa's swale (which was permitted, but never completed in front of the Contessa), including (1) in order to finish the flow, the plan is to connect from the Bay Colony bridge down through the swale to an area under the Strand, (2) the Strand has budget to clean out material under the Strand, (3) within a month, a meeting will be set up with the PBSD to provide the easement, (4) permits have been provided to the SFWMD for approval, and (5) hardening of the swale will only work if there is flow from the south to the north.

Mr. Dorrill commented that a teleconference has been scheduled with Bay Colony's general counsel with the goal of finalizing the easement description and any improvements to be conveyed and accepted by the BCC for perpetual maintenance and operation.

ADJOURNMENT

The meeting was adjourned at 3:10 p.m.

_____
Michael Fogg, Chairman

Minutes approved [____] *as presented* OR [____] *as amended* ON [_____] *date*

Pelican Bay Services Division Project Tracking Summary **3/6/2025**

PBSD New Maintenance Facilities (Project 50211)
Construction is progressing. FPL is currently installing the new transformer.

Sidewalk Improvements (Project 50212)
The Contractor is currently under a "Stop Work Order". Change Order No. 2 was approved by the Board of County Commissioners on 11/12/2024. The Contractor has submitted a payment application for Change Order No. 2 and it is anticipated that work will resume upon payment.

Clam Pass
A survey was conducted during the first week of February that will be used to determine the condition of the Pass. This data will also be used to start the renewal of the U.S. Army Corps of Engineers and Florida Department of Environmental Protection Joint Coastal Permit renewal for maintenance dredging of Clam Pass.

Bay Colony Beach Dune Swale
Work continues along the Bay Colony Beach Dune Swale as a result of Helene (September 26) and Milton (October 9). To prevent washouts and erosion, the condominiums adjacent to the dune swale are working on installing pipes to drain directly into the swale that contain runoff from each building. Once this work is completed, Earth Tech Environmental will resume installation of coconut fiber, erosion control fabric and some riprap for stabilization purposes.

Pelican Bay Beach
As a result of Helene and Milton, an enormous volume of sand was pushed onshore. Earth Tech Enterprises extracted the sand from behind both North and South beach facilities to repair and grade the beach in front of these structures. Earth Tech Enterprises will return to do the same between Reference Markers 36 and 40 (the stretch between the north and south beach facilities). Following sand placement, hearty, nature-based plantings for dune restoration will begin.

PELICAN BAY
BALANCE SHEET
Feb 28, 2025
(UNAUDITED)

OLD FUND NUMBER	Operating Fund 109 1007000000	Street Lighting 778 1008000000	Pelican Bay Landscape, Safety, Lake & Beach Projects 322 3041000000	Clam Bay Capital Projects 320 3040000000	Assessment Funded Activities Total	Pelican Bay Financed Capital Projects 323 3042000000	TOTAL
ASSETS							
Cash and investments	5,279,187.86	554,213.22	6,434,298.82	277,495.24	12,545,195.14	893,962.82	13,439,157.96
Interest receivable	-	-	-	-	-	-	-
Trade receivable, net	-	-	-	-	-	-	-
ROU Lease Receivable-Current	-	-	-	-	-	-	-
Due from other Funds	-	-		-	-	-	-
Due from other governments	840.08	-	29,760.60	-	30,600.68	-	30,600.68
Total assets	5,280,027.94	554,213.22	6,464,059.42	277,495.24	12,575,795.82	893,962.82	13,469,758.64
LIABILITIES AND FUND BALANCE							
Liabilities:							
Accounts payable	86,069.69	2,076.42	828,680.17	-	916,826.28	716,034.34	1,632,860.62
Wages payable	-	-		-	-	-	-
Retainage payable	-		-	-	-	-	-
Due to other Government	-	-	-	-	-	-	-
Deferred Inflows-Leases	(0.01)	-	-	-	(0.01)	-	(0.01)
Commercial Paper Loan	-	-	5,130,000.00	-	5,130,000.00	-	5,130,000.00
Total liabilities	86,069.68	2,076.42	5,958,680.17	-	6,046,826.27	716,034.34	6,762,860.61
Fund balances:							
Fund balance	5,193,958.26	552,136.80	505,379.25	277,495.24	6,528,969.55	177,928.48	6,706,898.03
Total liabilities and fund balances	5,280,027.94	554,213.22	6,464,059.42	277,495.24	12,575,795.82	893,962.82	13,469,758.64
	-	-	-	-	-	-	-
Fund Balance at the end of the period	5,193,958.26	552,136.80	505,379.25	277,495.24		177,928.48	
Approved Project Financing Available to Draw						-	
Unspent balance of projects:							
Small projects under $200K	-	-	15,159.66	-		-	
50066-PBSD Landscape Improvement	-	-	368,110.34	-		-	
50103-PBSD Signage	-	-	258,487.23	-		-	
50126-Beach Renourishment	-	-	753,806.58	-		-	
50211-PBSD OPS BLD	-	-	2,612,745.44	-		-	
50212-PBSD PH1-SW	-	-	182,391.56	-		-	
50212-PBSD PH2-SW	-	-	-	-		159,105.30	
50272-Streetlight Improvement	-	-	301,660.21	-		-	
50307-PB Drain/Pipe Maint.	-	-	691,775.00	-		-	
51026-PBSD Lake Bank Restoration	-	-	615,346.64	-		-	
51100-Clam Bay Restoration	-	-	-	246,059.95		-	
Total unspent balance of major projects	-	-	5,799,482.66	246,059.95		159,105.30	
Budgeted reserves:							
991000-Reserve for contingencies	136,400.00	11,000.00	-	-		-	
991700-Reserve for disaster relief	-	-	-	-		-	
992090-Reserve for sinking fund	-	-	-	-		-	
993000-Reserve for capital outlay	129,100.00	28,900.00	-	-		-	
994500-Reserve for future construction and improvement	-	-	-	-		-	
998000-Reserve for cash	475,000.00	40,000.00	-	-		-	
Total budgeted reserves	701,200.00	79,900.00	-	-		-	
Budgeted commitments at the end of the period	701,200.00	79,900.00	5,799,482.66	246,059.95		159,105.30	
	4,492,758.26	472,236.80	(5,294,103.41)	31,435.29		18,823.18	

Financing Recap:	
Funding for current sidewalk program planned	6,500,000.00
Funding reserved for future capital projects	3,500,000.00
Financing Secured	10,000,000.00

This is the difference between interest earned on unspent proceeds and accrued interest paid on the borrowing.

PELICAN BAY
INCOME STATEMENT
OPERATING FUND - 1007000000
Feb 28, 2025
(UNAUDITED)

	Adopted Budget	Amended Budget	Commitments	October	November	December	January	February	Total Expenditures	Variance	% Budget Consumed
REVENUES AND CARRYFORWARD											
Special assessments	5,380,000.00	5,380,000.00	-	15,576.85	1,209,353.88	3,231,361.40	162,406.23	196,870.25	4,815,568.61	(564,431.39)	89.5%
FEMA	-	-	-	-	-	-	-	-	-	-	#DIV/0!
Interest	53,000.00	53,000.00	-	8,058.29	7,935.55	9,454.96	19,038.19	-	44,486.99	(8,513.01)	83.9%
Miscellaneous	44,500.00	44,500.00	-	-	-	-	-	-	-	(44,500.00)	0.0%
Transfers in	34,100.00	34,100.00	-	-	-	-	-	-	-	(34,100.00)	0.0%
Negative 5% of estimated revenue	(273,900.00)	(273,900.00)	-	-	-	-	-	-	-	273,900.00	
Budgeted carryforward	1,774,800.00	1,832,689.00	-	-	-	-	-	-	-	(1,832,689.00)	
Total revenues + carryforward	7,012,500.00	7,070,389.00	-	23,635.14	1,217,289.43	3,240,816.36	181,444.42	196,870.25	4,860,055.60	(2,210,333.40)	68.7%
EXPENDITURES AND RESERVES											
Personal services											
Salaries, taxes and retirement	2,203,209.00	2,203,209.00	-	32,962.08	260,383.02	171,026.83	171,378.61	182,417.68	818,168.22	1,385,040.78	37.1%
Health, dental, life insurance; Short term, lor	471,091.00	471,091.00	235,545.50	-	-	-	235,545.50	-	235,545.50	-	100.0%
Total personal services	2,674,300.00	2,674,300.00	235,545.50	32,962.08	260,383.02	171,026.83	406,924.11	182,417.68	1,053,713.72	1,385,040.78	48.2%
Operating											
182602-Lake & Stormwater Management fie	803,600.00	830,416.00	389,654.34	28,230.19	25,196.16	48,230.26	146,829.40	68,297.42	316,783.43	123,978.23	85.1%
182901-Right of way beautification field	1,780,400.00	1,811,473.00	859,916.08	59,834.73	81,708.38	147,124.92	161,284.80	98,205.10	548,157.93	403,398.99	77.7%
Total operating	2,584,000.00	2,641,889.00	1,249,570.42	88,064.92	106,904.54	195,355.18	308,114.20	166,502.52	864,941.36	527,377.22	80.0%
Capital outlay	156,500.00	146,500.00	47,450.66	-	-	-	7,434.00	1,169.99	8,603.99	90,445.35	38.3%
Transfers out	148,500.00	906,500.00	-	51,739.29	24,187.08	64,627.23	4,823.11	3,937.40	149,314.11	757,185.89	16.5%
Total expenditures	5,563,300.00	6,369,189.00	1,532,566.58	172,766.29	391,474.64	431,009.24	727,295.42	354,027.59	2,076,573.18	2,760,049.24	56.7%
Budgeted reserves											
991000-Reserve for contingencies	184,400.00	136,400.00	-	-	-	-	-	-	-	136,400.00	
991700-Reserve for disaster relief	700,000.00	-	-	-	-	-	-	-	-	-	
993000-Reserve for capital outlay	129,100.00	129,100.00	-	-	-	-	-	-	-	129,100.00	
998000-Reserve for cash	475,000.00	475,000.00	-	-	-	-	-	-	-	475,000.00	
Total reserves	1,449,200.00	701,200.00	-	-	-	-	-	-	-	740,500.00	
Total expenditures + reserves	7,012,500.00	7,070,389.00	1,532,566.58	172,766.29	391,474.64	431,009.24	727,295.42	354,027.59	2,076,573.18	3,500,549.24	51.0%
EXCESS OF REVENUE OVER EXPENDITURES	-	-		(149,131.15)	825,814.79	2,809,807.12	(545,851.00)	(157,157.34)	2,783,482.42		

2,410,475.84	Carryforward as of 9/30/24
5,193,958.26	Fund Balance as of 02/28/2025
-	

PELICAN BAY
INCOME STATEMENT
STREET LIGHTING - 1008000000
Feb 28, 2025
(UNAUDITED)

	Adopted Budget	Amended Budget	Commitments	October	November	December	January	February	ar	Total Expenditures	Variance	% Budget Consumed
REVENUES AND CARRYFORWARD												
Current Ad Valorem Taxes	879,400.00	879,400.00	-	1,586.79	213,339.29	512,738.38	27,522.03	35,760.71		790,947.20	(88,452.80)	89.9%
Miscellaneous revenue	21,100.00	21,100.00	-	-	-	-	-	0.63		0.63	(21,099.37)	0.0%
Interest	8,200.00	8,200.00	-	568.60	533.90	848.13	1,904.67	-		3,855.30	(4,344.70)	47.0%
Insurance refunds	-	-	-	-	-	-	-	-		-	-	#DIV/0!
Negative 5% of estimated revenue	(45,500.00)	(45,500.00)	-	-	-	-	-	-		-	45,500.00	
Transfers in	-	-	-	-	-	-	-	-		-	-	
Budgeted carryforward	137,000.00	137,000.00	-	-	-	-	-	-		-	(137,000.00)	
Total revenues + carryforward	1,000,200.00	1,000,200.00	-	2,155.39	213,873.19	513,586.51	29,426.70	35,761.34		794,803.13	(205,396.87)	79.5%
EXPENDITURES AND RESERVES												
Personal services												
Salaries, taxes and retirement	119,210.00	119,210.00	-	1,822.67	13,825.02	8,790.80	9,012.70	9,012.64		42,463.83	76,746.17	35.6%
Health, dental, life insurance; Short term, long term disability; W	18,390.00	18,390.00	9,195.00	-	-	-	9,195.00	-		9,195.00	-	100.0%
Total operating	137,600.00	137,600.00	9,195.00	1,822.67	13,825.02	8,790.80	18,207.70	9,012.64		51,658.83	76,746.17	44.2%
Operating												
182701-Street Lighting Field Operations	235,000.00	235,000.00	95,098.28	18,327.34	15,995.03	11,408.40	21,959.16	15,053.74		82,743.67	57,158.05	75.7%
Total operating	235,000.00	235,000.00	95,098.28	18,327.34	15,995.03	11,408.40	21,959.16	15,053.74		82,743.67	57,158.05	75.7%
Capital outlay	500.00	500.00	-	-	-	-	-	-		-	500.00	0.0%
Transfers out	547,200.00	547,200.00	-	47.60	4,293.77	272,704.77	550.44	715.22		278,311.80	268,888.20	50.9%
Total expenditures	920,300.00	920,300.00	104,293.28	20,197.61	34,113.82	292,903.97	40,717.30	24,781.60		412,714.30	403,292.42	56.2%
Budgeted reserves												
991000-Reserve for Contingencies	11,000.00	11,000.00	-	-	-	-	-	-		-	11,000.00	
993000-Reserve for capital outlay	28,900.00	28,900.00	-	-	-	-	-	-		-	28,900.00	
998000-Reserve for cash	40,000.00	40,000.00	-	-	-	-	-	-		-	40,000.00	
Total reserves	79,900.00	79,900.00	-	-	-	-	-	-		-	79,900.00	
Total expenditures + reserves	1,000,200.00	1,000,200.00	104,293.28	20,197.61	34,113.82	292,903.97	40,717.30	24,781.60		412,714.30	483,192.42	51.7%
EXCESS OF REVENUE OVER EXPENDITURES	-	-		(18,042.22)	179,759.37	220,682.54	(11,290.60)	10,979.74		382,088.83		

170,047.97	Carryforward as of 9/30/24
552,136.80	Fund Balance as of 02/28/2025
-	

PELICAN BAY
INCOME STATEMENT
PELICAN BAY LANDSCAPE, SAFETY, LAKE & BEACH PROJECTS - 3041000000
Feb 28, 2025
(UNAUDITED)

	Adopted Budget	Amended Budget	Commitments	October	November	December	January	February	ai	Total Expenditures	Variance	% Budget Consumed
REVENUES AND CARRYFORWARD												
Special assessments	2,057,000.00	2,057,000.00	-	5,955.74	462,391.44	1,235,497.63	62,095.35	75,272.53		1,841,212.69	(215,787.31)	89.5%
Misc Revenue	-	218,876.64	-	-	-	-	-	-		-	(218,876.64)	0.0%
Interest	40,000.00	40,000.00	-	16,560.92	15,884.60	17,402.39	23,359.41	-		73,207.32	33,207.32	183.0%
Insurance refunds	-	-	-	-	-	-	-	-		-	-	#DIV/0!
Transfers in	1,044,900.00	1,044,900.00	-	-	-	392,450.00	130,000.00	-		522,450.00	(522,450.00)	50.0%
Negative 5% of estimated revenue	(104,900.00)	(104,900.00)	-	-	-	-	-	-		-	104,900.00	
Budgeted carryforward	2,900.00	5,479,072.17	-	-	-	-	-	-		-	(5,479,072.17)	
Total revenues + carryforward	3,039,900.00	8,734,948.81	-	22,516.66	478,276.04	1,645,350.02	215,454.76	75,272.53		2,436,870.01	(6,298,078.80)	27.9%
EXPENDITURES AND RESERVES												
Projects:												
50066-PBSD Landscape Improvement	331,300.00	414,900.34	-	21,910.00	-	-	-	24,880.00		46,790.00	368,110.34	11.3%
50103-PBSD Signage	-	258,487.23	42,619.32	-		-	-	-		-	215,867.91	16.5%
50126-Beach Renourishment	500,000.00	783,711.58	2.00	28,936.00	-	-	-	969.00		29,905.00	753,804.58	3.8%
50158-PBSD Roadway Safety	-	10,959.34	5.50	-	-	-	-	-		-	10,953.84	0.1%
50178-Sidewalk Maintenance/Enhancement	-	5,040.82	1,503.32	131.25	-	-	-	709.25		840.50	2,697.00	46.5%
50211-PBSD OPS BLD	-	3,927,650.44	2,609,738.90	340,207.75	381,290.70	249,529.30	181,223.70	162,653.55		1,314,905.00	3,006.54	99.9%
50212-PBSD PH1-SW	-	712,192.21	173,516.26	119.00	604.00	491.50	528,586.15	-		529,800.65	8,875.30	98.8%
50272-Streetlight Maint.	150,000.00	301,660.21	99,271.24	-	-	-	-	-		-	202,388.97	32.9%
50307-PB Drain/Pipe Maint.	700,000.00	700,000.00	151,397.00		-	-	8,225.00	-		8,225.00	540,378.00	
51026-PBSD Lake Bank Restoration	608,600.00	615,346.64	-	-	-	-	-	-		-	615,346.64	0.0%
Total expenditures	2,289,900.00	7,729,948.81	3,078,053.54	391,304.00	381,894.70	250,020.80	718,034.85	189,211.80		1,930,466.15	2,721,429.12	25.0%
Transfers out	750,000.00	1,005,000.00	-	25,507.07	26,547.84	414,459.96	17,041.91	16,305.45		499,862.23	505,137.77	49.7%
Total expenditures	3,039,900.00	8,734,948.81	3,078,053.54	416,811.07	408,442.54	664,480.76	735,076.76	205,517.25		2,430,328.38	3,226,566.89	27.8%
Budgeted reserves												
998900-Reserve for Proj	-	-	-	-	-		-	-		-	-	
993000-Reserve for capital outlay	-	-	-	-	-	-	-	-		-	-	
992090-Reserve for sinking fund	-	-	-	-	-	-	-	-		-	-	
991700-Reserve for disaster relief	-	-	-	-	-	-	-	-		-	-	
Total reserves	-	-	-	-	-	-	-	-		-	-	#DIV/0!
Total expenditures + reserves	3,039,900.00	8,734,948.81	3,078,053.54	416,811.07	408,442.54	664,480.76	735,076.76	205,517.25		2,430,328.38	3,226,566.89	63.1%
EXCESS OF REVENUE OVER EXPENDITURES	-	-		(394,294.41)	69,833.50	980,869.26	(519,622.00)	(130,244.72)		6,541.63		

5,628,837.62	Carryforward as of 9/30/24
5,635,379.25	Fund Balance as of 02/28/2025
5,130,000.00	Commercial Paper loan

(0.00)

PELICAN BAY
INCOME STATEMENT
CLAM BAY CAPITAL PROJECT FUND - 3040000000
Feb 28, 2025
(UNAUDITED)

	Adopted Budget	Amended Budget	Commitments	October	November	December	January	February	Total Expenditures	Variance	% Budget Consumed
REVENUES AND CARRYFORWARD											
Special assessments	190,600.00	190,600.00	-	551.89	42,847.68	114,487.86	5,754.09	6,975.15	170,616.67	(19,983.33)	89.5%
Interest	200.00	200.00	-	573.06	566.67	591.91	1,000.63	-	2,732.27	2,532.27	1366.1%
Transfer In	-	-	-	-	-	-	-	-	-	-	#DIV/0!
Negative 5% of estimated revenue	(9,600.00)	(9,600.00)	-	-	-	-	-	-	-	9,600.00	0.0%
Budgeted carryforward	22,500.00	130,421.95	-	-	-	-	-	-	-	(130,421.95)	
Total revenues + carryforward	**203,700.00**	**311,621.95**	**-**	**1,124.95**	**43,414.35**	**115,079.77**	**6,754.72**	**6,975.15**	**173,348.94**	**(138,273.01)**	**55.6%**
EXPENDITURES AND RESERVES											
Projects:											
51100-Clam Bay Restoration	189,100.00	297,021.95	209,482.00	(14,967.00)	43,761.00	13,785.00	-	8,383.00	50,962.00	36,577.95	87.7%
Total operating	189,100.00	297,021.95	209,482.00	(14,967.00)	43,761.00	13,785.00	-	8,383.00	50,962.00	36,577.95	**87.7%**
Transfers out	14,600.00	14,600.00	-	894.88	856.95	2,289.74	115.08	139.50	4,296.15	10,303.85	29.4%
Total expenditures	203,700.00	311,621.95	209,482.00	(14,072.12)	44,617.95	16,074.74	115.08	8,522.50	55,258.15	46,881.80	85.0%
Budgeted reserves											
991000-Reserve for contingencies	-	-	-	-	-	-	-	-	-	-	
998000-Reserve for cash	-	-	-	-	-	-	-	-	-	-	
Total reserves	-	-		-	-	-	-	-			
Total expenditures + reserves	**203,700.00**	**311,621.95**	**209,482.00**	**(14,072.12)**	**44,617.95**	**16,074.74**	**115.08**	**8,522.50**	**55,258.15**	**46,881.80**	85.0%
EXCESS OF REVENUE OVER EXPENDITURES	-	-		15,197.07	(1,203.60)	99,005.03	6,639.64	(1,547.35)	118,090.79		

159,404.45	Carryforward as of 9/30/24
277,495.24	Fund Balance as of 02/28/2025
-	

PELICAN BAY
INCOME STATEMENT
COMMERCIAL PAPER - 3042000000
Feb 28, 2025
(UNAUDITED)

	Adopted Budget	Amended Budget	Commitments	October	November	December	January	February	Total Expenditures	Variance	% Budget Consumed
REVENUES AND CARRYFORWARD											
Loan Proceeds	-	-	-	-	-	-	-	-	-	-	#DIV/0!
Interest			-	3,087.08	3,143.43	2,491.14	2,910.91	-	11,632.56	11,632.56	#DIV/0!
Budgeted carryforward	-	601,237.89	-	-	-	-	-	-	-	(601,237.89)	0.0%
		-	-	-	-	-	-	-	-	-	#DIV/0!
			-	-	-	-	-	-	-	-	
Total revenues + carryforward	**-**	**601,237.89**	**-**	**3,087.08**	**3,143.43**	**2,491.14**	**2,910.91**	**-**	**11,632.56**	**(589,605.33)**	**1.9%**
EXPENDITURES AND RESERVES											
Projects:											
50212-Pelican Bay Sidewalk Improvements Phase 2		601,237.89	159,105.30	-	1,474.00	-	419,989.06	20,669.53	442,132.59	-	100.0%
Total Expenditure	-	601,237.89	159,105.30	-	1,474.00	-	419,989.06	20,669.53	442,132.59	-	**100.0%**
Transfers out	-	-	-	-	-	-	-	-	-	-	#DIV/0!
Total expenditures	-	601,237.89	159,105.30	-	1,474.00	-	419,989.06	20,669.53	442,132.59	-	100.0%
Budgeted reserves											
993000-Reserve for capital	-	-	-	-	-	-	-	-	-	-	
Total reserves	-	-		-	-	-	-	-			
Total expenditures + reserves	**-**	**601,237.89**	**159,105.30**	**-**	**1,474.00**	**-**	**419,989.06**	**20,669.53**	**442,132.59**	**-**	100.0%
EXCESS OF REVENUE OVER EXPENDITURES	**-**	**-**		**3,087.08**	**1,669.43**	**2,491.14**	**(417,078.15)**	**(20,669.53)**	**(430,500.03)**		

608,428.51 Carryforward as of 9/30/24
177,928.48 Fund Balance as of 02/28/2025
-

Barbara Shea

Subject: FW: Re:

From: Michael Rodburg <mrodburg@gmail.com>
Sent: Monday, March 3, 2025 4:32 PM
To: Ken Sidman <kensidman@gmail.com>
Cc: Chad Coleman <Chad.Coleman@colliercountyfl.gov>
Subject: Re:

Good afternoon, Mr. Sidman,

I am the chair of the Clam Bay and Water Management Committees of the PBSD. Thank you for your thoughtful email to the Board. As you know, the PBSD staff has been working on identifying and rectifying the drainage from the Coronado. I understand the survey has been completed and staked to show Coronado's responsibility and the PBSD easement, however we still need to confirm that the easements are properly recorded. Be assured that PBSD will do its part to facilitate the safe passage of stormwater from the Coronodao within the PBSD easement, and of course, I am sure you will do whatever is necessary with respect to the flow on the Coronado property. Each property along the western "frontier" of Pelican Bay presents a somewhat different situation, so I hope you appreciate how much effort goes into these matters.

PBSD always appreciates community support and encourages inter-community communication. We need support and cooperation from the entire Pelican Bay Community. However, I do not share your view that PBSD is currently "significantly under-resourced" to meet future stormwater management demands. Are you referring to personnel levels, equipment, infrastructure improvements, maintenance, or something else? You are quite welcome to attend our next committees meeting, probably in late May, and speak to areas where you see a need for PBSD to apply greater resources.

PBSD is mindful of climate change effects. The NOAA report you reference is a generalized prediction. To aid our understanding of the impacts of sea level rise and more intense storms, PBSD gained access to a very sophisticated computer model developed by a consortium of Florida universities led by the University of Florida and Florida Gulf Coast University. This model allows for site specific evaluation of alternative storm scenarios (https://storymaps.arcgis.com/stories/aad4c97c78234b5fae02ef3b90176ead). We even had one of our staff trained on the model so that we could review extreme scenarios that could occur in the future. I am pleased to say that our water management system performs quite well in the model, far better than our neighbors north and south of us. Perhaps, if you and others are interested, we could schedule a presentation of the results of the scenarios examined to relieve concerns regarding the adequacy of our current systems to meet future conditions.

I think it is important to recognize that we have several layers of interacting protections in Pelican Bay and we minimize the impacts of major storm events by maintaining each protective layer to the best of our ability. We have the beaches, of course, and because recent hurricanes have essentially moved the beaches of southwest Florida eastward lowering the profile at the water's edge, beach renourishment and restoration of the design profile, mainly under the direction of the County, is essential as a first line of defense. Second, we have the near shore beach dune system, essentially leveled by the recent hurricanes, as a line of defense against storm and surge. We must and will restore the dunes and provide the proper coastal plantings to stabilize the dunes. Third, because so much sand was deposited beyond the line of the coastal dunes, and destroyed mangroves in the process, we are developing plans for developing a stabilized "back dune" coastal vegetation regime to protect the mangroves and, of course, the community. Third, we have the mangroves themselves, our most important line of defense. A primary mission of PBSD is maintaining the health of the mangroves through active monitoring, maintaining miles of hand dug flow channels, monitoring of tidal flows, periodic dredging of Clam Pass, and control of freshwater drainage through the berm. We have the mangroves to thank for the relatively moderate damage incurred by Ian compared to areas north and south of Pelican Bay. Fourth, we have the water management system of interconnected lakes and ponds throughout the community, some 43 of which are subject to PBSD's drainage easements. We prioritize and restore lake banks, weirs, bulk heads, etc. as and where necessary; we periodically TV the

interconnecting pipes and repair those found damaged or clean out those that have accumulated debris; we maintain the drainage swales that are within the PBSD easements, e.g. we have had to rebuild the drainage swale that accommodates Bay Colony properties as it was essentially destroyed by Helene and Milton. All of these activities, performed by dedicated staff and exceptional consultants and contractors, ensure that Pelican Bay is among the best prepared communities to weather what Mother Nature has chosen to throw at us within the last few years and is likely to throw at us in the future.

While Ian caused significant flood damage to the lower levels of many Pelican Bay properties, we are mindful of the fact that Ian made landfall as a product of its intensity and direction at a time of full moon and high tide; from a surge and flooding perspective it was statistically the 500-1000 year event. The existing water management system performed admirably in my opinion. The golf course flooded, as it is designed to do in major storm events. Water levels receded quite quickly. We have not had the situation of other communities where water simply cannot drain out when major rainfall and flood events occur. Our experts tell us that storm surge of greater intensity than Ian remains extremely unlikely despite ocean warming and rising sea levels.

While PBSD examines and maintains all areas for which it has easements and concomitant responsibility, not all of Pelican Bay is subject to PBSD. We have lakes and ponds that are private; we have private areas along the berm; we have the private and commercial properties that are responsible for their own conveyances of storm water on their properties. Partially blocked stormwater culverts and non-functioning swales to which you refer may not be within PBSD easements; if you wish to identify those areas to staff, we will address those within the PBSD easements. All this is not to say that our community should not take steps to plan for and mitigate future events. We are pleased that Fondation has taken the initiative to examine short and long term resilience, particularly hardening structures against storm effects, or relocating equipment. We monitor the work of the Corps of Engineers as they continue a multi-year examination of coastal resilience for all of southwest Florida. Similarly, we know that the HOA's continue to examine their own vulnerability and consider steps to take generally and when a storm threatens. Together as an informed community, with each doing their part, we can and will maintain Pelican Bay, its property values, and its uniqueness as a small piece of paradise for future generations.

On Fri, Feb 28, 2025 at 11:19 AM Ken Sidman <kensidman@gmail.com> wrote:

> Dear Board Members,
>
> I believe PBSD is significantly under-resourced to handle future stormwater management demands for Pelican Bay.
>
> If you agree, we need to figure out how to communicate this effectively, and get community and political support.
>
> As summarized in the NOAA technical report presented here
> https://coast.noaa.gov/elearning/video/slr/takeaways/
> within 25 years, projected sea level rise, warming of the Gulf waters, and increased rainfall will lead to
>
> - Minor flooding 10 times as often
>
> - Moderate flooding occurring more frequently than minor flooding does today
>
> - Major flooding 5 times as often
>
> While 25 years may seem way off, remember that the Pelican Bay Master Drainage Plan was created 47 years ago, in 1978. It led to the "future" we are living today. We have an obligation to preserve the value of this amazing area.
>
> With respect to the drainage plan, I believe it has become obsolete. It don't think that it anticipated the warming of the Gulf, the additional stormwater loads imposed by new residential developments east of PB, and the compromising of the drainage grade from the HOAs to the berm by hurricane flooding and vegetation.
>
> If you walk along the preserve behind the buildings on Pelican Bay Boulevard, you will encounter partially blocked stormwater culverts and non-functioning swales. We were not prepared for the recent hurricanes, and the drainage areas have not been properly maintained by the HOAs and PBSD. At a minimum, we need cooperation and communication to get this area functioning before hurricane season.
>
> The high-rises along Pelican Bay Boulevard have experienced destruction of elevators, electrical panels, and other infrastructure from Ian, Helene, and Milton. This has led to loss of use and a series of special assessments. There is very little tolerance for additional storm-related problems before "people will start voting with their feet," collapsing property values.
>
> Can we make this an agenda item for a future PBSD meeting? Maybe involving the County Commissioners?
>
> Thanks

PELICAN BAY SERVICES DIVISION BOARD REGULAR SESSION
FEBRUARY 12, 2025

The Pelican Bay Services Division Board met on Wednesday, February 12, 2025, at 1:30 p.m. at the Community Center at Pelican Bay, 8960 Hammock Oak Drive, Naples, Florida 34108. In attendance were:

Pelican Bay Services Division Board
Michael Fogg, Chairman
Joe Chicurel, Vice-Chairman
Jack Cullen
Jacob Damouni *(absent)*
Mark Ferland *(absent)*
Peter Griffith
Susan Hamilton
Brad Hildebrandt
Michael Rodburg
Greg Stone
Rick Swider *(absent)*
Michael Weir

Pelican Bay Services Division Staff
Neil Dorrill, Administrator
Dawn Brewer, Ops. Support Spec. II
Chad Coleman, Deputy Director
Darren Duprey, Supervisor – Field I
Dave Greenfield, Supervisor - Field II
Karin Herrmann, Project Manager I
Lisa Jacob, Project Manager II
Barbara Shea, Admin. Support Spec. II

Also Present
Tony D'Errico, Pelican Bay Foundation
Susan Levine, Pelican Bay Foundation

APPROVED AGENDA *(AS PRESENTED)*

1. Pledge of Allegiance
2. Roll Call
3. Agenda approval
4. Approval of 1/8/25 Regular Session meeting minutes
5. Audience comments
6. Administrator's Report
    a. Operations site update
    b. Review of the January 31 financials
7. Year 2 of the PBF Strategic Plan
8. Update on the Gulf Park Dr. & US 41 intersection
9. Water Management & Clam Bay Committee update
10. Chairman's Report
    a. PBSD election cycle
11. Old Business
12. New Business/Miscellaneous Correspondence
13. Adjournment

ROLL CALL

Mr. Damouni, Mr. Ferland, and Mr. Swider were absent and a quorum was established.

AGENDA APPROVAL

Ms. Hamilton motioned, Mr. Griffith seconded to approve the agenda as presented. The motion carried unanimously.

APPROVAL OF 1/8/2025 REGULAR SESSION MEETING MINUTES

Ms. Hamilton motioned, Mr. Griffith seconded to approve the 1/8/2025 regular session meeting minutes as presented. The motion carried unanimously.

AUDIENCE COMMENTS

None

ADMINISTRATOR'S REPORT

PROJECT UPDATES

Mr. Dorrill commented that a project summary was included in the agenda packet. He provided highlights of our ongoing projects as follows.

- The contractor for our Operations Facility project has completed the dry wall installation, and has partially installed the bathroom and locker room facilities. The scheduling/coordination of the relocation of an FPL transformer continues to be worked on.
- Progress has been made in the Sidewalk Improvements Phase 2 project in regards to the resolution of a substantial payment that has been in dispute with Quality Enterprises and the Clerk's Finance Dept. Staff is hopeful that as a result, QE will re-mobilize and provide a start date to address some finish issues involving two task orders. Mr. Dorrill met with Crescent Assoc. residents, just prior to this meeting, who have concerns about where the sidewalk meets their landscape berm; the participants of this meeting came to an agreement to move forward with the final work. Staff is aware of the Hotwire fiber cable which has been laid on top of an adjacent planter bed to the sidewalk, and no related issues relating to it are anticipated.
- The fieldwork for the Clam Pass bathymetric survey for a potential May dredging event has been completed. Dr. Dabees is compiling the survey information and expects to have his work completed within a week. He estimates 10-15,000 cubic yards of sand are in the system (13,500 cubic yards were removed from the system during the last dredge project). Dr. Dabees has reported that the County is doing a massive beach renourishment project in the north end of Park Shore, and unfortunately, he expects sand from that project to migrate into Clam Pass in about a year.
- Staff has completed work to reclaim and relocate sand adjacent to the rear of the two PBF beach amenities to the beach side of these buildings. Staff is exploring the possibility of a potential change order for the Park Shore project to address exposed mangrove roots and trunks in the nearshore beach (which are swimming hazards). These mangrove roots and trunks are beyond the reach of a track hoe.

REVIEW OF THE JANUARY 31 FINANCIALS

Mr. Dorrill reviewed the Jan. 31 financial statements and discussed highlights including, (1) $13.96 million in combined cash on hand, of which $5.6 million is in our general operating fund, (2) $1.5 million in County required reserves, (3) payables include a payment for debt service to our outstanding commercial paper debt, and (4) year-to-date assessments received of $4.618 million or 86% of budget.

Mr. Fogg commented on $700,000 in "reserve for disaster relief" on the balance sheet, which has been transferred out to a designated "FEMA hurricane reimbursement" County Fund to be specifically used to fund/process 2024 hurricane expenses and identify expected future FEMA reimbursement. He noted that the PBSD is financing these expenses up front, in hopes of reimbursement, while in the past (Hurricane Irma), the County had financed the upfront expenses.

Mr. Fogg commented that in December, a debt service payment was made, although it is not noted in the Fund 3042 Commercial paper income statement. The balance of our loan is now $5.1 million.

YEAR 2 OF THE PBF STRATEGIC PLAN

Ms. Susan Levine commented on the changes adopted by the PBF to the Three Year Strategic Plan, included in the agenda packet. With year one completed, she noted that (1) accomplishments of year one have been documented, (2) the changeover to Hotwire for bulk media services has been completed, (3) a new third year FY2026-27 has been added, (4) Goal 2 for resiliency and Goal 9 for governance have been added. Ms. Levine commented that the PBSD is a critical partner in achieving these goals.

Mr. Hildebrandt commented that in a recent PBF survey, maintaining the beauty in Pelican Bay is a high priority of residents. He noted that it is important to recognize the need for a joint effort between the Strategic Planning Committee and the PBSD to achieve the goals identified in the PBF Strategic Plan; collaboration is critical.

Mr. Fogg commented that the visual appeal and ambiance of Pelican Bay involves more than landscape. It also involves entranceways, monuments, etc. Ms. Levine commented that we need to raise the level of our PBF branding, and that the PBF would welcome a PBSD board member to assist. She noted that work is ongoing on a Pelican Bay landscaping mapping master plan which would identify ownership of the "corner properties" at each intersection.

UPDATE ON THE GULF PARK DR. & US 41 INTERSECTION

Dr. Chicurel provided an update on the FDOT presentation to the PBPOA concerning the US41 & Gulf Park Dr. intersection. He noted that visuals of the intersection including possible mitigation methods were included in the agenda packet. Dr. Chicurel noted that PBSD responsibilities are limited by statute. He identified three methods of mitigating danger and increasing safety at this intersection as follows.

1. Installation of a traffic light at a cost of approximately $1.5 million. FDOT has no budget/funding for a traffic light and has no plans for a traffic signal project at this site. FDOT studies show that this intersection does warrant a traffic light and could be permitted. The PBF could explore and pursue this option. The PBSD has no plans to pursue this option.
2. Median modification on US41 with temporary delineators at a cost of approximately $30,000. FDOT has no funding or plans to open a temporary median modification project at this site. One type of this modification is called "qwick kurb." This type of median modification would require maintenance which FDOT will not fund, and require the PBSD/Collier County to maintain.
3. Permanent US41 curbed median modification at a cost of approximately $300,000. FDOT has no funding or plans for such a median modification project. However, as part of a 2027 FDOT resurfacing project on US41, FDOT might be willing to open an additional median modification project that would coincide with the planned resurfacing project, which would

need to be funded by the PBSD. Dr. Chicurel is waiting on final assurances from FDOT that this is a viable option.

Dr. Chicurel commented that during the Q&A session at the FDOT presentation, residents expressed concerns over line-of-sight issues for "northbound" drivers who are forced to make a right turn out of Pelican Bay onto US41, and then make a U-turn in order to travel back north. He noted that County Road Maintenance will address the line-of-sight median landscape issues with its contractor, and hopefully changes will be made to the median landscaping.

Dr. Chicurel noted that the next Landscape & Safety Committee meeting is scheduled for March 27 in the Community Center.

Mr. Mel Greenblatt commented that the safety issue at this intersection relates to northbound drivers, who are forced to make a right turn onto US41, and then are forced to quickly move over to the left lane in order to make a dangerous U-turn to enable them to travel back north. He suggested that under the current scenario, the 55 m.p.h. speed limit needs to be lowered. Mr. Greenblatt suggested that a traffic light at this intersection would be a better solution.

Mr. Fogg commented that this intersection has been under discussion for several years. He noted that some residents have been opposed to a traffic light at this intersection as it would increase the noise levels from vehicles stopping and starting up again. Mr. Fogg noted that PBSD responsibilities end at the boundary of Pelican Bay property and does not extend out onto US41. He suggested that this issue might be an issue for the PBF Strategic Planning Committee.

Mr. Bill McCormick questioned whether an analysis of the cause of the accidents at this intersection may be helpful in determining an appropriate course of action.

Mr. Tony D'Errico, PBF President, commented that this issue will be addressed as an "opportunity" by the PBF Strategic Planning Committee; it is not listed as a stated goal.

Mr. Stone commented that the FDOT representative has the data on the accidents at this intersection over the last five years. He also suggested that the priority for state funding of new traffic lights appears to be low.

Ms. Levine suggested that a majority of accidents at this intersection involved drivers turning into Gulf Park Dr. from US41, and suggested that lowering the speed limit on US41 would be recommended.

Mr. Dorrill commented that he has the five-year accident information, and will provide it to Ms. Levine. He noted that the leading causes of the accidents, making up 60% of the accidents, are (1) distracted driving, and (2) vehicles hitting trees.

Mr. Hildebrandt commented that it is difficult to get a speed limit change on a state road. He also noted that state law enforcement is responsible for policing US41 as it is a state road.

Mr. Stone commented that northbound vehicles have several alternatives for exiting Pelican Bay including North Pointe Dr. and Pelican Bay Blvd. North, which have traffic lights at exiting intersections.

Ms. Levine commented that she will work with Mr. D'Errico on how to obtain community input on this issue.

WATER MANAGEMENT AND CLAM BAY COMMITTEE REPORT

Mr. Rodburg provided an update on issues related to the Water Management & Clam Bay Committee including the following.

- The committee has not met since the last board meeting; the next committee meeting is scheduled for Feb. 25.

- The 2024 Clam Bay Monitoring Report, posted on our website, is recommended reading. It includes a discussion and/or analysis of the health of our mangroves and coastal scrub, sea grass acreage, water levels, archeological issues, a survey of the gopher population, exotics, condition of the navigation markers, and the conditions of and maintenance work completed on hand-dug channels within Clam Bay.
- We are waiting on a recommendation from Dr. Dabees, our coastal engineer, for the removal of excess sand in Clam Pass (under our permit) based on the recently completed bathymetric survey.
- A letter was received from the Bay Colony Community Association urging us to harden the Bay Colony drainage swale. A March meeting has been scheduled with the SFWMD to determine what mediation methods for swale improvements would be feasible. Additional engineering studies would be necessary for any remediation improvements.
- A proposal for back dune replacement plantings has been received, which is expensive. It is possible that the next sand surge may wipe out these plantings. The County has purchased $1 million of coastal plants. FGCU has helped to identify a mix of plants which would be most suitable for coastal planting. In summary, nature needs time and good flow.

Mr. Bill McCormick commented that coconut mat has been installed on the west side of the Bay Colony swale, while none has been installed on the east side. Mr. Coleman commented that we are waiting on the work to be completed on the drainage from all of the buildings to be fed to the swale; ultimately there will be coconut mat on both sides of the swale for stabilization.

OTHER BOARD MEMBER COMMENTS

Mr. Fogg commented on his recent observations on a ride-along with Mr. Coleman including (1) the large amount of sand which was deposited in the swale area by 2024 hurricanes, and (2) the loss of about 30 feet of sand in the nearshore beach bottom. Mr. Coleman commented that staff continues to work on addressing the exposed mangrove stumps in nearshore beach areas. Mr. Fogg commented that a County beach renourishment is expected in late fall. He questioned the value of installing expensive back dune plantings, which may be washed away by a future storm.

Mr. Fogg commented that the BCC workshop on Clam Bay is scheduled for March 4. Mr. Fogg or Mr. Rodburg will attend, along with Mr. Dorrill and staff.

Mr. Rodburg suggested that the Water Management & Clam Bay Committee would be best served with co-chairs; one to focus on water management issues and one to focus on Clam Bay issues.

AUDIENCE COMMENT

Mr. Hamilton Fish suggested that additional installation of grasses is needed in adjacent areas to the South Beach facility and recommended that these grasses should be fenced off to prevent damage from contact with vehicles and equipment. He noted that 2024 installed grasses are not thriving, most likely from unwanted contact with vehicles and equipment.

CHAIRMAN'S REPORT

PBSD ELECTION CYCLE

Mr. Fogg commented that at our last board meeting, it was reported that we had received five applications for our four residential board member openings. Since then, one applicant withdrew his name from consideration, and therefore we now have four applicants for four openings with no election required. Mr. Fogg introduced Mr. Bob Lufkin, one of the applicants, seated in the audience. He

noted that the other applicants are Ms. Cindy Polke, Dr. Joe Chicurel, and Mr. Michael Rodburg. Mr. Fogg reported that Mr. Nick Fabregas, General Manager of the Waterside Shops, has recently completed his application for the commercial opening. It is expected that all five applicants will be appointed to the board by the BCC on March 11; their terms will begin on April 1. Mr. Dorrill commented that an orientation schedule has been established at the end of the month for the new board members.

Mr. Fogg reported that the PBSD had been sharing office space with the PBF for the last four years. However, the PBF no longer needs this space (and has moved out), and as a result, Mr. Coleman is looking at either (1) other office options for PBSD staff, or (2) the potential for other County staff to move into our current vacant space. He noted that our current office space has three years left on a seven-year lease.

Mr. Fogg commented that photos of upgrades to landscaping throughout the Pelican Bay community were provided in the agenda packet. He noted that these upgrades are much appreciated. Mr. Fogg also noted that the Waterside Shops provided us with palm trees, considered excess from the Nordstrom building demolition, which have been planted around Pelican Bay.

ADDITIONAL AUDIENCE COMMENT

Mr. Jim Duffy provided an update on the progress of work completed on the Contessa's swale (which was permitted, but never completed in front of the Contessa), including (1) in order to finish the flow, the plan is to connect from the Bay Colony bridge down through the swale to an area under the Strand, (2) the Strand has budget to clean out material under the Strand, (3) within a month, a meeting will be set up with the PBSD to provide the easement, (4) permits have been provided to the SFWMD for approval, and (5) hardening of the swale will only work if there is flow from the south to the north.

Mr. Dorrill commented that a teleconference has been scheduled with Bay Colony's general counsel with the goal of finalizing the easement description and any improvements to be conveyed and accepted by the BCC for perpetual maintenance and operation.

ADJOURNMENT

The meeting was adjourned at 3:10 p.m.

Michael Fogg, Chairman

Minutes approved [V] *as presented* OR [___] *as amended* ON [3/12/25] *date*

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierGov
facebook.com/CollierGov
youtube.com/CollierGov

August 13, 2024

FOR IMMEDIATE RELEASE

Notice of Hybrid Remote Public Meeting
Public Transit Advisory Committee (PTAC)
Collier County, Florida

August 21, 2024
1:00 p.m.

Notice is hereby given that the **Public Transit Advisory Committee (PTAC)** will meet on **Wednesday, August 21,** at **1:00 p.m**. This will be a Hybrid Remote meeting and it will be held at the Collier County Museum, Lecture Hall, 3331 Tamiami Trail East, Naples, Florida. The public may attend either remotely or in person.

Individuals who would like to participate remotely should contact Alexander Showalter at Alexander.Showalter@colliercountyfl.gov or call (239) 252-5849 by **noon on August 20**.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

The agenda will be available on the Collier County Government website at https://www.ridecat.com/inside-cat/ptac/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Alexander Showalter at (239) 252-5849.

Public Transit Advisory Committee
Collier Area Transit
Hybrid Meeting
Collier County Museum Lecture Hall
3331 Tamiami Trail East Naples, Florida
August 21st, 2024
1:00 p.m.

Agenda Packet

1) Call to Order
2) Roll Call
3) Approval of Agenda
4) Approval of Minutes
    a. June 19, 2024 Minutes
5) Committee Action
6) Reports and Presentations
    a. Major TDP Update
    b. Marco Island Trolley Pilot
    c. Facilities Update
7) Member Comments
8) Public Comments
9) Next Meeting Date – September 18th, 2024, Collier County Museum Lecture Hall
10) Adjournment

Two or more members of the Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future BCC meeting.

Collier Area Transit operates in compliance with Federal Transit Administration, (FTA) program requirements and ensures that transit services are made available and equitably distributed and provides equal access and mobility to any person without regard to race, color, or national origin, disability, gender or age. Title VI of the *Civil Rights Act of 1964*; FTA Circular 4702.1A, "Title VI and Title VI Dependent Guidelines for Federal Transit Administration Recipients.

Anyone who required an auxiliary aid or service for effective communication, or other reasonable accommodations in order to participate in this proceeding, should contact the Collier County Facilities Management Department located at 3335 Tamiami Trail East, Naples, Florida 34112 or 239-252-8380 as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

MINUTES OF THE PUBLIC TRANSIT ADVISORY COMMITTEE MEETING

NAPLES, FLORIDA

JUNE 19, 2024

LET IT BE REMEMBERED, the Public Transit Advisory Committee in and for the County of Collier, having conducted business herein, met on this date at 1:00 P.M. in REGULAR SESSION at Collier County Museum Lecture Hall, 3331 Tamiami Trail E, Naples, Florida with the following members present:

Chair:	John DiMarco, III
Vice-Chair:	Peter Berry
	Dewey Enderle
	Sonja Lee Samek
	Benita Staadecker
	Open Seat
	Open Seat

ALSO PRESENT: Brian Wells, Director, Collier County PTNE
Omar DeLeon, Public Transit Manager, Collier County PTNE
Alexander Showalter, Senior Planner, Collier County PTNE
Keyla Castro, Operations Specialist, Collier County PTNE
Elena-Ortiz Rosado, Marketing Manager, Collier County PTNE
Jacob Stauffer, Transit Planner, MV Transportation
Nolan Begley, Fixed Route Manager, MV Transportation

1. **Call to Order**
   Chair DiMarco called the meeting to order at 1:00 P.M.

2. **Roll Call**
   Roll call was taken, and a quorum of four was established.

3. **Approval of Agenda**
   Ms. Staadecker moved to approve the Agenda as amended:
   Add: 5) Committee Action, d. 5307 & 5339 Program of Projects Update.
   Second by Vice Chair Berry. Carried unanimously 4 - 0.

4. **Approval of Minutes**
   Mr. Enderle moved to approve the minutes of the May 15, 2024; Public Transit Advisory Committee meetings as presented. Second by Vice Chair Berry. Carried unanimously 4 - 0.

Ms. Samek joined the meeting at 1:03 P.M. A quorum of five was present.

5. **Committee Action**
   a. **Endorsement of FY24 Annual Progress Report**
   Mr. Showalter presented an Executive Summary "*Fiscal Year 2024 Transit Development Plan (TDP) Annual Update"* for consideration which identifies recommendations and implementation strategies to achieve the goals and objectives of Collier Area Transit.

   He noted:
   - To receive State Block Grant Funds for system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five (5) years and an Annual Progress Report for all other years.
   - The FY2023 TDP report outlines Collier Area Transit's progress made over the past year towards achieving the goals and objectives identified in the last TDP Major Update, approved October 27, 2020, by the BCC and FDOT on December 14, 2020.
   - The TDP Annual Progress report outlines the ten-year planning document that recommends implementation strategies to achieve the goals and objectives and evaluates discrepancies in the implementations that differ with the TDP Major Update.
     <u>Strategic Plan for Mobility</u>
     - Evaluate demographics and travel behavior.
     - Assess existing travel needs.
     - Assess existing transit/mobility services.
     - Conduct Public involvement outreach.
     - Identify mobility gaps.
     - Determine transit/mobility needs and goals.
     - Develop mobility solutions.
     - Develop service implementation and funding programs.

TDP Update

- Past year's accomplishments compared to original TDP steps taken to attain Goals, Objectives and Policies.
- Analysis of any discrepancies between the plan and the implementation for the past year.
- Revisions to the Implementation Program.
- Steps taken to attain Goals, Objective, and Policies.
- Revised Transit Priorities and Financial Plan.

Accomplishments

- Past Year Service Changes – Removal of Last Loops (11,12,13,14.17) and stretching of route times for OTP increase.
- Bust Stop Improvements – 36 ADA improvements, 14 shelter installations and 2 bench installations.
- Projects of Note: Redesigned Paradise Beach Trolley; CAT Operations and Transfer Station and Immokalee Transfer Station.

Steps taken to attain Goals, Objectives, and Policies

- Install a minimum of 10 ADA-compliant, accessible bus stops per year.
- Complete Regional Service and Fares Study.
- Increase Ridership.
- Attend or host a minimum of 6 events.
- News and Media Posts regarding service update.
- Technology Upgrades.
- Maintain Vehicles.
- Annual Grant Applications.

- Funding in the Financial Section of the TDP Annual Progress Report for FY2025-2034 is for planning purposes only.
- The TDP Annual Progress Report includes utilizing the Collier Area Transit Public Participation Plan process endorsement from the Public Transit Advisory Committee and a fifteen-day public comment period.
- The public comment period commenced June 18, 2024, and expires on July 3, 2024.
- Public comments received will be included in the record communicated to the Board of County Commissioners (BCC) for final approval before transmitting to FDOT.
- The proposed final TDP will be presented to the Board of County Commissioners for consideration on July 23, 2024.
- The deadline to submit all TDP updates to the Florida Department of Transportation (FDOT) for approval is September 1, 2024.

The Committee suggested expanding the Public Participation Process venue to enhance social media and include additional news publications.

Recommendation

Vice Chair Berry motioned to approve the Collier Area Transit Fiscal Year 2024 Annual Progress Report to the Transit Development Plan. Second by Ms. Staadecker. Carried unanimously 5 – 0.

b. Membership Application

Mr. Showalter reported there are two seats available on the Public Transit Advisory Committee (PTAC). The terms are for 3-years, and an application was received from Cliff Donenfeld.

Recommendation for Cliff Donenfeld

Chair Di Marco recommended the Board of County Commissioners appoint Cliff Donenfeld to the Public Transit Advisory Committee. Second by Mr. Enderle. Carried unanimously 5 – 0.

The recommendation will be placed on the Board of County Commissioner's *Consent Agenda*.

c. Election of Officers

Mr. Showalter reported in accordance with Ordinance No. 2016-07 the Advisory Committee must elect a Chairperson and Vice Chairperson from among its members annually.

Nomination for Chair

Vice Chair Berry nominated John DiMarco for the position of Chair of the Public Transit Advisory Committee for one year, or until a successor is appointed. Second by Mr. Enderle. Nominations were closed, and no others were tendered. Carried unanimously 5 - 0.

Mr. DiMarco retained the Chair.

Nomination for Vice Chair

Chair DiMarco nominated Peter Berry for the position of Vice Chair of the Public Transit Advisory Committee for one year, or until a successor is appointed. Second by Ms. Staadecker. Nominations were closed, and no others were tendered. Carried unanimously 5 - 0.

Mr. Berry retained Vice Chair.

d. 5307 & 5339 POP Update

Mr. DeLeon presented updates to the "*Endorsement of the Federal Transit Administration (FTA)"* to the PTAC Advisory Committee of the Program of Projects for the Federal Transit Administration (FTA) Sections 5307, and 5339 grant application submittals derived from discussions with FDOT.

Section 5307 FY24

- The Public Transit Neighborhood Enhancement (PTNE) Division receives federal grant funds for the management of the Collier Area Transit (CAT) system annually.
- Collier County is located within the Bonita Springs/Naples Census Urbanized Area.
- A portion of the Section 5307 funding received is shared with Lee County.
- The total amount allocated to the Urbanized Area Formula Program is $6,844,463 of which $5,025,205 was awarded to Collier County, $176,792 to FDOT, and $1,642,466 distributed to Lee County.

- In discussions with FDOT, the FDOT split was revised to $132,084 for CAT and $44,000 to LeeTran.
- Projects proposed for the appropriated funding may include:
    1. Transit Improvement Projects include the rehabilitation of bus stops.
    2. Security and Safety enhancement by replacing Intelligent Transportation Equipment.
    3. Provision of Americans with Disabilities Act (ADA) Paratransit services.
    4. Funding for a replacement bus.
    5. Preventative maintenance.
    6. Fixed Route and Paratransit operational expenses.

Section 5339

- The program provides capital assistance for new and replacement buses, related equipment, and facilities.
- Collier County is the designated recipient for the urbanized area.
- The amount allocated to the Bonita Springs/Naples Urbanized Area for USC Section 5339 Bus and the Bus Facilities Urbanized Area Formula program would be $474,920.
- Project proposed for the funding may include the purchase of a 40-foot bus.

Financial Split Update

An update was provided on the new split of the FDOT allocated funds between CAT and LeeTran.

Recommendation

Vice Chair Berry motioned to endorse the financial split modifications between CAT and LeeTran of FDOT's allocated funds to the Collier Area Transit 5307 & 5309 FY24-25 Program of Projects Federal Grant Funds. Second by Chair DiMarco. Carried unanimously 5 – 0.

Discussions ensued regarding Paratransit service improvements between Collier and Lee Counties.

6. Reports and Presentations

None

7. Member and Staff Comments

None

8. Public Comments

None

9. Next Meeting Date

July 17, 2024 - 1:00 P.M.
Collier County Museum Lecture Hall
3331 Tamiami Trail E
Naples, FL. 34104

10. Adjournment

There being no further business for the good of the County, the meeting was adjourned by the chair at 1:34 P.M.

Public Transit Advisory Committee

_____

John DiMarco III, Chair

These minutes approved by the Board/Committee on _____,2024 as presented_____ or as amended _____.

EXECUTIVE SUMMARY
Committee Action
Item 6a
Update on Transit Development Plan (TDP) Process

Objective:

To provide an update on the Transit Development Plan (TDP) Process.

Considerations:

To receive State Block Grant Funds for transit system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five years. The TDP is a 10-year plan for transit needs, cost and revenue projections, and community transit goals, objectives, and policies. The TDP serves as Collier Area Transit's planning, development, and operational guidance document, and the major update is developed in coordination with the MPO's Long-Range Transportation Plan.

CAT Staff has been working with the Consulting Team of Stantec and MPO Staff to update the plan. The consultant has made steady progress on the update by producing the Public Involvement Plan, consistent updates to each section of the TDP, as well as identifying new peers for comparison of transit systems. CAT and the MPO Staff have been providing comments and feedback on these working documents produced so far and ask the PTAC for any further input.

Recommendation:

Review and provide feedback regarding updates to the CAT Major TDP.

Attachments:

1. TDP Mission Goals Objectives Memo
2. TDP Stakeholder Memo Analysis
3. Peer Selection Methodology
4. TDP Situational Appraisal
5. TDP Plans Policies and Programs Memo

Prepared by: _____ Date: 8/12/2024
Alexander Showalter, Planner II

Approved by: _____ Date: 08/12/2024
Brian Wells, PTNE Division Director

Date: **August 1, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: **Mission, Goals, and Objectives – for review**

The Mission, Goals, and Objectives section of the TDP provides guidance on prioritization and decision-making. While they are forward-looking, they also recognize current operational challenges, administrative constraints, and most importantly identify opportunities to improve, become more efficient, and implement effective business controls.

The working group has reviewed the mission, goals, and objectives and provided input. The following represents the updated direction.

Mission, Goals, and Objectives

The vision, mission, goals, and objectives of Collier Area Transit serve an important part of the Transit Development Plan, serving as guidance in the decision-making processes, informing construction of long-term plans, and in consideration of allocating limited resources. Individually, the vision, mission, goals, and objectives serve distinct functions in this guidance. They create an operating framework where the guidance starts with the overarching direction in the vision and mission, identified goals and specific objectives, leading to detailed individual initiatives.

In this major update of the Transit Development Plan, each goal, objective, and initiative has been reviewed and updated. These updates reflect CAT's continued development and efforts towards improving the efficiency and effectiveness of the transit services provided to the residents, visitors, and public in Collier County.

CAT's mission statement provides a direct and concise description of CAT's purpose and principal functions. At the highest level, it provides the largest view of CAT's commitment to its customers and clients, policymakers, and stakeholders. Every decision, plan, and goal reflect CAT's mission and serves to direct the everyday workings of the agency.

CAT's vision statement supports its mission with a forward-looking focus, reflecting the next five to ten years. The vision statement sets the pace and focus directing staff and resources aligning larger policy goals, preparing for emerging trends, and providing a framework for long term investments. Both the mission and vision provide a view of CAT's directives and most importantly, provide the framework for the development of recommendations in this plan. Building on the framework provided by the vision and mission, goals and objectives provide more specificity, adding measurable steps and actions necessary to achieve those goals.

Together, the mission, vision, goals, and objectives provide a necessary evaluation of CAT performance and support comparisons in peer analysis. The goals and objectives provide context for evaluation and support comparisons with similar focus.

How Goals and Objectives are Developed

CAT relies on goals and objectives to aid in the decision-making process. In order to do this, the goals and objectives must remain relative and reflect the current conditions of Collier County and align with the course set by policy makers. Goals and objectives are reviewed annually and updated as needed.

CAT Public Transit Vision

Collier Area Transit provides effective and efficient multimodal mobility services to meet the mobility needs of workers, residents, visitors, to support economic, environmental, and community benefits.

CAT Public Transit Mission

To provide safe, accessible, reliable, convenient, and courteous mobility services to our customers.

Goal 1 **Operate reliable, convenient, and cost-effective mobility services that safely and efficiently meet the mobility needs of Collier County's workers, residents, and visitors.**

Objective 1.1 **Improve efficiency, service quality, and level of service to adequately serve workers, residents, and visitors while contributing to the economic vitality of the county.**

Initiative 1.1.1 Operate east/west corridor service to provide access to jobs, education, healthcare, community services, and recreation.

Initiative 1.1.2 Operate north/south corridor service to provide alternative access to jobs, education, healthcare and community services, and recreation.

Initiative 1.1.3 Improve peak weekday service frequency to 45 minutes or better on CAT routes.

Initiative 1.1.4 Evaluate the feasibility of premium transit services within corridors where density of demand and activity warrants frequent service.

Initiative 1.1.5 Provide mobility-on-demand service in areas with lower density of demand than is productive for fixed route service and to access areas that are not able to be served by fixed route.

Objective 1.2 Provide adequate bus stop amenities at all stops according to bus stop threshold and accessibility guidelines within available fiscal capacity.

Initiative 1.2.1 Pursue funding and partnership opportunities to maintain and improve existing bus stops. Build on needs plans including the Immokalee Transportation Network which identify gaps.

Initiative 1.2.2 Install and maintain bus stop amenities in accordance with Title VI Equity Analysis, ADA compliant Passenger Amenities Program and Bus Stop Amenities Guidelines.

Initiative 1.2.3 Install a minimum of ten ADA-compliant, accessible bus stop shelters per year. Explore opportunities to use tools such as Cartegraph Overall Condition Rating as a measure.

Initiative 1.2.4 Coordinate and partner with Collier County and local governments to include sidewalks and bus stop shelters in design and construction of roadway projects and new developments.

Initiative 1.2.5 Monitor and implement the recommendations from the CAT Bus Stop ADA Assessment.

Objective 1.3 Structure transit service with a focus on providing job access for workforce and access to mobility for persons with no or limited access to a private automobile.

Initiative 1.3.1 Improve transit service for areas with high mobility needs per the transit orientation index (TOI) as identified, updating as census data becomes available.

Initiative 1.3.2 Provide efficient transit and mobility access to major employment centers, development corridors, and other significant activity centers as funding allows, coordinating with major employers.

Initiative 1.3.3 Focus transit and mobility services in areas with high employment, and with high dwelling unit densities with connections to targeted job-housing locations to serve the workforce, including Golden Gate Estates and areas located in the eastern portion of the county.

Initiative 1.3.4 Focus improved service frequency on transit routes that serve high mobility needs communities; target service frequency of hourly or better where demand and fiscal capacity allow; apply mobility on demand solutions for areas with lower population densities and where fixed-route service is not productive and cost-effective.

Objective 1.4 Create an optimized interconnected multimodal mobility network designed to fit the range of needs and conditions for the service market.

Initiative 1.4.1 Coordinate with FDOT Commuter Services to promote, enhance and expand carpool and vanpool strategies and services to connect workforce communities with employment locations within the service area; identify properties for park-and-ride in areas with high mobility demand as funding is available. Implement recommendations from the current park-and-ride study.

Initiative 1.4.2 Coordinate with the CAT Connect paratransit program to identify and target areas with high transportation disadvantaged (TD) ridership and lower density of demand and develop programs to shift TD riders to a mobility on demand for all solutions with connections to the fixed-route network.

Initiative 1.4.3 Require local governments and FDOT to provide accessible sidewalks, bus stops, and other bus stop improvements within roadway projects and all new developments.

Initiative 1.4.4 Coordinate with community improvement organizations that support investments in enhanced mobility such as: the Immokalee CRA, Bayshore Gateway Triangle CRA, Naples CRA, Opportunity Naples, Golden Gate Estates Civic, Immokalee Chamber of Commerce, and the Greater Naples Chamber of Commerce to affect improvements in mobility through increased funding participation, roadway and sidewalk improvements, new developments, to assure transit and mobility services are integral to economic development planning and decision-making.

Initiative 1.4.5 Make transit and mobility reviews a part of the development and redevelopment review and approval process within the county and cities. Require development community, as part of the development review and approval process, follow guidelines on bus stop siting and design, land use, and roadway design factors that affect transit design; and to coordinate with CAT for transit services during the development process. Include CAT as a reviewing agency within the development review and approval process. Consider adding a transit component to traffic impact studies.

Initiative 1.4.6 Develop and adopt a transit level of service (LOS) policy and guidance to provide a framework and metrics for improving, modifying, funding transit services through coordination with the Growth Management Division.

Objective 1.5 Provide coordinated transportation services between Collier and adjacent counties to support workforce commutes to major employment centers and facilitate connections to both transit networks in support of regional economic and community benefits.

Initiative 1.5.1 Identify high travel volumes between Collier and adjacent counties; develop regional services for travel markets that have high transit propensity and support regional community and economic benefits, including Immokalee and East Naples communities, key destinations in Lee County including SW Florida Regional Airport (RSW) and VA facilities.

Initiative 1.5.2 Coordinate with LeeTran and FDOT to identify funding for expanding cross-county public transportation services.

Objective 1.6 Enhance transit services targeted at tourists, seasonal residents, and the workforce that supports this market.

Initiative 1.6.1 Broadcast CAT television commercials, radio advertisements, digital advertisements, and social media advertising, monitor ridership in relation to marketing and advertising efforts to determine ridership increases attributable to marketing efforts.

Initiative 1.6.2 Develop CAT branded services and amenities within the coastal markets to better attract ridership by visitors, seasonal residents, and workers.

Objective 1.7 Enhance awareness of CAT services and accessibility to service information for riders, workers, residents, and visitors.

Initiative 1.7.1 Continue to leverage technology applications to increase and enhance awareness of CAT services and to connect riders with CAT services.

Initiative 1.7.2 Obtain professional services for a market study and development of marketing strategies and best practices to increase awareness of CAT, CAT services, CAT image, and increase market share in terms of model split ridership. This effort should leverage use of technology, social media, transitional media, branding, and develop and provide strategies to attract interest in CAT to build choice ridership and build the image of CAT as a service.

Initiative 1.7.3 Continue to partner with the Chamber of Commerce to develop and disseminate information and materials to businesses, residents, and visitors about the value of CAT services, the benefits of riding CAT, and information about how to access and use CAT services.

Initiative 1.7.4 Provide travel training for persons interested in using the CAT system. Develop a train-the-trainer program to create ambassadors for transit services.

Initiative 1.7.5 Conduct outreach activities at community events, schools, and other organizations to teach students and the public how to use CAT and the benefits of CAT services.

Initiative 1.7.6 Coordinate with County Public Information to garner relationships with local media and news outlets to keep the community aware and involved.

Goal 2 Increase the resiliency of Collier County, protecting our infrastructure and natural resources, by providing attractive and convenient mobility alternatives that will reduce adverse carbon and environmental impacts within our communities.

Objective 2.1 Provide services and programs to reduce vehicle miles traveled with Collier County.

Initiative 2.1.1 Coordinate with the Collier MPO's Bicycle and Pedestrian Advisory Committee and local non-profit and/for-profit groups to expand the use of bicycles as a commute and mobility option, including bicycle share programs.

Initiative 2.1.2 Coordinate with Collier County Driver License and Motor Vehicle Service Centers to promote CAT fixed-route services to person unable to obtain a driver's license or with an unsafe and/or inoperable vehicle.

Initiative 2.1.3 Encourage and support partnerships with stakeholders, including employers and conduct outreach at major activity centers (educational, government, healthcare, retail, residential, commercial) to provide education and awareness of CAT services and benefits, and incentives to use CAT services rather than drive.

Objective 2.2 Design mobility service to reduce environmental impacts.

Initiative 2.2.1 Transition fleet to alternative fuels vehicles.

Initiative 2.2.2 Transition to smaller cleaner vehicles and match service delivery to demand by time of day using a mobility on demand strategy where and when service area and demand characteristics warrant; this may include converting low productivity (appropriate sized) fixed-route service to mobility on demand and/or transitioning fixed route to mobility and on demand at certain times of the day.

Objective 2.3 Improve resiliency for extreme weather events and changing environment, supporting emergency preparedness and resiliency.

Initiative 2.3.1 Use electric vehicles as back-up power for emergency facilities.

Initiative 2.3.2 Explore solar powered canopies to energize the maintenance building and buses and provide shade.

Goal 3 Build meaningful partnerships that increase awareness and education of and about mobility options and increase the viability of mobility services to promote livability and enhance economic and social well-being.

Objective 3.1 Develop marketing strategies to increase awareness of CAT services and to increase ridership.

Initiative 3.1.1 Participate in local job fairs and outreach/partnerships with employers to increase knowledge about the transit system and to encourage use.

Initiative 3.1.2 Develop marketing materials and programs to demonstrate the value and role of transit as a mobility option, including benefits accruing to personal finances, access to opportunities, and reduction of regional carbon emissions.

Initiative 3.1.3 Continue CAT outreach strategies including public relations campaign, television, radio, and social media advertisements, designed to promote transit ridership along service corridors and promote sustainability, enhancing CAT visibility.

Initiative 3.1.4 Conduct an on-going program of outreach and education targeted at governments, employers, community organizations, community services, healthcare services to build and foster partnership to provide, fund, and support mobility services.

Objective 3.2 Focus intergovernmental relationships to improve and expand regional mobility.

Initiative 3.2.1 Continue to coordinate and partner with LeeTran to improve and expand cross-country mobility services to support workforce travel demand with a focus on commuter express routes, connecting workers to employment, and provide connections strategically to the transit networks in Lee and Collier counties to facilitate access to key activity centers.

Initiative 3.2.2 Coordinate with FDOT Commuter Services to enhance and expand carpool, vanpool and other strategies and services to connect workforce communities with employment locations within the region; identify properties for park-and-ride lots in areas with high mobility demand as funding is available.

Goal 4 Coordinate the development and provision of mobility services with local, regional, state planning efforts and through public and private partnerships.

Objective 4.1 Coordinate integrated land use and transportation planning efforts to incorporate transit needs into the development review and approval process.

Initiative 4.1.1 Work with Collier County to implement recommendations listed in the Collier County Transit Impact Analysis.

Initiative 4.1.2 Participate in planning and development review meetings to ensure that county and city policies support transit services and funding needs.

Initiative 4.1.3 Meet quarterly with staff from the Collier County Transportation Engineering and Planning departments to identify upcoming utilities, roadway, and/or stormwater projects, planning studies, and site developments that will affect the provision of transit services.

Initiative 4.1.4 Coordinate with Community Development to draft a Transit Element or a transit sub-element within the Transportation Element or incorporated alternative means alternative means of transportation into the Growth Management Plan through other appropriate modifications.

Goal 5 Use technologies and innovation in service deliver to improve productivity, efficiency, reliability, and cost-effectiveness of mobility services and operations.

Objective 5.1 Explore, monitor, test, and deploy technology applications to enhance mobility services, increase awareness of CAT services, and ease of access to CAT services.

Initiative 5.1.1 Improve customer information systems, including at kiosks and on the CAT website, through directly curated and through available mobile applications, to enhance availability of and access to CAT service information and trip planning, to support increased ridership.

Initiative 5.1.2 Explore and acquire cloud-based Software as a Service (SaaS) and/or Mobility as a Service (MaaS) functionalities to support mobility on demand services, directly operated and/or operated through contract or partnership, to serve the public and augment or replace ADA paratransit services where and when warranted based on costs, productivity, and service quality.

Goal 6 Monitor and improve mobility service quality and service standards.

Objective 6.1 Develop ongoing processes to measure and monitor service quality.

Initiative 6.1.1 Use a Route Monitoring System to examine fixed-route services on an annual basis and make revisions to low-performing services as needed, including transition to mobility on demand solutions where and when warranted.

Initiative 6.1.2 Conduct surveys at least every two years to obtain passenger information including user demographics, travel behavior characteristics, transfer activity, and user satisfaction.

Initiative 6.1.3 Maintain an ongoing process public involvement process to solicit and assess input through online reviewed, calls/comment cards, discussion groups, surveys, and CAT booths at community events.

Initiative 6.1.4 Maintain on ongoing process for operators to communicate transit service comments and suggestions to identify passenger needs and improve services and service performance; comments to be reviewed monthly by service planning and operations.

Initiative 6.1.5 Manage the CAT fleet of fixed-route vehicles to maintain an average fleet age per the Transit Asset Management (TAM) Plan and the FTA useful life benchmark by vehicle type.

Initiative 6.1.6 Maintain an ongoing process for operators to communicate potential vehicle maintenance problems to be logged with the preventive maintenance program to identity and invest problems early.

Goal 7 Maximize the use of all funding sources available, including through partnerships with businesses, employers, and other institutions to increase and improve access to mobility services and mobility workers, residents, visitors.

Objective 7.1 Increase and expand revenue sources.

Initiative 7.1.1 Explore opportunities for generating advertising revenue on and inside the buses.

Initiative 7.1.2 Educate the public and local decision-makers on the importance of public transportation and the need for financial support.

Initiative 7.1.3 Submit grant applications available through federal, state, local, and private sources.

Initiative 7.1.4 Annually seek to identify and obtain available alternative revenue sources for the provision of new and improved transit services.

Initiative 7.1.5 Serve on and coordinate with the Collier County Tourist Development Council (TDC) and to explore the potential for using tourist development tax revenue to expand and improve transit service for Collier County's tourist and visitors, help enhance awareness of CAT services, develop public-private partnerships to design and fund transit services that serve visitors and employees.

Initiative 7.1.6 Explore and advocate for opportunities to leverage and enhance share of funding from existing taxes and fees to be assigned to transit. Explore means to secure impact fees, development fees, and new taxes to be secured for supporting transit, maintenance, and expansion of transit services.

Initiative 7.1.7 Partner with a local non-profit organization to raise funds, underwrite costs of adopting infrastructure for the purpose of "adopting a shelter" or "adopting a rider."

Date: **August 1, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interviews 1:1- Interim Analysis

This an early summary of the stakeholder interviews conducted to date. This information will be updated as the remainder of the interviews are conducted.

Stakeholder interviews will begin with a brief introduction and explanation of the work being done on behalf of the Collier MPO and CAT. Interviewer will provide contact information and explain how the responses will be used in the Transit Development Plan. A summary of the interview is provided to the stakeholder for review prior to being finalized.

The following stakeholders have been identified for personal interviews.

Policy Makers:

- Commissioner Rick LoCastro, District 1 (scheduled)
- Commissioner Chris Hall, District 2 (declined)
- Commissioner Burt Sanders, Vice Chair, District 3 (July 8, 2024)
- Commissioner Dan Kowal, District 4 (July 2, 2024)
- Commissioners William McDaniel, District 5 (July 10, 2024)
- Council Member Linda Penniman, City of Naples (July 3, 2024)
- Councilman Berne Barton, City of Naples (July 2, 2024)
- Council Member Greg Folley, City of Marco Island (no response)
- Council Member Tony Pernos, Everglades City (no response)
- Rich Blonna, Marco Island (July 18, 2024)

Community Partners:

- Top private employers (Arthrex), NCH
- School Board, universities and education centers

Interview Questionnaire

Introduction. Collier Area Transit is updating its Transit Development Plan. This is a state requirement which requires a review of the transit agency's performance and development of goals and objectives. As a stakeholder and policymaker, your participation is greatly appreciated. (explain how responses will be used)

1. How familiar are you with transit overall? (prompts for overall sentiment towards transit)
2. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise. (asks if there are any identified issues or topics needed to be addressed)
3. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates? (specific awareness of CAT transit services)
4. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion? (captures community fit, continues previous stakeholder questions)
5. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths? (can support recommendations)
6. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism? (identify beneficiaries)
7. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit? (discusses financial options)
8. Would service expansion be considered if a municipality funded it?
9. Can you comment on the outlook for transit?

Date: **July 8, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview – Collier County Commissioner Burt Saunders (Policy Maker)

Commissioner Burt Saunders was interviewed via telephone on July 8, 2024. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Commissioner Saunders's comments.

Interview Questionnaire

10. How familiar are you with transit overall?

    Commissioner Saunders stated the Board of County Commissioners has had several meetings where CATConnect Paratransit Service was discussed. He noted there had been concerns expressed, especially by persons from blind services who experienced trouble with scheduling and routing. Commissioner Saunders stated staff had acknowledged there were opportunities to improve the delivery of services.

    Regarding Fixed Route services, Commissioner Saunders stated there is likely a need to expand services to meet growing areas of demand and growth. He noted there are people trying to access jobs at hotels and other service jobs that require a long commute. He observed most of those jobs are in areas away from where the workforce resides. He added many of those workers will rely on transit because it is significantly less expensive that driving a vehicle to those jobs.

    Commissioner Sauders referenced FDOT's Commuter Services program as another option for connecting workers with jobs. He stated Commuter Services provides vanpools and carpools which could help meet those demands. He felt this area should be further developed as part of the transit system overall. He added the County could support some of those efforts to address congestion, commuter traffic, and connecting workers with jobs.

11. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

    Commissioner Saunders commented on CAT overall, stating although he was not familiar with the operational aspect of transit, he felt they were operating well. He noted he has received communications from constituents requesting bus shelters at various locations. He expressed concern over the heat and rain which make waiting for transit difficult on riders. Commissioner Sauders added bus shelters were important to CAT operations and more are needed for persons riding transit in Collier.

12. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

    Commissioner Saunders stated he is not particularly familiar with CAT routes in the County. He stated he relies on staff to manage the program and bring forward policy issues. He added he has not ridden transit in Collier but is sufficiently aware of their operations.

13. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

    Commissioner Saunders stated CAT has a responsibility to fulfill all those roles including connecting workers with jobs, providing a service for persons without cars, and to address and reduce congestion. He felt all roles should be part of CAT's mission to address transportation needs in the County and it was not necessary to exclude one over another. He stated not one of those roles was more important than another.

    Commissioner Saunders stated it was important for CAT to provide various services to relieve congestion, especially during commute times.

14. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

    Commissioner Sauders stated he recognized CAT had several priorities. He noted more fixed route service reaching areas of new development, and adding more service during periods of heavy demand were important and should be prioritized. He added, operating efficiently and effectively were also transit priorities that should be tracked.

    He added that there was recognition that Collier County was very spread out and this could be a challenge to provided more fixed route transit service to outlying areas. He felt the demands and challenges of transit need to consider all those priorities.

15. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

    Commissioner Sauders felt all of CAT's customers were important and thought it was not necessary to differentiate between them to provide good services. He stated serving the general public included all of those customers. He noted that the cost of transportation can be very high for some people and should be considered when developing transit services.

    He added the benefits of transit extend beyond just the riders. When more people use public transit, it takes vehicles off the road addressing congestion. He noted when connecting people and jobs, both the employers and employees benefit.

    Commissioner Saunders commented on FDOT's Commuter Program as a potential solution for addressing some needs at large employers. He felt some employers such as hotels and service industry jobs require transit outside regular commute times, noting nights and weekends or very early mornings. He noted these could be better served by vanpools or similar service.

Commissioner Saunders indicated there was an opportunity to tailor transit service to a community's needs. He was hopeful this would reduce the cost of transportation for users.

16. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

    Commissioner Saunders did not object to exploring other options for funding transit. He felt there were models around the state that could be explored and studied and developed into options. He stated the State was successfully funding some transit services tied to employers that should be investigated.

17. Would service expansion be considered if a municipality funded it?

    Commissioner Sauders stated that while he did not oppose looking into funding participation agreements, he felt this could impact operations. He noted that if some transit was subsidized it could impact the entire system. He stated transit's mission is to replace vehicles on the road and connecting people with jobs and services with reasonable user fees. He stated funding transit was part of funding local government functions.

18. Can you comment on the outlook for transit?

    Commissioner Sauders commented that the current environment is focused on cost cutting and not sufficiently on operating efficiently. He stated some elected officials may be looking to eliminate programs that are not self-sustaining. He stated he would not be in favor of reducing transit, but the current climate may not be supportive of service expansion and increases.

    He encouraged CAT to align with the business community and their goals.

Date: **July 2, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview Commissioner Dan Kowal (Policy Maker)

Councilman Barton was interviewed on July 2, 2024, via Zoom. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Councilman Barton's comments.

Interview Questionnaire

19. How familiar are you with transit overall?

Commissioner Kowal stated he had no real experience using the CAT system in the 20+ years of living in Collier County. He noted however, he was familiar with transit and used it often growing up in Pittsburgh. He stated growing up transit was important to him and very valuable especially when he could not drive. He recalled transit being seamless as he traveled between towns, connecting at hubs. He felt it was convenient and a reliable form of transportation.

In Collier however, he felt the operating conditions were too varied, noting how big Collier County was and the mix of rural and urban conditions. He stated people are moving out to rural areas of the County where you are completely car dependent. He noted there are significant gaps where transit may not make sense.

Commissioner Kowal stated there were large swath of populated areas where we need to figure out how to provide resources. He stated CAT needed a targeted plan to get reach people who are very far out, so they do not have to drive everywhere. The County needs to plan for businesses that are relocating to the area to allow them to access more of the workforce. He stated CAT needs to connect centralized service areas and major employers. Commissioner Kowal expressed concern at the number of employers including Arthrex and other new companies that moving to the Ave Maria area with limited transit resources. He stated the economic growth compounded with 2 new towns and 2 more villages with over 9,000 new homes to be built in the area will result in increased demand for all services, including transit. Commissioner Kowal noted this is in addition to the 2 existing industrial parks which continue to grow. He noted, in addition the Great Wolf Lodge, Paradise Sports and a new soccer team franchise, and the numerous new hotels approved and already under construction – all will continue to put pressure on transit to address congestion and connect people, jobs, and places to live.

20. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

    Commissioner Kowal stated he had no general comments. He felt CAT was well managed.

    He noted most recently CATConnect was before the Board. He stated some Lighthouse participants were not happy and had expressed concerns about CATConnect service. He stated some were concerned the routes were inefficient, passing drop off points only to turn around. He stated staff was able to explain the automation that programs trips and address their concerns.

    He added that Lighthouse illustrates the future demand of paratransit services. They have approximately between 200 – 300 participants that require disability services and this continues to grow. He explained this creates a need to add more vehicles into service. Commissioner Kowal stated listening to the Lighthouse, he felt more could be done to help the customers understand trip information. He noted the vehicles already have a great deal of technology and he thought it could be used to provide some (audible or visual) queues for passengers to give them trip information while they are onboard.

21. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

    Commissioner Kowal stated he generally knows where CAT operates, and he sees the CAT vehicles and bus stops. He felt CAT needs to do prepare for the developing transit in high growth areas. He stated the Board recognizes the opportunity transit provides to address growth and supported giving bonus densities for developments near places where transit is.

    He noted on Marco Island, a hotel there had partnered with CAT to accommodate their staff that operated late. He stated this was a good example of an employer working with transit. He wanted to encourage staff to continue to work with employers to connect the workforce with employment opportunities. Commissioner Kowal suggested CAT survey large employers in the area to understand where their workforce is coming from use that data to create transit service that meets their needs.

    Commissioner Kowal noted tourist should also use transit. He stated the bed tax collected by the Tourist Development Council could support the demand created in service industry jobs. He felt the funding of transit should be shared across industries that create some of the demand. He expressed concern that transit funding relies too heavily on ad valorum taxes. Commissioner Kowal stated there is an opportunity with all the new hotels (including boutique hotels), manufacturing, and industry coming to Collier to be creative in funding transit.

    Commissioner Kowal noted that in his law enforcement background, he saw the opportunity to leverage growth to pursue grants. He felt transit could use grants to build relationships with the private sector to fund transit. He added grants could be used strategically to fund early needs and give programs time to fully develop. He stated a business approach to identifying funding opportunities, including grants would be needed to address growth and demand for transit.

22. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

    Commissioner Kowal stated one of transit's primary role should be connecting people with employment opportunities. He added it was important to also provide transit for life sustaining trips and needed community services. He felt this was an important to maintain the quality of life in Collier County.

23. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

    Commissioner Kowal stated those all could be priorities. However, he was aware of the need for shared bike paths, sidewalks, and shared-use paths in areas to the east of the County. He stated there are people living near Naples that bicycle to work. He added, CAT needs to understand where the daily travelers are going and support as much of that as possible. He cautioned against trying to serve all areas in Collier County, especially where there is low ridership. He noted, with limited resources you need to address areas where you can serve the highest number of people and have the greatest impact – connecting people with jobs.

24. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

    Commissioner Kowal stated he recognized there are people in Collier County who depend on public transit for life sustaining trips. He felt this was an important service. He added service industry jobs rely that rely on transit including school workers, restaurant servers, and housekeepers are important people to serve.

25. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

    Commissioner Kowal felt that diversifying how transit is funded was important. He felt connecting the demand, including with large employers, with providing the service needed to be addressed. He stated leveraging grants to offset some initial investment costs was a good business practice. He felt state and federal grants could be leveraged with public-private partnerships if they could be sustained. He felt the continued growth in the County would increase demand for transit, and that needed to be planed for.

26. Would service expansion be considered if a municipality funded it?

    He felt that this warranted more discussion because municipalities represented a relatively small segment within county. He contrasted this with most of the Collier County being unincorporated citing Immokalee as an example. He stated Immokalee would benefit from more transit than most of the incorporated cities. He recognized Immokalee does not have a large tax base that could contribute so he questioned how effective that would be. He thought it should be vetted for future consideration. He felt addressing how larger businesses that are creating demand for transit could contribute could be a better focus.

27. Can you comment on the outlook for transit?

Commissioner Kowal felt the outlook for transit included continued growth in the East and Northeast portions of the County. He felt that with this growth, transit should be preparing to address demand with transit hubs. He stated connecting new growth areas with services was important to addressing congestion.

Date: **July 10, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview Collier County Commissioner William McDaniel (Policy Maker)

Commissioner William (Bill) McDaniel was interviewed via telephone on July 10, 2024. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Commissioner McDaniel's comments.

Interview Questionnaire

28. How familiar are you with transit overall?

    Commissioner McDaniel indicated he is not too familiar with CAT operations in any detail. He knows it is an important community service. He noted there has not been a great deal of discussion about transit as in the past.

29. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

    Commissioner McDaniel stated he understood the constraints of transit operating in Collier County. He noted Collier's geography and widely disbursed population areas, lower density were challenges for transit. He compared more densely populated areas such as Miami and other large cities where the intensity of development and congestion make transit more viable.

    Commissioner McDaniel provided an example, noting a resident who needs to take several buses with long connections when traveling in from Immokalee. He felt this use of transit in this case was cumbersome and difficult for people who rely on public transit. He felt there should be better, more efficient options, especially when considering the expense. He added there is a role for transportation companies such as Uber to meet some of those needs more efficiently.

30. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

    Commissioner McDaniel stated CAT had good visibility. He noted, no operation is perfect working 100% of the time. He added they were performing as expected.

    Commissioner McDaniel stated transit met a need for persons who cannot afford a car or cannot drive for a variety of reasons. He noted, especially for persons with limited mobility, the very elderly, and persons with developmental disabilities, transit is providing an important service.

    He added overall as Collier County continues experience continued growth; he expects transit to help reduce the strain on roadways and other transportation infrastructure.

31. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

    Commissioner McDaniel felt all the above roles represented important considerations. He felt no one role should be prioritized, rather a rational business approach to meeting needs and demands should be developed and pursued. He noted each role has different needs and resources should be directed in an efficient manner.

32. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

    Commissioner McDaniel noted it was difficult to prioritize one need over another. He stated these likely all represented an area that needed to be considered when budgeting and allocating resources. He noted the operational efficiency of transit including downtime, area covered (land mass), and frequency needs to be discussed.

    He noted this question should consider the importance of regional coordination with Lee County. Speaking to church group in Immokalee, he was made aware of the need for additional connecting service between Lehigh Acres and Immokalee. He stated he would like to see an additional route connecting to Lee County where there is significantly more affordable housing. He added both communities would benefit greatly from more transportation options.

33. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

    Commissioner McDaniel commented, that just like the previous question, CAT needs to consider all customers in the development of its services. He stated while there is no one-size fits all, transit systems should have options and alternatives that serve demand with the appropriate size vehicle, service, and resources.

    Commissioner McDaniel added the state has several programs including vanpools that he felt reflected the need for different options. He stated vanpools worked directly with employers to address their needs and their workforce. He noted this is an example where the service and vehicle met the need of the customer. He commented both the rider and the employer benefited from the service.

34. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

    Commissioner McDaniel stated there was no “best” way to pay for transit. He felt transit was increasingly an expensive service that competed for other county needs. He recognized that user fees needed to be a part of providing service.

    Commissioner McDaniel recognized there was an economic balance to be maintained. Transit services should be priced to encourage the use of public transit, making it more desirable than driving a single occupancy vehicle that adds to congestions, traffic, and pollution.

He added there was a financial benefit to transit relieving the demand and congestion on roads and potentially delaying costly investments in the construction of more transportation infrastructure.

Commissioner McDaniel stated there should be more discussion on transit financing, options, and the use of incentives to drive ridership. He added he would like to a more discussion surrounding equitable user fees rather than just a flat fee regardless of cost. He noted there did not appear to be any discussion regarding incentives. He stated he would not support a mandate that asked municipalities to contribute to transit funding.

35. Would service expansion be considered if a municipality funded it?

Commissioner McDaniel responded he could envision where a municipality may have a specialized need that they would want to fund. He mentioned how Marco Island as a barrier island could have a need related to the service industry jobs located there and the need to bring workers onto the island. He stressed this would have to be studied and a strong business case presented for it have support.

36. Can you comment on the outlook for transit?

Commission McDaniel felt the outlook for transit will focus on transitioning. He felt with the increasing use of artificial intelligence (AI) and connected and automated vehicles (AV), significant changes can be expected. He noted public transit needs to be on the forefront of technology to help build a more responsive and efficient system. He noted there had been some discussion regarding technology and the scheduling software, but he felt it was still developing.

Commissioner McDaniel expressed concern over the cost and expense of providing transit service. He felt there was insufficient information presented for policymakers to consider. He noted other areas discussion cost-benefit ratios that help to justify continued investments and expansion of services. He did not feel he had that information when discussing transit services.

He acknowledged, providing transit in Collier County was challenging with a population distribution that was cumbersome due to the layout of the county. He noted there weren't concentrated areas of high density that needed to be served by transit. Rather, he commented, Collier's population and even growth patterns appear to be disbursed throughout the County.

Commissioner McDaniel expressed frustration at how some studies were presented to the Board of County Commissioners. He referred to a regional fare study that did not concern operational perspective of charging fares. Rather, the study focused on rider sentiment which was biased.

He added, the Board has not seen a study where the cost benefit analysis for transit has been presented. He felt the Board needed to fully understand how the investments in transit were balanced against the services provided in a variety of areas. He noted there were some intrinsic fixed costs which should be balanced against benefits such as reducing congestion and pollution. He stated he has never seen an analysis of that kind.

Commissioner McDaniel added, the idea of employer contributions may be neutral. He noted employers can subsidize transit, but they will equally pay higher wages to attract talent. He stated businesses see this as a cost of doing business in place like Collier County.

Commissioner McDaniel gave an example, noting he did not know what the annual ridership of CAT was. He felt this information provided important context in decision making. He felt business metrics such as the rate of return on transit investments should be part of any recommendation. He felt discussions regarding route changes and timing needed to be considered as business decisions. He noted he could not recall ever having those discussions, adding as technology helps with operational efficiency, there was an opportunity to measure productivity and see improvements.

Overall, Commissioner McDaniel stated he was neither optimistic nor pessimistic about the future of transit. Rather, he stated he wanted to see more information with a stronger business model for evaluating performance.

Date: **July 3, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview Council Member Linda Penniman, City of Naples (Policy Maker)

Council Member Linda Penniman was interviewed via telephone on July 3, 2024. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Council Member Penniman's comments.

Interview Questionnaire

37. How familiar are you with transit overall?

    Council Member Penniman started the interview commenting on the evolving role of e-bikes. She wanted to stress that a discussion on e-bikes and their role within the transportation network and particularly within transit should be further explored. She noted that FDOT has a white paper on e-bikes and this information should be shared and discussed at the Collier MPO. She added that e-bikes can be a transportation alternative allowing the workforce to access more jobs, create more flexibility, and connect more people with jobs. She felt there had not been sufficient information and discussion on their emerging role.

    Council Member Penniman stated her familiarity with CAT primarily came from her role at the MPO. She felt there had been a great deal of discussion on serving people with handicaps, limited mobility and with no other transportation options. She was somewhat familiar with CAT operations as a whole and she has observed CAT buses in circulation throughout the County. She stated she was familiar with transit, having grown up in an area with public transportation.

38. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

    Council Member Penniman stated she would like to see e-bikes further vetted and additional information should be provided to policymakers and other decisionmakers. She noted that e-bikes were growing in popularity and provide another transportation option. She added they allow users to travel farther and provide more flexibility and reliability that traditional fixed-route transit that operates on a schedule. She felt it was an excellent option for individual mobility.

    Council Member Penniman commented the role of private transportation providers that are providing on-demand services. She felt there was a role for these private providers to supplement transit service in some areas. She stated these options should be explored and discussed as part of developing plans for transit.

    Council Member Penniman stated overall her impression of transit services was heavy influenced by her use of transit growing up. She stated many people who come from areas with robust transit

systems and may have a bias when discussing transit in Collier. She stated places with robust transit evolved over many years with concentrated areas of populations to serve. She noted these conditions are very different from transit in the City of Naples and Collier County.

39. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

    Council Member Penniman stated she is aware of CAT operations. Through her work on the MPO she was part of some discussions regarding transit and paratransit services. She noted that the MPO has been diligent in including transit in discussions and plans as part of a multimodal approach. She commented her work on the MPO was very important and had been reappointed. She felt being part of discussions at the MPO was important to the coordination between the City, the County and the MPO.

40. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

    Council Member Penniman stated CAT role must include getting people to work every day. She felt connecting people and jobs was critical to CAT's role in the County, as well as to the businesses that need workers.

    She commented on her experience working in Immokalee. She noted that people in Immokalee are solving the transportation gap by organizing their own carpools and vanpools. She stated that this has become part of the culture where transportation options are very limited. She felt there should be a way to support these areas with dependable, safe, public transportation. She recognized this would be a significant challenge for CAT, noting the long travel distances, the hours of operations, and other constraints.

    She stated providing public transit has its challenges everywhere, not just in Collier. She noted in places where it snows, people wait for buses in very cold conditions. Effective transit must account for all these operating conditions and still be extremely punctual for people to use it and rely on it.

    Council Member Penniman expressed a desire to see the appropriate size vehicle in operation. She felt the larger buses were not appropriate for circulating on every route. She noted having appropriate size vehicles, vans, and other smaller vehicles could be shown to be more operationally effective. She was also concerned how empty buses may be perceived as an inefficient use of transit resources.

41. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

    Council Member Penniman stated transit must be operationally efficient. It must be flexible, responsive, and light. She felt there should be a reasonable business approach to meeting demand. She added transit was an integral part of the whole transportation network in Collier County, adding CAT should foster confidence in the system.

In discussing the financing of transit, Council Member Penniman stated this is an area that needs to further be discussed. She noted that for a rider, a dollar may represent a significant amount of their budget or cost of getting to work. She felt transit has a role in facilitating access to jobs but there is also an opportunity to work with employers who are benefiting from the workforce to connect people and jobs.

Council Member Penniman stated CAT needs to study how transit is monetized in other places.

She noted the City of Naples has very limited land which is very expensive. She added it also has an ongoing demand for service workers and there are good paying jobs in Naples. She noted the high cost of living within the City means workforce and affordable housing are not located nearby. She stated this also applies to other areas of Collier County with over 54,000 vehicles traveling into Collier County on I-75 from Lee County almost daily. She felt there needed to be more coordination with Lee County policymakers.

Council Member Penniman stated there was nexus between available work, affordable/workforce housing, and areas where new jobs are coming. She added that nexus should be studied and addressed in upcoming plans. She felt supporting economic development, job creation, and transportation connections was important to the area.

Council Member Penniman stated CAT needs to identify opportunities and develop plans to capitalize on them. She noted she was part of a discussion at the MPO regarding the use of railroad tracks near Goodlett-Frank Road which could be used to connect trails with roads and transit to improve traffic circulation. She felt the use of e-bikes made this even more viable.

She added, when people are driving, they must focus on operating the vehicle. When people are riding in transit, either on a bus or rail, there is an opportunity to do other things and use that time productively. They can make calls, read, or do other things while someone else drives. She noted the time in a car is wasted.

42. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

    Council Member Penniman felt connecting people and work is critical to transit service in Collier. This should be a focus for CAT.

43. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

    Council Member Penniman stated CAT needs to better monetized the transit system. She suggested transit approach the Chamber of Commerce and bring them into the discussion. Their role in the business community will be helpful in connecting economic development activities with transit services that will support them.

    She felt that employers like Arthrex are forward thinking and will support transit as part of their business model. She felt employers could support transit as an option.

Council Member Penniman stated she would like to see more information and discussion surrounding the penny-sales tax. She felt it was important to understand how much community support there was for transportation initiatives funded by the penny sales tax. She felt transit could be better supported by these initiatives. She felt people would be supportive of efforts that connect people with jobs and that included supporting transit.

She added, bringing the business community into the finance discussion would be helpful and important to getting them to participate in transit as a solution. She noted, transit cannot be funded by transit users who have limited transportation options and limited financial resources.

Council Member Penniman stated, ideally transit would be readily accessible and connect major activity centers. She added, providing transportation options for people who simply did not want to drive was an important goal. She felt older populations would benefit if there was a transportation option such as transit that meant they did not have to drive everywhere.

44. Would service expansion be considered if a municipality funded it?

Council Member Penniman did not see a problem with municipalities funding transit within their areas. She felt every community has to make decisions that address their constituents needs and concerns. She did note, there needed to be further discussion before CAT elects to pursue this and examine how the service would connect through the County. She felt there needs to be transparency in who is paying for the additional services and how that would work within the transit system.

She stated financing transit is important and should be carefully planned out and defensible. She felt the penny sales tax needs to be discussed as an option for transit.

45. Can you comment on the outlook for transit?

Council Member commented the outlook for transit, stating it was very complex. She noted she was reading “The Great Displacement: Climate Change and the Next American Migration” by Jake Bittle and considering the implication for Naples, Collier County and Southwest Florida. She felt while some growth will continue, but there is a movement of people who are relocating due to storms, the high cost of living, and other factors. She felt this trend should be discussed. She stated the community needed to be prepared for emerging trends.

She felt the need for affordable workforce housing was an important consideration for Collier overall impacting several areas. She added this included transportation and especially CAT as they work to support connecting people and jobs.

She noted she would like to see more cooperation and collaboration between Lee and Collier Counties. She expressed concern at the amount of people commuting into Collier because of where affordable housing is located. She stated the coordination between Lee and Collier needed to focus on transportation impacts, facilitating connecting jobs and workforce housing as well as the congestion, traffic, and safety in the transportation network including I-75.

She stated she would like to see FDOT’s white paper on e-bikes as she sees this as a continuing trend.

She concluded. there is a place for transit in Collier County as part of its transportation network that supports growth economic activity, building and construction. She felt there needs to be continued discussion on how CAT will connect with employment centers. She hoped that the issues she raised would be further discussed and fully vetted.

Date: **July 2, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview Councilman Berne Barton, City of Naples (Policy Maker)

Councilman Barton was interviewed on July 2, 2024, in person at his offices in Naples, Florida. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Councilman Barton's comments.

Interview Questionnaire

46. How familiar are you with transit overall?

    Councilman Barton referenced his role on the Collier MPO and as a representative for the City of Naples as his primary source of knowledge about CAT. He felt transit was an important part of the transportation network and should be used to address the traffic and congestion issues Collier is experiencing. He noted the City of Naples was not growing, stating rather that the population of approximately 20,000 within the City has been stable. He noted there is some redevelopment, but very little development or expansion. He contrasted this with the growth experienced throughout the Collier County and pressure from development. Councilman Barton felt the continued growth in Collier County continues to be part of the CAT discussion.

    He added that he was familiar with CAT and frequently saw CAT vehicles operating within the City. He noted although he has not used CAT, he recognizes transit is imperative for access to jobs within the City.

47. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

    Councilman Barton did not have any specific discussion points to raise. He stated his constituents had not raised any concerns regarding CAT service. He was confident if his constituents had experienced any problems with CAT service, they would have made them known to the City.

48. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

    Overall, he felt CAT was an effective operation. He noted CAT operates within the City with no bus pull offs, but they manage not to significantly impede the flow of traffic, limiting how long they stay pulled over and holding traffic. He stated he see the CAT vehicles in operation and feels there is an appropriate level of service within the City.

49. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

    Councilman Barton noted he had limited personal experience with CAT, but overall, felt CAT provided a valuable service. He indicated connecting workers who live outside the area with jobs within the City of Naples was an important objective for CAT. He added CAT provides options for a variety of Collier County residents and having alternatives/options is important.

50. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

    Councilman Barton stated he had limited information with which to make a recommendation but felt the CAT service area was very large and growing. He noted the County was expanding considerably with growth in the North and Northeast corridors, citing Ave Maria as an example. He felt there was continued growth already approved in these areas, with more expected to come. He noted connecting the workforce that may reside further away from jobs will become increasingly important, especially given the cost of housing within the City of Naples.

    Councilman Barton noted there could be some interest in premium services. He stated for example providing express service to the airport (RSW) and other major destinations could serve tourists and visitors. He felt CAT adequately evaluated service needs.

51. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

    Councilman Barton stated Collier County is experiencing a major affordable housing challenge. He stated trend continues to move the workforce away from jobs in the City and the County as a whole. He stated the City of Naples' economic needs surround the tourism industry and in the service industry sectors. He added filling these jobs creates traffic and congestion which could be helped with efficient transit service. He felt that the workforce continues to move further away from jobs in Collier County.

    He stated although service workers primarily use transit, he felt there was an opportunity to provide transit service that appealed to tourists and visitors.

52. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

    Councilman Barton expressed the responsibility to be a good steward of taxpayer's money. He expressed an interest in seeing some of the industries prospering from tourism contribute in some way to supporting transit. He stated part of the solution of funding transit should include those benefiting from the economic activity in Collier including tourism, lodging, airlines, and developers. He noted this should include efforts to provide affordable housing for workers.

53. Would service expansion be considered if a municipality funded it?

    Councilman Barton felt municipalities could participate in the funding, noting those are discussions for those policymakers. He did not think this would apply to the City of Naples due to the relatively small size of the City.

54. Can you comment on the outlook for transit?

    Councilman Barton felt the outlook for transit needed to consider the rapid growth in the County and the traffic congestion as a top issue. He stated a robust transit system was needed to alleviate commuter traffic, traffic congestion, and to help take vehicles off the road. He felt visitors and tourism to be part of the community and should be considered in any future plans.

    He noted that preserving the City of Naples and Collier County's unique qualities including its pristine environment was critical to its continued success and economic competitiveness.

    Councilman Barton was positive about embracing technology in general but wanted to see CAT take a business approach to its implementation and use. He stated the adoption of technology, including adoption of electrical vehicles should be fully vetted. The technology should be proven with documented results before CAT makes significant investments.

    He added that maintaining a livable community and preserving Collier County's resources were important to its economic property and maintaining the current standard of living. He added it is the reason people continue to move here and we all have a responsibility to continue to safeguard resources, maintain a high standard of living, and make wise investment decisions.

Date: **July 18, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview Councilman Rich Blonna, City of Marco Island (Policy Maker)

Councilman Rich Blonna was interviewed via telephone on July 18, 2024. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Councilman Blonna's comments.

Interview Questionnaire

55. How familiar are you with transit overall?

    Councilman Blonna stated he has been working closely with CAT to bring enhanced transit service to Marco Island during the winter tourist season. He stated he has been looking at the feasibility of trolley service with a loop route to service the most heavily visited areas on Marco Island. He added this work had led to a better understanding of the constraints and challenges of providing transit.

    He noted there are significant challenges to cost sharing and operations which have made it difficult.

    Overall, he noted while his interactions with CAT have been focused on the trolley service he has a high-level understanding of transit operations in Collier County. He noted he is also involved with Conservation Collier and as a liaison to various committees which keep him very busy.

    He added he had recently become aware of the Public Transit Advisory Committee (PTAC).

56. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

    Councilman Blonna stated his work trying to implement transit on Marco Island is a clear example of how transit solutions are difficult to implement. He stated public funding, and the state and federal grant restrictions offer little opportunity to tailor services to a community's needs, be creative, or partner to fund transit solutions.

    Councilman Blonna stated he would like to address the congestion and safety concerns during the peak winter season. He noted 2 trolleys in operation in a loop configuration could allow visitors on Marco Island to travel between the most frequented areas along 4 connected roadways. Ideally visitors could come on to the island and park their car and not move it until they left. He added or better yet, they could take a taxi or Uber and not bring any more cars onto the island.

Initially, he proposed a shared funding model where the business community through advertising revenue could be used along with fares and a discounted rate from CAT to fund a pilot. He stated after speaking with CAT, it was obvious the bureaucracy is inflexible. He added, Marco Island cannot create a separate pool of resources specific to its needs. It is all part of the larger county-wide system.

Councilman Blonna noted CAT staff had been very helpful and he appreciated working closely with them. He stated CAT staff is bound by bureaucracy and the service request for Marco Island is an outlier, making the service a challenge to implement. He noted this was in addition to some hesitancy with the City Council. He stated there was a clear contrast between public and private initiatives. He added, he was confident the pilot project would work.

Councilman Blonna explained he is a supporter of transit solutions and visited Anna Maria Island to observe the trolley system there. He said it was a great experience and helped him develop some of his approach. He stated they arrived at Anna Maria, stayed in a beach front cottage and took the trolley everywhere without ever moving his car. He added he is still researching how the service was started by Manatee County and then transferred to their Chamber of Commerce. Councilman Blonna said he is interested in learning more, especially the lessons learned from implementing the service.

He concluded, noting there is potential to connect other parts of the county. He pointed to Donna Fiala Eagle Lakes Community Park and the opportunity to connect with bicycle paths. He expressed support for transit connections with bicycles, putting bicycle racks on buses. He stated connecting these modes was important.

57. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

Councilman Blonna expressed he had a high level of awareness of CAT. He noted he took participated in a free ride day and rode Route 21 to Marco Island. He felt it was important to experience the service firsthand. He stated that riding transit provided a beautiful perspective where you can see over cars into the distance and see the natural areas. It provided a wider view of the natural resources surrounding the area.

He added, there are some misconceptions about who is riding transit and the fear of overcrowding. He stated the positive impact of transit, reducing the number of cars on the roadway, eliminating the need to find parking at popular destinations, and the comfort and ease of riding transit are consistently understated. He stated, there is also an important opportunity for people coming to work in Marco Island. He added, employers and the workforce, visitors and residents can all benefit from transit service on Marco Island.

58. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

Councilman Blonna responded transit can have a role in all the options presented with the proposed trolley service. He stated he is focused on Marco Island, but this pilot provides an example of how transit can meet community needs.

He stated Marco Island and the trolley pilot could operate over just a few blocks in a loop, connecting riders with shopping, dining, and even City Hall.

Councilman Blonna commented on the area's demographics which show an aging population which will become depend on transit. He noted right now, this demographic may be hesitant about implementing transit solutions, but trends support developing transit. He added, Marco Island is attracting younger residents and more cosmopolitan people who travel and are familiar with transit, including international visitors. He stated even work patterns are changing, where some workers can choose to work from home and given an option may not want to drive. He added multiuse development is also changing how much people depend on cars. Councilman Blonna stated he understood transit was not the solution for everything, but he added it needed to be part of the mix of solutions.

He added Marco Island needs to develop different transportation options.

59. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

Councilman Blonna agreed all the options listed where areas where CAT needed to develop. He stated mobility on demand was not popular on Marco Island and he stated it may have limited application.

He stated the hotels and condo would likely not use the traditional fixed route bus service or the larger buses, but they would support branded, smaller vehicles that reflected the local character.

Councilman Blonna stated service aimed at tourist, that was temporary such as during the winter season would make sense and help with congestion.

Councilman Blonna was confident the beach trolley will be well supported once it is implemented which is why a pilot project is so important. It will demonstrate how transit can relieve congestion, demand for limited parking, and allow people to get around Marco Island without a vehicle.

60. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

Councilman Blonna agreed all the customers mentioned should be fully explored.

He stated visitors have needs very different from the workforce that may be accessing jobs on the island. Marco Island is removed and difficult to access. He noted workforce traveling in from Golden Gate, Immokalee, and other outlying areas can find Marco Island too far. He added professional staff, government workers, fire, and police – he did not see them using public transit based on their profession.

Councilman Blonna was confident CAT was looking at all their customers and trying to make sure to connect the service with the riders. He noted, this was not always possible.

61. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

    Councilman Blonna stated the finance side of transit was complicated. He felt that advertising revenue could be increased to reflect market rates. He noted the current rates are substantially lower than they should be. He added fares appeared to be flat across the board, rather than reflecting the service. He stated this was an area that could also be updated to better reflect a market approach. Councilman Blonna suggested improved business relationships with government agencies, businesses, and other groups could help to underwrite some of the costs.

    Councilman Blonna stated Marco Island has lowered taxes the past few years resulting in less funding for projects such as the trolley. He stated he would continue to advocate for transit on Marco Island during season.

62. Would service expansion be considered if a municipality funded it?

    Councilman Blonna stated Marco Island would likely not fund service expansion without some incentive. He stated there was an opportunity to engage the business community. And while he did not think the business community would agree to outright fund transit service, he felt if they could underwrite the cost through advertising.

    He noted sharing costs brings stakeholders together.

63. Can you comment on the outlook for transit?

    Councilman Blonna stated the outlook for transit is greatly dependent on who is moving along the 951 corridor. He felt the growth in the eastern part of Collier County will continue to drive growth and that growth will look for alternatives to just driving.

    He added the lack of parking will also impact how people visit and frequent popular destinations. If people find it too difficult to park and there is no transit option, they are likely to go elsewhere.

    Councilman Blonna was confident newer residents to Collier County will have an impact on the demand for transit. He stated people will want options to driving and the added benefits of reduced congestion, impacts to the environment, and time savings will make transit more desirable. He stated this would be bolstered by new residents who come from places with lots of transit. He stated as long as the transit service matches the demand and character of the location he was positive on the outlook for transit.

Date: **August 1, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: **Peer Selection Methodology – for review**

Your review of the attached Situational Appraisal is requested.

Table of Contents

1 PEER SELECTION METHODOLOGY 1
1.1 Introduction 1
1.2 Initial Peer Group 1
1.3 Overview of Methodology 2
1.4 Normalizing Cost Data 4
1.5 Comparison of Results with Previous TDP 5
1.6 Stage 2 Secondary Screening 6

2 FINAL PEER GROUP SELECTION 6

3 CHARACTERISTICS OF PEER SYSTEMS 8

APPENDIX A – PRIMARY REVIEW DATA VALUES FOR ALL FACTORS AND POTENTIAL PEERS 1

APPENDIX B – PRIMARY REVIEW LIKENESS SCORES FOR ALL FACTORS AND POTENTIAL PEERS 1

1 Peer Selection Methodology

1.1 Introduction

The following memorandum is an update to the original peer selection undertaken in 2020 as part of the previous TDP. Updating and re-analyzing past selected agencies as well as being open to adding new agencies are important during the process of selecting relevant and useful peers for comparison, as this allows Collier Area Transit (CAT) to continually improve and compare itself with relevant peers. It is also important that the chosen peers reflect areas and agencies that can be thought of as aspirational to help CAT identify a path forward for improvement. As a result of this process, nine new peers have been selected for consideration.

The peer selection process followed the methodology provided by the Transit Cooperative Research Program (TCRP) Report 141: A Methodology for Performance Measurement and Peer Comparison in the Public Transportation Industry and recommended by the FDOT TDP Handbook (2022). Peer comparisons use selected performance indicators, effectiveness measures, and efficiency measures to illustrate the performance of the CAT fixed route system relative to the peer group. The peer identification methodology and the identified peers are described below.

Best practice typically dictates that a peer group is comprised of eight to ten peers, for the purposes of this TDP, 16 agencies have been selected for the first level assessment. It is crucial to make sure that the right peer agencies are selected to provide credible comparisons that can provide insight and trigger action, compared to badly chosen peers which can produce irrelevant results.

1.2 Initial Peer Group

An initial peer group of agencies similar to CAT was formed, and likeness scores were calculated to determine their similarity and appropriateness. For this TDP update, all agencies included in the previous TDP report were retained, along with additional agencies deemed similar to CAT. This initial peer list consisted of 16 transit agencies as shown in the following table:

Table 1-1: Transit System Peer Review Selection

Transit System	**Location**	Peer Description
The M (Montgomery Area Transit)	City of Montgomery, AL	From Previous TDP
TTA (Tri-State Transit Authority)	Huntington, WV	From Previous TDP
The Wave Transit System	City of Mobile, AL	From Previous TDP
ART (Asheville Redefines Transit)	City of Asheville, NC	From Previous TDP
GCT (Gwinnett County Transit)	Lawrenceville, GA	From Previous TDP
PCPT (Pasco County Public Transportation)	New Port Richey, FL	From Previous TDP
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	From Previous TDP
Breeze Transit (Sarasota County Area Transit)	Sarasota, FL	Newly Added

LeeTran (Lee County Transit)	Fort Myers, FL	Newly Added
Bayway (Bay County Transportation)	Pensacola, FL	Newly Added
GoLine (Indian River County)	Vero Beach, FL	Newly Added
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	Newly Added
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	Newly Added
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	Newly Added
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	Newly Added
GTA (Greensboro Transit Authority)	Greensboro, NC	Newly Added

The selection of potential peers was conducted using the peer selection methodology outlined in the FDOT TDP Handbook, employing validated 2022 National Transit Database (NTD) data and the Florida Transit Information System (FTIS). The pool of potential peers consisted of transit agencies located in the southeastern United States, specifically those with coastal characteristics in their geographic profiles.

From the newly identified transit agencies, Breeze Transit (Sarasota, FL), LeeTran (Fort Myers, FL), Bayway (Pensacola, FL), GoLine (Vero Beach, FL), and Citrus Connection (Lakeland, FL) were chosen because they are situated within Florida, either in coastal counties or counties near Collier County. Additionally, CARTA (North Charleston, SC), ECAT (Pensacola, FL), and CCRTA (Hyannis, MA) were selected based on their recommendation as top peers to CAT according to the FTIS Urban iNTD tool. It is worth noting that ART was also recommended but was already included in the previous TDP peer group.

1.3 Overview of Methodology

The methodology for selecting the final peer group adheres to the guidelines outlined in the TCRP report. This process involves comparing data values for CAT and potential peer agencies using various indicators to calculate likeness scores for each indicator between CAT and each potential peer agency. The first stage was the primary review, which involved initially selecting indicators and scoring their likeness to CAT, then a comparison was made from the new peers against the previous TDP peers to determine whether the new peer group had a similar likeness and provided a good comparison overall to CAT. A secondary review was initiated to provide further insight to the primary likeness score where 2 new indicators were used. Results were then drawn utilizing the likeness score from the primary review, referencing the secondary review, and weighing the location and demographic of the locations to determine the results. This comprehensive approach ensures a robust and well-rounded peer selection process. The methodology recognizes that peers will not be identical in all categories, accommodating variations and allowing for similarity in only a few key categories.

The methodology outlined in the TCRP report identifies fourteen indicators for selecting peer agencies, primarily based on demographic characteristics and other exogenous variables, as utilized in the FTIS tool. While adhering to the TCRP guidance for peer selection, our approach slightly diverges in the factors used to assess potential peers. Rather than focusing primarily on exogenous variables, we prioritized various transit system performance measures as the primary criteria for peer selection. These performance indicators were considered more relevant for comparing peers, particularly in the context of enhancing transit system effectiveness. Nonetheless, demographic variables were still integrated into the peer selection process, although greater emphasis was placed on transit performance indicators.

As such, the potential peer agencies were analyzed based on the following 14 indicators: 8 operating characteristics and 6 exogenous variables.

- Operating Characteristic Indicators
    - Vehicles Operated in Maximum Service
    - Annual Passenger Miles Traveled
    - Annual Vehicle Revenue Miles
    - Annual Vehicle Revenue Hours
    - Number of Revenue Vehicles
    - Total Revenue Miles Operated
    - Total Operating Expense
    - Percent Service Demand Response
- Exogenous Variables
    - Service Area Population
    - Service Area Density
    - Service Area
    - Population Density
    - Urban Area Population
    - Population Growth Rate

The selection of these indicators for primary transit peer analysis ensures a comprehensive and robust assessment of both operational performance and contextual factors. Key operational characteristics such as vehicles operated in maximum service, annual passenger miles traveled, and total operating expenses provide critical insights into efficiency, capacity, and financial health within transit operations. Metrics like percent service demand response and annual vehicle revenue hours are essential for evaluating service quality and responsiveness to demand.

Given the growing emphasis on operational efficiency and the increasing adoption of demand response services, the percentage of service demand response serves as a particularly noteworthy indicator. It helps gauge where agencies stand in this evolving process, acknowledging disparities between agencies at different stages of implementing demand-responsive solutions.

Including exogenous variables such as service area population, density, and population growth rate contributes to a comprehensive understanding of the demographic and geographic contexts influencing these transit systems. This holistic approach ensures a well-rounded comparison, capturing both internal performance metrics and external factors that impact transit operations.

To create a chart that scores each category comparing CAT to other transit systems, a likeness score for each factor was calculated. This likeness score is a representation of the difference between two data values. Data values that are identical between the peer agency and CAT result in a score of 0 (which is very rare and highly unlikely), while a score of 1 represents a percentage difference of 100%, indicating that the value for one agency is twice the amount of the other. In essence, the larger the difference between the values of the agencies, the higher the score, and vice versa. Peer agencies that have larger differences in values should be avoided and are undesirable due to greater dissimilarity between factors but could still potentially be used with caution after screening for potential prominent differences that could deem them an unsuitable peer.



The likeness score is determined by calculating the percentage differences between the values for CAT and the peer agency, using the following formula:

$$\text{Likeness Score} = \frac{|F_{\text{cat}} - F_{\text{peer}}|}{\max(F_{\text{cat}}, F_{\text{peer}})}$$

Where:

- F_{cat} = the target agency's value for a given factor,
- F_{peer} = the peer agency's value for the same factor, and
- **max(F_{cat}, F_{peer})** = the maximum of the two values being compared.

As per the scoring guidance provided in the TCRP Report, the likeness scores are rated as such:

- **0.00 – 0.50: Good score**; none or small difference percentages, ideal matches to use
- **0.51 – 0.75: Satisfactory score**; smaller difference percentages, decent matches to use
- **0.76 – 0.99: Mediocre score**; larger difference percentages, could be used but check for anomalies
- **More than 1: Poor score**; large differences percentages, poor match, avoid using if possible

The 2022 data values for each of the 14 indicators and 17 transit agencies, including CAT, can be found in the data tables in Appendix A, and the corresponding likeness scores calculated for each indicator and agency in Appendix B. The likeness scores are highlighted according to the score breakdown as previously described, in that the good scores are in green, satisfactory scores are in yellow, decent scores that require more investigation are in orange, and poor scores are in red. This breakdown helps to easily identify which peers are more similar to CAT in which aspects.

1.4 Normalizing Cost Data

To accurately reflect cost values, cost data was normalized to reflect the impacts of differences in labor costs between geographical regions. It is important to consider labor cost differences as it allows for conclusions to be drawn with more certainty that the cost differences between agencies are due to internal agency efficiency variances rather than external cost variation. Labor costs are also typically the largest component of an agency's operating costs.

To adjust for differences in labor costs between counties, average labor wage rates were used to recalculate cost data. Annual average weekly wages for 2022 were obtained from the US Bureau of Labor Statistics Quarterly Census of Employment and Wages. All occupation types were included in the average calculation as agencies have no control over general labor environments in the county, which the cost data is being adjusted for, as opposed to the industry-specific labor rates that the agencies have some control over. Including all occupations also allows for an agency to analyze how much of its labor is spent in comparison to the county's average wages, as well as to adjust its costs to reflect changes in the county's overall cost of living. The peer agencies' cost data was adjusted for labor cost differences by multiplying the labor cost portion of the agencies' operational expense values from NTD by the ratio between Collier's average labor cost over the peer agency county's average labor cost.

1.5 Comparison of Results with Previous TDP

As multiple transit systems were analyzed, calculations were performed to assess differences between the previous peer group from the 2020 TDP and the newly added peer agencies. For each potential peer, the sums of the exogenous variables and operating characteristics were calculated separately to identify which peers were most like CAT for each of the categories of indicators. An average score was then computed for easier comparison between the peer group from the previous TDP and the new potential peers using the following formula:

$$\text{Total Likeness Score} = \frac{\sum_{i=1}^{n} \text{Factor Likeness Score}_i}{n}$$

Where:

- **Total Likeness Score** = the average score representing overall similarity.
- **Factor Likeness Score** $_i$ = the likeness score for the i-th factor.
- n = the total number of factors.

The results indicated that the newly added peers had a higher average score in operational characteristics compared to the previous TDP peer group. While this suggests that the new peers are less similar to Collier County overall in terms of operational characteristics, it is still a valuable comparison. Focusing on operational characteristics is crucial as they directly impact service delivery and customer satisfaction. Additionally, the new peer group includes 9 peers compared to the 7 in the previous group, which can slightly elevate the average score due to the larger sample size.

Moreover, many of the new peers possess coastal features, which is a significant consideration for Collier County. These similarities in geographic characteristics can provide more relevant insights and best practices tailored to coastal areas. Exogenous factors such as demographics, which are major considerations for the new peer agencies, and operational characteristics such as service delivery modes and vehicle utilization are also critical. Coastal and geographic locations are necessary to consider due to their unique environmental and operational challenges. The exogenous variables for the new peer agencies are low, with an average score of 2.89, indicating closer data values to that of Collier County for these external factors. This is beneficial as it ensures that the newly added peers reflect similar contextual influences, further supporting their relevance. Therefore, despite the higher scores in operational characteristics, the new peer agencies remain a relevant and useful selection for the TDP update.

Table 1-2: Average of Likeness Score Sums by Peer Group

Peer Group	Average for Operating Characteristics	Average for Exogenous Variables	Average for All Indicating Factors
Previous TDP Peers	2.45	3.67	6.99
New Peers Considered	2.87	2.89	5.75

1.6 Stage 2 Secondary Screening

A secondary screening of the potential peer group is recommended to fully account for all potential factors and allow for the most comparable peers to be chosen. Two new variables were introduced to the 16 peers: service area type and fare revenue. These secondary factors provide a more nuanced and comprehensive evaluation of transit performance, ensuring that peers are truly comparable in all relevant aspects to CAT.

Service area type significantly impacts performance and influences demand patterns and requirements. Of the eight service area types based on the FDOT TDP Handbook, six were characterized for the 16 peers and are as follows:

- Type 2: Agency provides service to multiple urban areas (may also include non-urban areas) and is the primary service provider within at least one urban area's central city.
- Type 3: Only agency operating within an urban area and has no non-urban service.
- Type 4: Agency is the primary service provider in the urban area's central city, where other agencies also provide service to portions of the urban area. Urban areas with multiple central cities (e.g., Tampa–St. Petersburg) may have more than one type 4 agency.
- Type 5: Agency provides service into an urban area's central city, but its primary service area does not include a central city.
- Type 6: Agency provides service within an urban area but does not provide service to a central city.
- Type 7: Only agency operating within an urban area and providing non-urban service.

Fare revenue values were evaluated to determine revenue generation, service affordability and accessibility, and subsidy requirements. Comparing agencies with similar fare revenue structures highlights effective fare policies and strategies, ensuring that transit services remain financially sustainable and accessible to the public.

By incorporating service area type and fare revenue as secondary screening factors, the analysis ensures a fair and comprehensive comparison with the primary agency, CAT. This approach helps compare the primary review of the operational characteristic and exogenous variables and identify truly comparable peers and provides a deeper understanding of the factors influencing transit performance, ultimately supporting more informed decision-making for CAT.

2 Final Peer Group Selection

An initial set of 16 potential peer agencies was identified for CAT (see Table 1-1). From this group, poor comparing peers were filtered out based on the overall likeness scores from the primary review, supplemented by additional likeness scores from the secondary review. Peers with many high scoring factors or higher overall likeness scores were removed as it meant they have less similarity to CAT. 11 peers with the lowest scores in the primary review were selected as the CAT peer group. As shown in the likeness score tables in Appendix B, the potential peers all do well as most of the individual factors score well (below 0.5). The exogenous factors appear to compare more poorly in contrast to the operating factors, as there are more satisfactory and mediocre scores. There are very few poor-scoring factory-agency pairs;



ART and GTA with poor scores for the percent service demand response factor, and The M and The Wave Transit System have poor scores for the population growth rate factor. As such, these agencies were removed from the final peer group.

The last table in Appendix B shows averages and sums of the likeness scores grouped by operational, exogenous, and all factors, as well as by peer group. The likeness scores in each column are formatted in order from the lowest and best scores to the highest and worst scores in a green to red color scale. This table depicts which agencies score better across all factors. Most of the peer agencies from the previous TDP scored poorly for exogenous and all factors. The M, TTA, and ART consistently had poor scores across all groups, and were removed from consideration for the final peer group, along with GCT and PCPT.

The secondary review, which accounted for service area type and fare revenue, was necessary but less significant than operational characteristics, from the primary review, in this TDP. Consequently, if the secondary review led to a substantial increase in the peer likeness score, it was disregarded. This decision was based on the fact that only two indicators were used in the secondary review, making them less critical compared to the primary review.

Subsequently, upon conducting the secondary review, one peer agency was found to have incomplete NTD data. The 2022 NTD data for GoLine was missing the fare revenue information, which is one of the two indicators used in the secondary review. As such, this agency was also eliminated from the final peer group.

The following table lists the final 10 selected peers, their likeness score, and their selection reasoning.

Table 2-1: Average of Likeness Score Sums by Peer Group

Peer Agency	Likeness Score	Reasoning for Top 10 Selection
Breeze Transit (Sarasota County Area Transit), Sarasota, FL	6.98	Likeness score and location of the peer is desirable.
LeeTran (Lee County Transit), Fort Myers, FL	7.80	Likeness score from the primary review was substantially lower and location of the peer is desirable.
Bayway (Bay County Transportation), Pensacola, FL	6.03	Likeness score and location of the peer is desirable.
ECAT (Escambia County Area Transit Authority), Pensacola, FL	6.05	Likeness score
CCRTA (Cape Cod Regional Transit Authority), Hyannis, MA	6.30	Likeness score
CARTA (Charleston Area Regional Transportation Authority), North Charleston, SC	6.06	Likeness score
Citrus Connection (Lakeland Area Mass Transit District), Lakeland, FL	5.68	Likeness score and location of the peer is desirable.
The Wave (Cape Fear Public Transportation Authority), Wilmington, NC	5.49	Likeness score
The Wave Transit System, City of Mobile, AL	6.81	Likeness score
PCPT (Pasco County Public Transportation), New Port Richey, FL	6.35	Likeness score

It is important to note that three of the selected peers were peers from the previous TDP: The Wave Transit System, PCPT, and The Wave, while the remaining peers are new.

3 Characteristics of Peer Systems

The following are brief descriptions of the transit agencies in the final new peer group for comparative purposes. The peer and trend analysis were conducted with this set of peers. The data values in the agency profiles were all obtained from NTD 2022 data. The total operating cost values included in these agency profiles are the original cost values from NTD and are not adjusted for labor cost differences. The recalculated operating costs used for likeness scoring can be found in Appendix A. The service type information in the profiles was gathered from each transit agency's respective website.

Baseline Transit Agency: CAT (Collier Area Transit), Naples, FL
Services provided: Fixed-route bus and paratransit services
Service area population (2022): 384,902 people
Service area population density (2022): 172 persons per square mile
Annual revenue hours (2022): 124,701 hours
Annual ridership (2022): 746,338 unlinked trips
Operating costs (2022): $12,194,270
Fleet (2022): 53 vehicles at maximum service

rideCAT
COLLIER AREA TRANSIT

Peer Transit Agency: Breeze Transit (Sarasota County Area Transit), Sarasota, FL
Services provided: Fixed-route bus, trolley, on-demand rideshare, and paratransit services
Service area population (2022): 517,423 people
Service area population density (2022): 848 persons per square mile
Annual revenue hours (2022): 304,917 hours
Annual ridership (2022): 2,080,349 unlinked trips
Operating costs (2022): $27,790,551
Fleet (2022): 107 vehicles at maximum service

Breeze

Peer Transit Agency: LeeTran (Lee County Transit), Fort Myers, FL

Services provided: Fixed-route bus, trolley, ADA paratransit, and transportation disadvantaged services, as well as an employer vanpool program

Service area population (2022): 802,178 people

Service area population density (2022): 978 persons per square mile

Annual revenue hours (2022): 303,204 hours

Annual ridership (2022): 2,231,974 unlinked trips

Operating costs (2022): $28,031,267

Fleet (2022): 91 vehicles at maximum service

Peer Transit Agency: Bayway (Bay County Transportation), Pensacola, FL

Services provided: Fixed-route bus, rideshare, and on-demand services

Service area population (2022): 179,168 people

Service area population density (2022): 236 persons per square mile

Annual revenue hours (2022): 55,418 hours

Annual ridership (2022): 349,281 unlinked trips

Operating costs (2022): $5,098,436

Fleet (2022): 26 vehicles at maximum service

Peer Transit Agency: ECAT (Escambia County Area Transit Authority), Pensacola, FL

Services provided: Fixed-route bus, seasonal trolley, and ADA paratransit services

Service area population (2022): 241,661 people

Service area population density (2022): 1,280 persons per square mile

Annual revenue hours (2022): 156,107 hours

Annual ridership (2022): 842,731 unlinked trips

Operating costs (2022): $13,589,817

Fleet (2022): 86 vehicles at maximum service

Peer Transit Agency: CCRTA (Cape Cod Regional Transit Authority), Hyannis, MA

Services provided: Fixed-route bus, on-demand, ride-hail, seasonal train, reservable medical transportation, and ADA paratransit services

Service area population (2022): 228,996 people

Service area population density (2022): 582 persons per square mile

Annual revenue hours (2022): 178,475 hours

Annual ridership (2022): 605,951 unlinked trips

Operating costs (2022): $17,215,743

Fleet (2022): 133 vehicles at maximum service

Peer Transit Agency: CARTA (Charleston Area Regional Transportation Authority), North Charleston, SC

Services provided: Fixed-route bus, fixed-route shuttle, seasonal shuttle, on-demand, and ADA paratransit services

Service area population (2022): 356,082 people

Service area population density (2022): 2,580 persons per square mile

Annual revenue hours (2022): 230,727 hours

Annual ridership (2022): 2,212,089 unlinked trips

Operating costs (2022): $22,952,085

Fleet (2022): 77 vehicles at maximum service

Peer Transit Agency: Citrus Connection (Lakeland Area Mass Transit District), Lakeland, FL

Services provided: Fixed-route bus, ADA paratransit, and transportation disadvantaged Medicare transportation services

Service area population (2022): 724,777 people

Service area population density (2022): 9,413 persons per square mile

Annual revenue hours (2022): 157,376 hours

Annual ridership (2022): 693,018 unlinked trips

Operating costs (2022): $21,434,610

Fleet (2022): 71 vehicles at maximum service

Peer Transit Agency: The Wave (Cape Fear Public Transportation Authority), Wilmington, NC
Services provided: Fixed-route bus service and mobility assistance program
Service area population (2022): 230,310 people
Service area population density (2022): 1,152 persons per square mile
Annual revenue hours (2022): 102,655 hours
Annual ridership (2022): 710,993 unlinked trips
Operating costs (2022): $8,592,522
Fleet (2022): 43 vehicles at maximum service

Peer Transit Agency: The Wave Transit System, City of Mobile, AL
Services provided: Fixed-route bus service and mobility assistance program
Service area population (2022): 203,900 people
Service area population density (2022): 1,488 persons per square mile
Annual revenue hours (2022): 114,952 hours
Annual ridership (2022): 495,899 unlinked trips
Operating costs (2022): $10,804,979
Fleet (2022): 37 vehicles at maximum service

Peer Transit Agency: PCPT (Pasco County Public Transportation), New Port Richey, FL
Services provided: Fixed-route bus and ADA paratransit services
Service area population (2022): 584,067 people
Service area population density (2022): 782 persons per square mile
Annual revenue hours (2022): 110,773 hours
Annual ridership (2022): 601,717 unlinked trips
Operating costs (2022): $10,599,068
Fleet (2022): 42 vehicles at maximum service

Appendix A – Primary Review Data Values for All Factors and Potential Peers

Indicating Factor Values for Operating Characteristics										
Agency Name	Location	Peer Group	Vehicles Operated in Maximum Service	Annual Passenger Miles Traveled	Annual Vehicle Revenue Miles	Annual Vehicle Revenue Hours	Number of Revenue Vehicles	Total Revenue Miles Operated	Total Operating Expenses	Percent Service Demand Response
CAT(Collier Area Transit)	Naples, FL	Target	53	6,128,249	2,371,843	124,701	73	$ 2,371,843	$ 12,194,270	58%
The M(Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	25	1,567,963	1,382,282	86,390	28	$ 1,382,282	$ 9,987,208	24%
TTA(Tri-State Transit Authority)	Huntington, WV	Previous TDP	33	3,874,462	1,183,447	70,293	55	$ 1,183,447	$ 6,625,367	30%
The Wave Transit System	City of Mobile, AL	Previous TDP	37	3,380,866	1,605,194	114,952	55	$ 1,605,194	$ 10,804,979	46%
ART(Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	19	4,039,338	1,287,477	100,062	33	$ 1,287,477	$ 10,550,615	0%
GCT(Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	54	10,719,532	2,388,912	134,989	92	$ 2,388,912	$ 22,947,660	9%
PCPT(Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	42	3,564,565	1,852,338	110,773	63	$ 1,852,338	$ 10,599,068	40%
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	43	2,108,293	1,505,790	102,655	65	$ 1,505,790	$ 8,592,522	44%
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	107	10,819,212	4,551,933	304,917	150	$ 4,551,933	$ 27,790,551	69%
LeeTran (Lee County Transit)	Fort Myers, FL	New	91	12,768,415	4,756,395	303,204	141	$ 4,756,395	$ 28,031,267	51%
Bayway (Bay County Transportation)	Pensacola, FL	New	26	2,396,995	752,218	55,418	40	$ 2,202,931	$ 13,589,817	48%
GoLine (Indian River County)	Vero Beach, FL	New	27	5,765,570	1,210,921	71,197	37	$ 1,210,921	$ 5,402,008	48%
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	71	4,147,701	2,372,575	157,376	94	$ 2,372,575	$ 21,434,610	42%
CARTA(Charleston Area Regional Transportation Authority)	North Charleston, SC	New	77	11,394,692	3,152,002	230,727	134	$ 3,152,002	$ 22,952,085	26%
ECAT(Escambia County Area Transit Authority)	Pensacola, FL	New	86	4,610,071	2,202,931	156,107	90	$ 2,202,931	$ 13,589,817	48%
CCRTA(Cape Cod Regional Transit Authority)	Hyannis, MA	New	133	7,170,207	2,826,345	178,475	192	$ 2,826,345	$ 17,215,743	59%
GTA(Greensboro Transit Authority)	City of Greensboro, NC	New	76	9,159,005	3,695,161	257,346	104	$ 3,695,161	$ 27,555,354	0%

Indicating Factor Values for Exogenous Variables								
Agency Name	Location	Peer Group	Service Area	Urban Area Population	Population Density	Population Growth Rate	Service area population	Service area density
CAT (Collier Area Transit)	Naples, FL	Target	2,025	449,527	1,850	5.60%	348,902	172
The M (Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	135	251,158	1,731	-1.25%	205,764	1,524
TTA (Tri-State Transit Authority)	Huntington, WV	Previous TDP	92	202,754	1,573	1.30%	144,339	1,569
The Wave Transit System	City of Mobile, AL	Previous TDP	137	320,855	1,453	-0.33%	203,900	1,488
ART (Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	45	294,013	1,183	2.88%	93,350	2,074
GCT (Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	143	5,180,179	2,029	1.57%	702,116	4,910
PCPT (Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	747	2,861,173	2,953	2.81%	584,067	782
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	200	268,625	1,888	5.21%	230,310	1,152
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	610	825,572	2,042	5.97%	517,423	848
LeeTran (Lee County Transit)	Fort Myers, FL	New	820	654,405	1,972	9.21%	802,178	978
Bayway (Bay County Transportation)	Pensacola, FL	New	758	398,813	1,519	2.21%	179,168	236
GoLine (Indian River County)	Vero Beach, FL	New	217	186,637	1,759	7.01%	163,662	754
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	77	280,346	1,921	0.87%	724,777	9,413
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	New	138	706,884	2,085	3.23%	356,082	2,580
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	New	189	398,813	1,519	2.21%	241,661	1,280
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	New	394	313,064	917	3.23%	228,996	582
GTA (Greensboro Transit Authority)	City of Greensboro, NC	New	136	338,928	2,050	2.42%	297,878	2,190

Appendix B – Primary Review Likeness Scores for All Factors and Potential Peers

Likeness Score for Operating Characteristics											
Agency Name	Location	Peer Group	Vehicles Operated in Maximum Service	Annual Passenger Miles Traveled	Annual Vehicle Revenue Miles	Annual Vehicle Revenue Hours	Number of Revenue Vehicles	Total Revenue Miles Operated	Total Operating Expenses	Percent Service Demand Response	Average Operational Likeness Score	Total Operational Likeness Score
CAT(Collier Area Transit)	Naples, FL	Target	0	0	0	0	0	0	0	0	0	0
The M(Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	0.53	0.74	0.42	0.86	0.62	0.42	0.11	0.59	0.53	2.59
TTA(Tri-State Transit Authority)	Huntington, WV	Previous TDP	0.38	0.37	0.50	0.82	0.25	0.50	0.37	0.48	0.46	2.93
The Wave Transit System	City of Mobile, AL	Previous TDP	0.30	0.45	0.32	0.89	0.25	0.32	0.05	0.21	0.35	2.04
ART(Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	0.64	0.34	0.46	0.88	0.55	0.46	0.13	1.00	0.56	3.47
GCT(Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	0.02	0.43	0.01	0.91	0.21	0.01	0.47	0.85	0.36	2.44
PCPT(Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	0.21	0.42	0.22	0.89	0.14	0.22	0.01	0.31	0.30	1.78
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	0.19	0.66	0.37	0.88	0.11	0.37	0.28	0.24	0.39	1.87
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	0.50	0.43	0.48	0.59	0.51	0.48	0.57	0.16	0.47	3.72
LeeTran (Lee County Transit)	Fort Myers, FL	New	0.42	0.52	0.50	0.59	0.48	0.50	0.60	0.12	0.47	3.73
Bayway (Bay County Transportation)	Pensacola, FL	New	0.51	0.61	0.68	0.56	0.45	0.07	0.11	0.17	0.39	3.16
GoLine (Indian River County)	Vero Beach, FL	New	0.49	0.06	0.49	0.43	0.49	0.49	0.56	0.17	0.40	3.18
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	0.25	0.32	0.00	0.21	0.22	0.00	0.50	0.28	0.22	1.78
CARTA(Charleston Area Regional Transportation Authority)	North Charleston, SC	New	0.31	0.46	0.25	0.46	0.46	0.25	0.47	0.55	0.40	3.21
ECAT(Escambia County Area Transit Authority)	Pensacola, FL	New	0.38	0.25	0.07	0.20	0.19	0.07	0.17	0.17	0.19	1.50
CCRTA(Cape Cod Regional Transit Authority)	Hyannis, MA	New	0.60	0.15	0.16	0.30	0.62	0.16	0.30	0.02	0.29	2.30
GTA(Greensboro Transit Authority)	City of Greensboro, NC	New	0.30	0.33	0.36	0.52	0.30	0.36	0.06	1.00	0.40	3.22

Likeness Score for Exogenous Variables

Agency Name	Location	Peer Group	Service Area	Urban Area Population	Population Density	Population Growth Rate	Service area population	Service area density	Average Exogenous Likeness Score	Total Exogenous Likeness Score
CAT(Collier Area Transit)	Naples, FL	Target	0	0	0	0	0	0	0	0
The M(Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	0.93	0.44	0.06	1.22	0.41	0.89	0.66	3.96
TTA(Tri-State Transit Authority)	Huntington, WV	Previous TDP	0.95	0.55	0.15	0.77	0.59	0.89	0.65	3.90
The Wave Transit System	City of Mobile, AL	Previous TDP	0.93	0.29	0.21	1.06	0.42	0.88	0.63	3.79
ART(Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	0.98	0.35	0.36	0.49	0.73	0.92	0.64	3.82
GCT(Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	0.93	0.91	0.09	0.72	0.50	0.96	0.69	4.12
PCPT(Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	0.63	0.84	0.37	0.50	0.40	0.78	0.59	3.53
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	0.90	0.40	0.02	0.07	0.34	0.85	0.43	2.58
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	0.70	0.46	0.09	0.06	0.33	0.80	0.41	2.43
LeeTran (Lee County Transit)	Fort Myers, FL	New	0.60	0.31	0.06	0.39	0.56	0.82	0.46	2.75
Bayway (Bay County Transportation)	Pensacola, FL	New	0.63	0.11	0.18	0.61	0.49	0.27	0.38	2.28
GoLine (Indian River County)	Vero Beach, FL	New	0.89	0.58	0.05	0.21	0.53	0.77	0.51	3.04
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	0.96	0.38	0.04	0.85	0.52	0.98	0.62	3.72
CARTA(Charleston Area Regional Transportation Authority)	North Charleston, SC	New	0.93	0.36	0.11	0.42	0.02	0.93	0.46	2.79
ECAT(Escambia County Area Transit Authority)	Pensacola, FL	New	0.91	0.11	0.18	0.61	0.31	0.87	0.50	2.98
CCRTA(Cape Cod Regional Transit Authority)	Hyannis, MA	New	0.81	0.30	0.50	0.42	0.34	0.70	0.51	3.09
GTA(Greensboro Transit Authority)	City of Greensboro, NC	New	0.93	0.25	0.10	0.57	0.15	0.92	0.48	2.91



Agency Name	Location	Peer Group	Average Operational Likeness Score	Sum of Operational Likeness Scores	Average of Operational Sum by Peer Group	Average Exogenous Likeness Score	Sum of Exogenous Likeness Scores	Average of Exogenous Sum by Peer Group	Average Likeness Score for All Factors	Total Sum of Likeness Score for All Factors	Average of Total Sum by Peer Group
CAT(Collier Area Transit)	Naples, FL	Target	0	0	0	0	0	0	0	0	0
The M(Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	0.53	2.59		0.66	3.96		0.59	8.24	
TTA(Tri-State Transit Authority)	Huntington, WV	Previous TDP	0.46	2.93		0.65	3.90		0.54	7.57	
The Wave Transit System	City of Mobile, AL	Previous TDP	0.35	2.04		0.63	3.79		0.47	6.59	
ART(Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	0.56	3.47	2.45	0.64	3.82	3.67	0.59	8.27	7.04
GCT(Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	0.36	2.44		0.69	4.12		0.50	7.01	
PCPT(Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	0.30	1.78		0.59	3.53		0.42	5.94	
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	0.39	1.87		0.43	2.58		0.40	5.67	
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	0.47	3.72		0.41	2.43		0.44	6.16	
LeeTran (Lee County Transit)	Fort Myers, FL	New	0.47	3.73		0.46	2.75		0.46	6.48	
Bayway (Bay County Transportation)	Pensacola, FL	New	0.39	3.16		0.38	2.28		0.39	5.44	
GoLine (Indian River County)	Vero Beach, FL	New	0.40	3.18		0.51	3.04		0.44	6.22	
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	0.22	1.78	2.87	0.62	3.72	2.89	0.39	5.51	5.75
CARTA(Charleston Area Regional Transportation Authority)	North Charleston, SC	New	0.40	3.21		0.46	2.79		0.43	5.99	
ECAT(Escambia County Area Transit Authority)	Pensacola, FL	New	0.19	1.50		0.50	2.98		0.32	4.48	
CCRTA(Cape Cod Regional Transit Authority)	Hyannis, MA	New	0.29	2.30		0.51	3.09		0.38	5.39	
GTA(Greensboro Transit Authority)	City of Greensboro, NC	New	0.40	3.22		0.48	2.91		0.44	6.13	

Situational Appraisal
Technical Memo No. 1

Date: **July 1, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: **Situational Appraisal – Technical Memo No. 1 - Action Required**

Your review of the initial Situational Appraisal is requested.

The organization of this document presents an outline of the content to be included in the final draft of the TDP. As such, there are areas where additional data and analysis are still in development. Those areas are noted and will be updated as the document develops. An example of this can be found in the peer analysis section. The peer analysis was initiated to identify comparable transit agencies that share similar conditions and serve as a good peer to mirror. The value of peer analysis is to measure operating effectiveness and to provide aspirational direction. CAT however has some unique attributes that will require further evaluation and discussion. This is noted in this document.

This document contains a snapshot of CAT performance based on NTD data and other source material. Review of this information and other conditions should be reviewed as a starting point for the TDP.

We look forward to discussing this more.

Table of Contents

1 BASELINE CONDITIONS 1
1.1 Study Area 2
1.2 Population Profile 3
1.3 Demographic Characteristics 11
1.4 Transportation Disadvantaged Population 15
1.4.1 Recent Improvements to Paratransit Services 18
1.5 Labor and Employment Characteristics 18
1.6 Educational Attainment 23
1.7 Tourism 24
1.8 Major Trip Generators 26
1.9 Major Developments 29
1.10 Existing and Future Land Use 31
1.11 Commuter Travel Patterns 35
1.12 Roadway Conditions 36

2 TRANSIT PERFORMANCE 36
2.1 Existing Transit Services 36
2.1.1 Fixed route services 36
2.1.2 Paratransit Services 39
2.1.3 Technology Solutions 40
2.1.4 Fare Structure 40
2.1.5 Transit Facilities 41
2.1.6 Vehicle Inventory 43
2.1.7 Safety 44
2.1.8 On-Board Surveys 44
2.1.9 Placeholder for private bus discussion 45
2.2 Comprehensive Operations Analysis 2021 - Recap 45
2.3 Transit Usage 46
2.3.1 Route Ridership by month 46
2.3.2 Route Productivity 51
2.4 Trend and Peer Comparison Analysis 51
2.4.1 Performance Measures 54
2.4.2 Effectiveness Measures 58
2.4.3 Efficiency Measures 60
2.4.4 Key Findings 64

LIST OF TABLES

Table 1-1: Collier County Demographic Characteristics 12
Table 1-2: Forecasted Collier County transportation disadvantaged population. 16
Table 1-3: Collier County transportation disadvantaged trips served 16
Table 1-4: Top Employers in Collier County in 2023 27
Table 1-5: Top Ten Planned Unit Developments in Collier County by Area 30
Table 1-6: Future Land Use in Collier County 34
Table 1-7: Journey-to-Work Characteristics 35
Table 2-1: Existing Fixed-Route Services in Collier County 37
Table 2-2: Fare Structure in Collier County (2024) 41
Table 2-3: CAT Vehicle Inventory 2024 43
Table 2-4: System Performance Review Measures 52
Table 2-5: Transit System Peer Review Selection 53

LIST OF FIGURES

Figure 1-1: Map of Study Area 2
Figure 1-2: Population totals, estimates, and projections for Collier County (Source: US Census Bureau population estimates and BEBR population projections). 3
Figure 1-3: Historical and Projected Decennial Population Growth Rates 4
Figure 1-4: Collier County year by year population projections. 5
Figure 1-5: Estimated Population Density in Collier County in 2024 6
Figure 1-6: Estimated Population Density in Collier County in 2035 7
Figure 1-7: Population Growth Between Estimated Population Densities from 2024 to 2035 8
Figure 1-8: Estimates for Number of Dwelling Units in Collier County in 2024. 9
Figure 1-9: Estimates for Number of Dwelling Units in Collier County in 2035. 10
Figure 1-10: Dwelling Unit Increase Between Estimated Number of Dwelling Units from 2024 to 2035 11
Figure 1-11: Household Income Over Time in Collier County 13
Figure 1-12: Population Age Distribution in Collier County 14
Figure 1-13: Distribution of Households with No Vehicle in Collier County in 2022. 15
Figure 1-14: Collier County transportation disadvantaged trips, 2019–2023 (Source: Florida Commission for the Transportation Disadvantaged Annual Operations Reports (AOR)) 17
Figure 1-15: Ratio of TD Trips to Total Population 18
Figure 1-16: Collier County Employment Distribution 2024 19
Figure 1-17: Collier County Employment Distribution 2035 20
Figure 1-18: Employment Growth Between Estimated Employment Densities from 2024 to 2035 21
Figure 1-19: Collier County Labor Force Distribution by Service Area, 2010, 2020, and 2022 22
Figure 1-20: National, State and County Unemployment 23
Figure 1-21: Educational Attainment in Collier County 24
Figure 1-22: Transit Access to Point of Interest Destinations in Collier County 25
Figure 1-23: Density Map of Point of Interest Destinations by TAZ 26
Figure 1-24: Transit Access to Top Employers in Collier County in 2023 28
Figure 1-25: Density Map of Top Employer Locations by TAZ 29
Figure 1-26: Status of Planned Unit Developments in Collier County 30
Figure 1-27: Existing Land Use Zoning Areas in Collier County 31
Figure 1-28: Future Land Use Designation in Collier County as of 2024 33
Figure 2-1: Existing CAT Services 38
Figure 2-2: Paratransit Ridership 39
Figure 2-3: CAT Radio Road Transit Facility (Source: Google Street View) 42
Figure 2-4: Intermodal Transfer Station (Source: Google Street View) 42
Figure 2-5: Total Monthly Ridership in Collier County during FY2023 46
Figure 2-6: Total Passengers per Route in Collier County during FY2023 47
Figure 2-7: Passengers per Revenue Hour in Collier County during FY2023 48
Figure 2-8: Seasonal Variation of Average Monthly Ridership 49
Figure 2-9: Top Ridership Routes in Collier County in FY2023 50
Figure 2-10: Average Monthly Ridership of Top Ridership Routes in Collier County in FY2023 51
Figure 2-11 Unlinked Passenger Trips trend 54
Figure 2-12 Passenger Miles Travel trend 55
Figure 2-13 Vehicle Revenue Miles trend 55
Figure 2-14 Vehicle Revenue Hours trend 56
Figure 2-15 Vehicles Operating in Maximum Service trend 57
Figure 2-16 Vehicles Available in Maximum Service trend 57
Figure 2-17 Operating Expense trend 57
Figure 2-18 Fare Revenue trend 58
Figure 2-19 Unlinked Passenger Trips per Capita trend 58
Figure 2-20 Passenger Miles Travelled per Capita trend 59
Figure 2-21 Vehicle Revenue Miles per capita trend 59
Figure 2-22 Unlinked Passenger Trips per Vehicle Revenue Mile trend 60
Figure 2-23 Unlinked Passenger Trips per Vehicle Revenue Hour 60
Figure 2-24 Operating Expense per Capita trend 61
Figure 2-25 Operating Expense per Unlinked Passenger Trip trend 61

Figure 2-26 Operating Expense per Passenger Mile Travelled trend 62
Figure 2-27 Operating Expense per Vehicle Revenue Mile trend 62
Figure 2-28 Operating Expense per Vehicle Revenue Hour trend 63
Figure 2-29 Vehicle Revenue Miles per Vehicle trend 63
Figure 2-30 Farebox Recovery ratio trend 64
Figure 2-31 Average Fare trend 64

1 Baseline Conditions

The baseline conditions analysis provides a detailed report on the existing and projected future conditions of the service area. The foundation of the transportation development plan will be based on the contextual information presented in this section. The collected data will also be used in the Situational Appraisal to provide the basis for transit improvement considerations.

The following topics were reviewed and analyzed for Collier County in the context of the TDP:

- Study Area
- Population Profile
- Demographic Characteristics
- Transportation Disadvantaged Population
- Labor and Employment Characteristics
- Educational Attainment
- Tourism
- Major Trip Generators
- Major Developments
- Existing and Future Land Use
- Commuter Travel Patterns
- Roadway Conditions

Data collected for select population, demographic, and socioeconomic characteristics are supported by various maps and tables. Primary data sources include the U.S. Census Bureau, specifically from the 2020 Decennial Census and the 5-Year American Community Survey (ACS), Collier County, Florida Commission for the Transportation Disadvantaged, Collier Area Transit, and the Regional Economic Research Institute at Florida Gulf Coast University, supplemented by local and regional agency sources as necessary.

1.1 Study Area

Collier County is in southwest Florida, east of the Gulf of Mexico. The county is bordered on the northwest, northeast, east, south, respectively by Lee, Hendry, Broward, Miami-Dade, and Monroe counties. Collier County has three municipalities: Everglades City, Marco Island, and Naples, the County seat.

In terms of geographical area, Collier County is the largest county in Florida with a land area of approximately 1,996.8 square miles.[1] A significant portion of the county area is designated as protected lands (more than 1,875 square miles), primarily in the eastern and southern parts of the county.

Figure 1-1 shows the extent of the study area. Due to the size of Collier County, a study area has been produced as outlined by the red boundary, which covers the existing transit network along with the core populated areas of the County and excludes some of the park land. For presentation purposes moving forward in this document, some of the map figures will be zoomed to the study area extent to show greater detail and avoid wasted space.

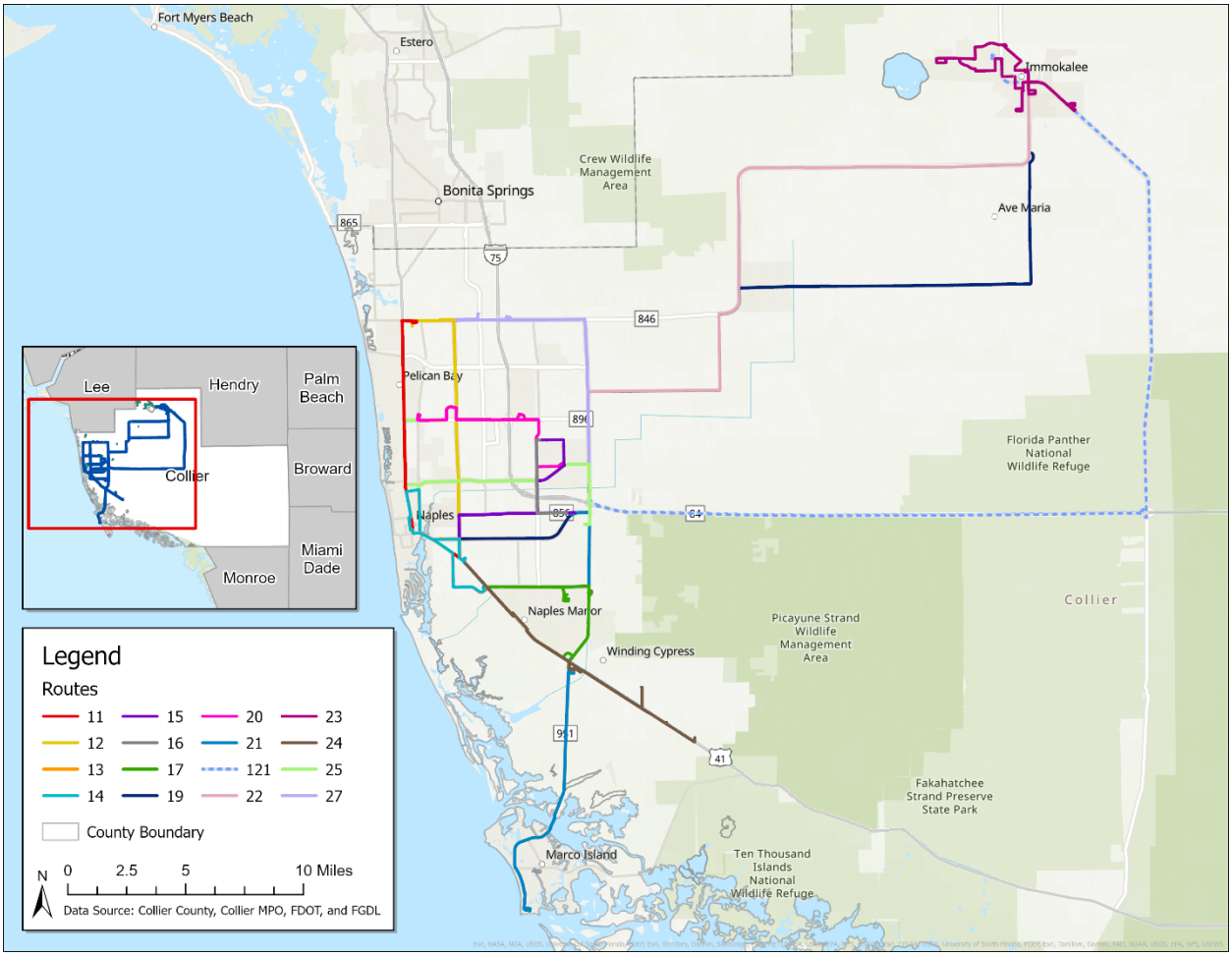


Figure 1-1: Map of Study Area

[1] US Census Bureau 2020 Decennial Census.

1.2 Population Profile

As of the 2020 Decennial Census, Collier County was ranked the 19th most populous county in Florida. As per the US Census Bureau 2020 Decennial Census, the county population accounts for 1.74% of the total state population in 2020 and is estimated to grow to 1.83% by 2050 based on State population projections.[2]

The Collier County population has been steadily increasing over the last few decades, as shown in Figure 1-2 below. There was a slight dip in the census population count in 2020 compared to the projected values for the previous years, likely due to the COVID-19 pandemic. Collier County's population is projected to continue increasing steadily.

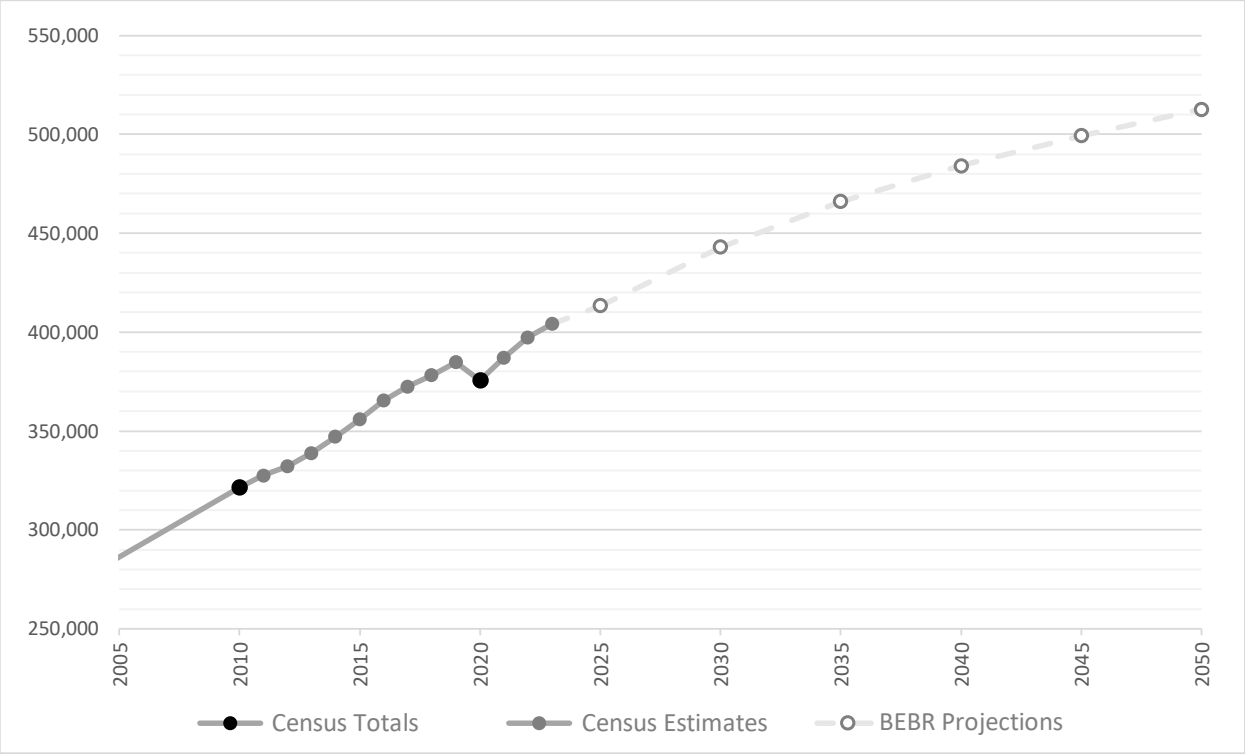


Figure 1-2: Population totals, estimates, and projections for Collier County (Source: US Census Bureau population estimates and BEBR population projections).

[2] US Census Bureau 2020 Decennial Census.

Collier County's population has been increasing during the past few decades; however, the overall growth rate is expected to slow over the next couple of decades, like state-wide conditions. In general, the county has consistently experienced and will continue to have higher rates of growth compared to that of Florida, as shown in Figure 1-3 below.

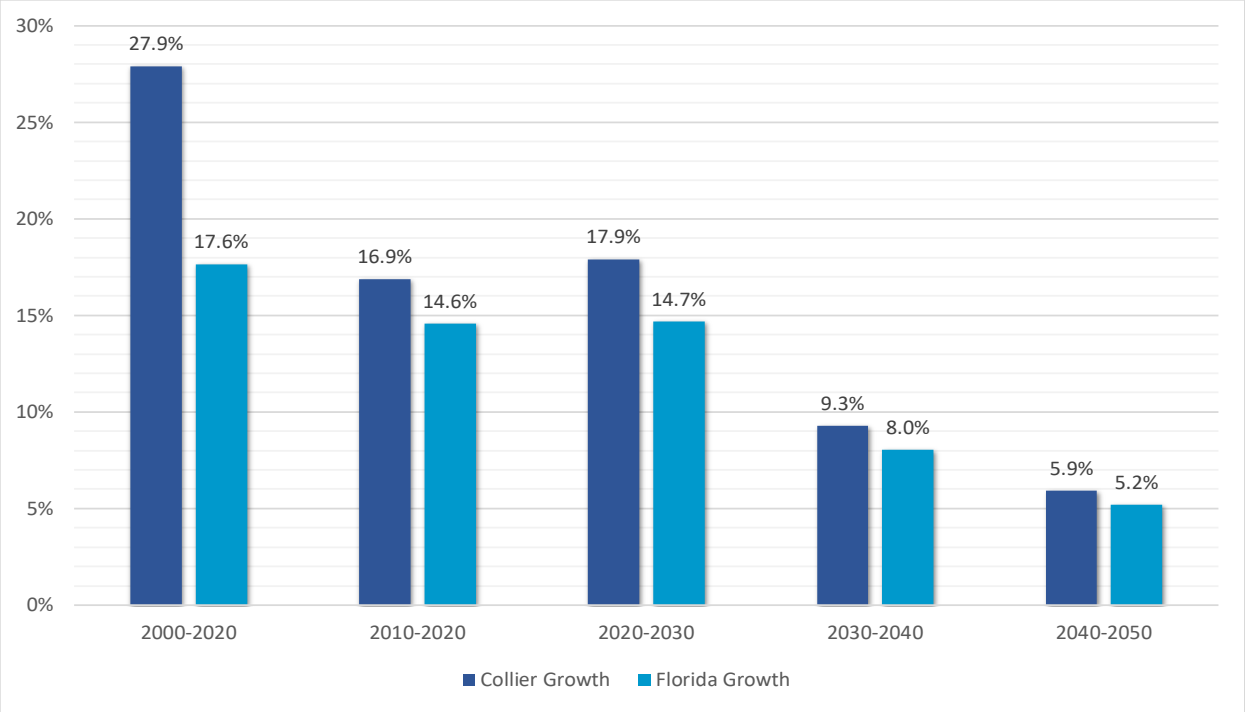


Figure 1-3: Historical and Projected Decennial Population Growth Rates

Collier County typically receives a significant number of tourists and seasonal residents, impacting the travel patterns and increasing traffic congestion during the peak season periods. The County developed annual population projections for the fiscal year and peak season periods to better plan for seasonal demand impact on public services. Figure 1-4 displays these projection values; with annual fiscal year population values reflecting the permanent resident population and peak season population values estimated with a constant adjustment factor.

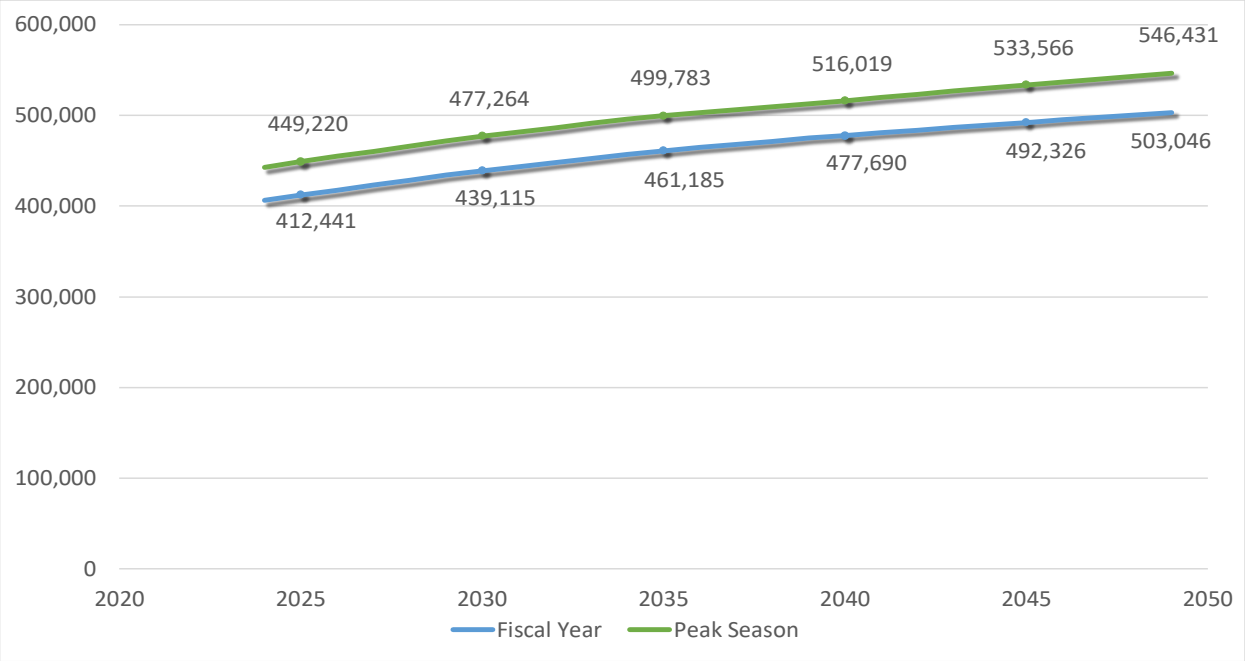


Figure 1-4: Collier County year by year population projections.

Traffic Analysis Zones (TAZ) were used to analyze statistics and change at a smaller geographic unit. Estimated population, employment, and dwelling density values for 2024 and 2035 were interpolated from 2015 values and 2045 projections. Employment will be discussed in a later section.

Figure 1-5 and Figure 1-6 depict the population densities at the TAZ level for 2024 and 2035 respectively. The estimated population distribution of Collier County in 2024 is highly concentrated in the central business and residential districts of Naples, Naples Manor, Immokalee, Pelican Bay, Ave Maria, Winding Cypress, and Marco Island. The distribution pattern remains very similar for the 2035 estimated projections. The areas with higher population values are all located near, if not along, the existing transit network, which means that the current network is doing well in providing service in the more populated areas.

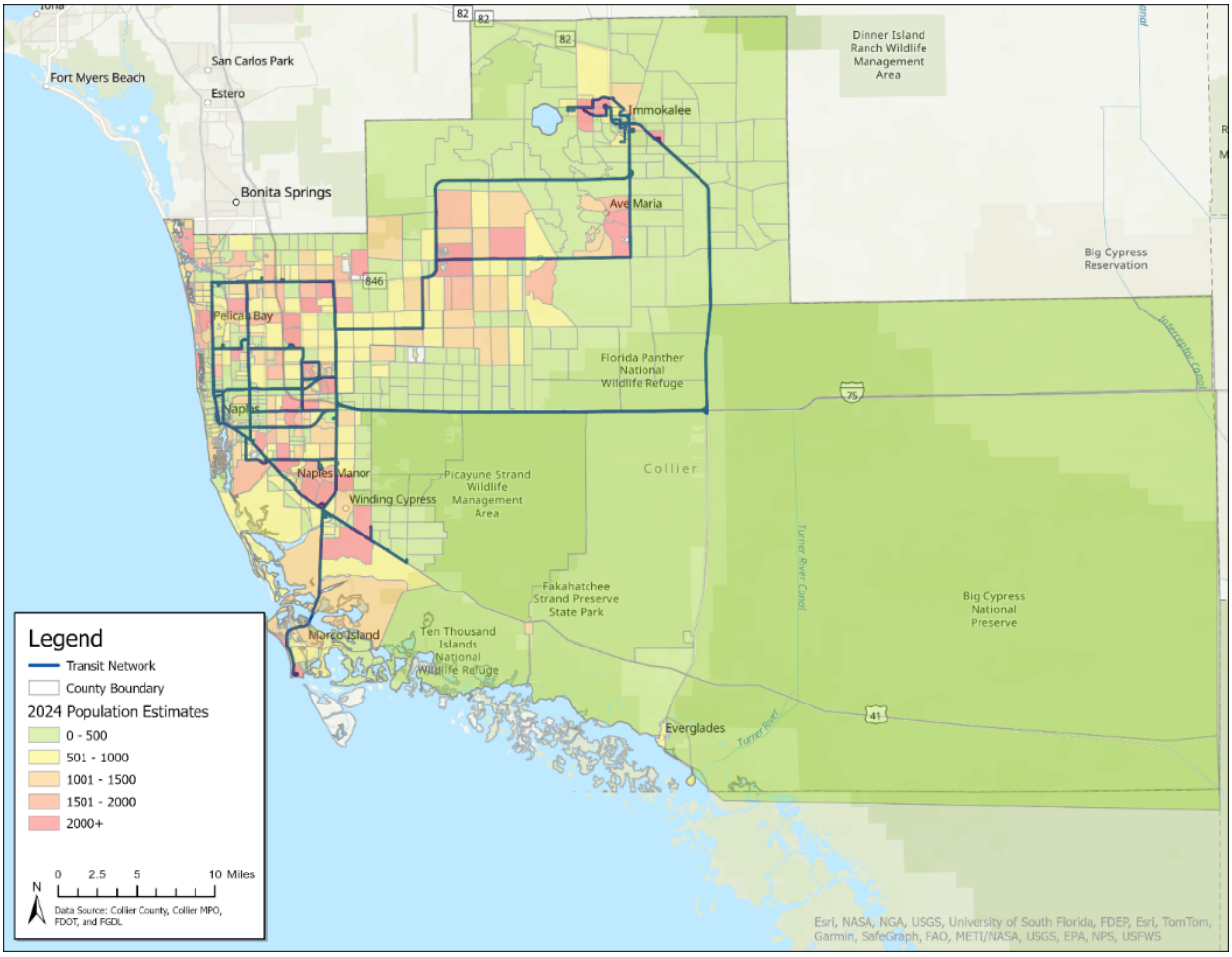


Figure 1-5: Estimated Population Density in Collier County in 2024

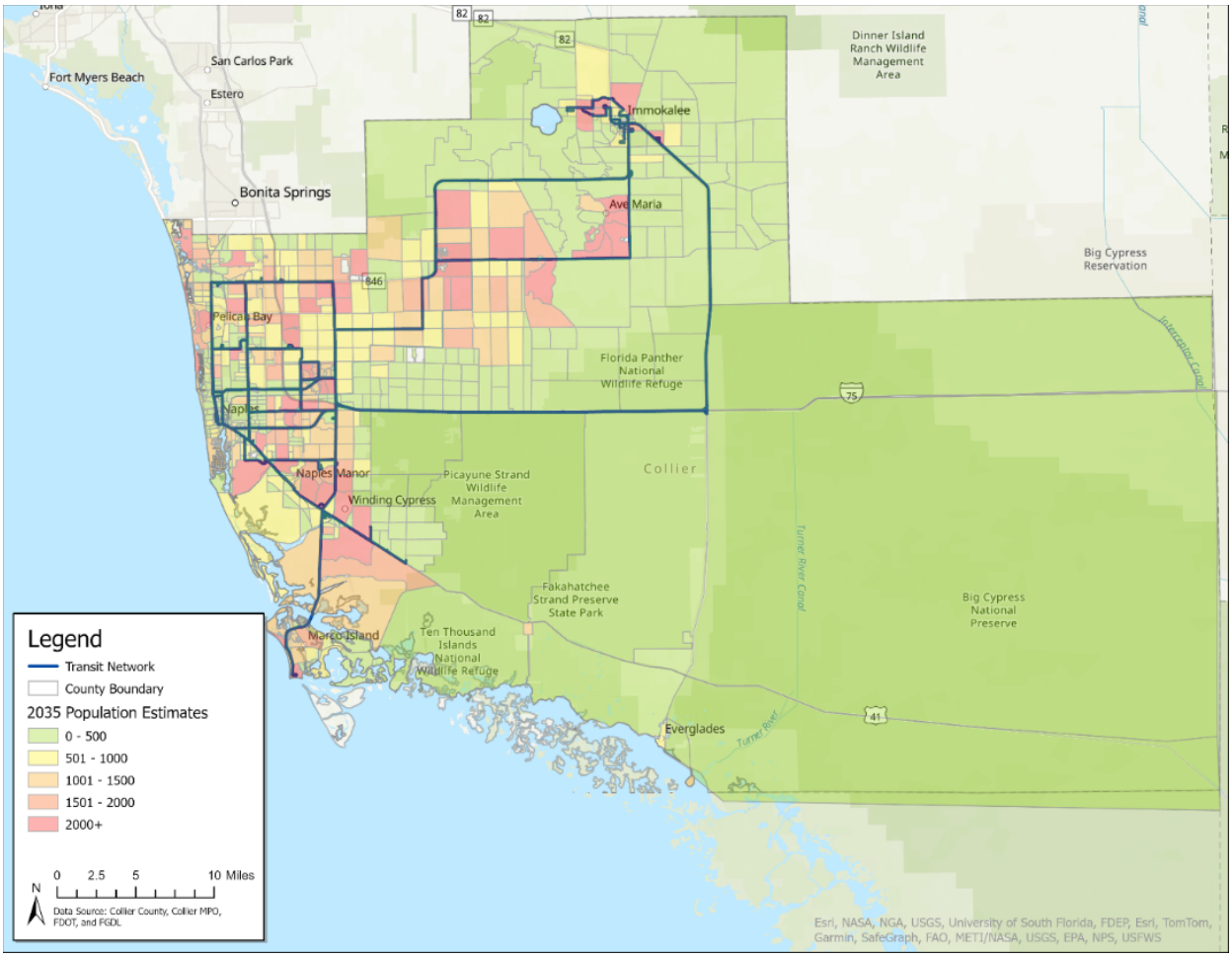


Figure 1-6: Estimated Population Density in Collier County in 2035

Figure 1-7 shows the population growth increase between the 2024 and 2035 population estimates. This growth change map indicates high growth rates for the TAZs within and around the urban communities of Naples Manor, Marco Island, Immokalee, Ave Maria, and Orangetree (west of Ave Maria). Orangetree specifically is surrounded by a significant number of TAZs with population growth rates greater than 100 people, depicted in red in the map. These areas of high growth indicate potential for more transit demand as the population increases. The agricultural areas next to these communities appear to have little to no growth or even decreasing population, specifically outside of Immokalee and in the parks or nature reserves, which is expected as there are limited residential areas and less dwelling units there.

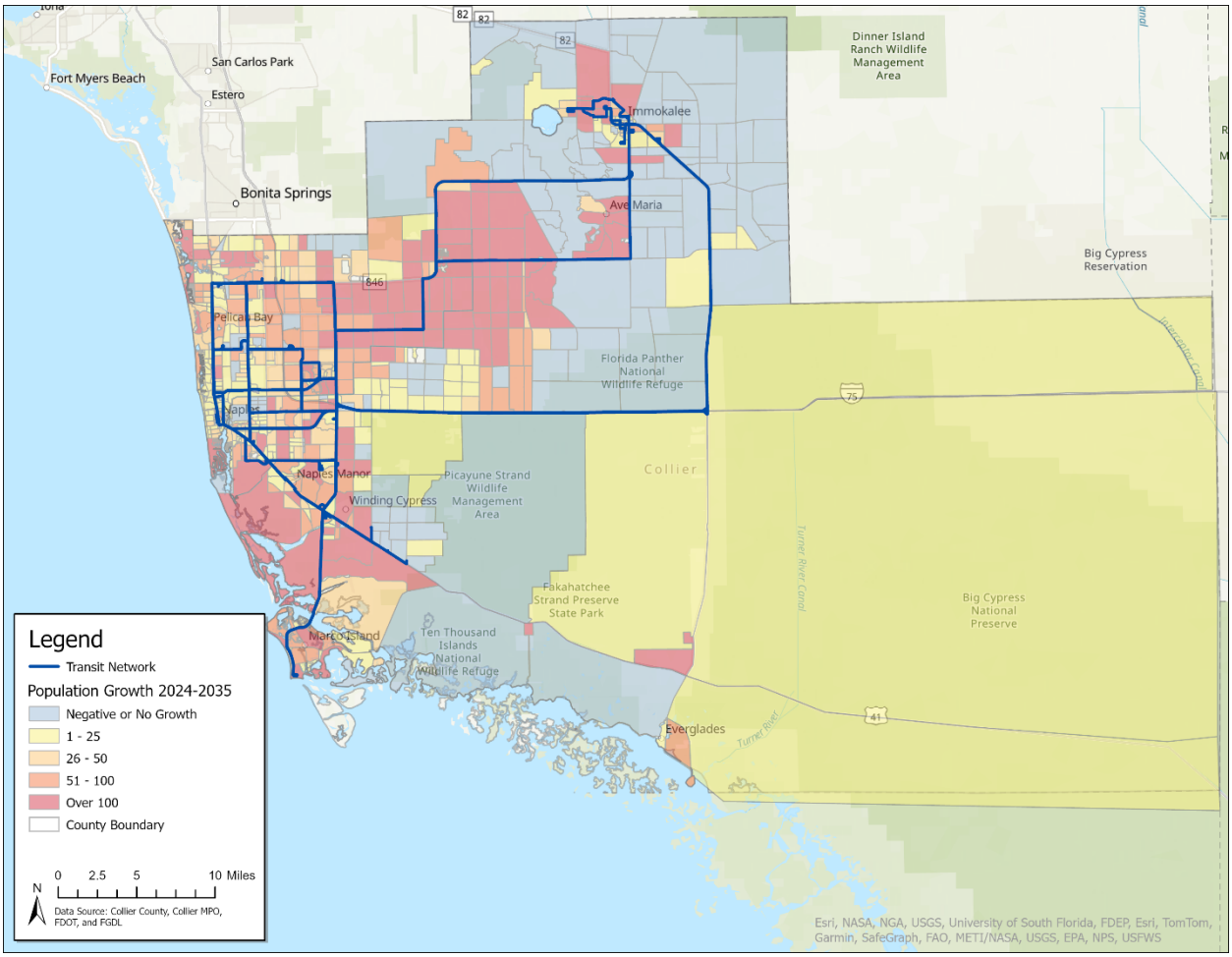


Figure 1-7: Population Growth Between Estimated Population Densities from 2024 to 2035

Figure 1-8 and Figure 1-9 illustrate the dwelling unit densities at the TAZ level for 2024 and 2035 respectively. Like the population distribution in Collier County, high dwelling unit densities are seen in and around Naples Manor, Pelican Bay, Marco Island, Ave Maria, and Immokalee, indicating greater resident occupancy and transit demand in these regions. Higher dwelling unit densities are also observed along the Gulf of Mexico coast along the west end of Collier County. This distribution pattern remains very similar for the 2035 estimated projections. Again, following population density patterns, areas with higher numbers of dwelling units are all located near, if not along, the existing transit network, indicating that the current network is doing well in providing service in the more populous residential areas.

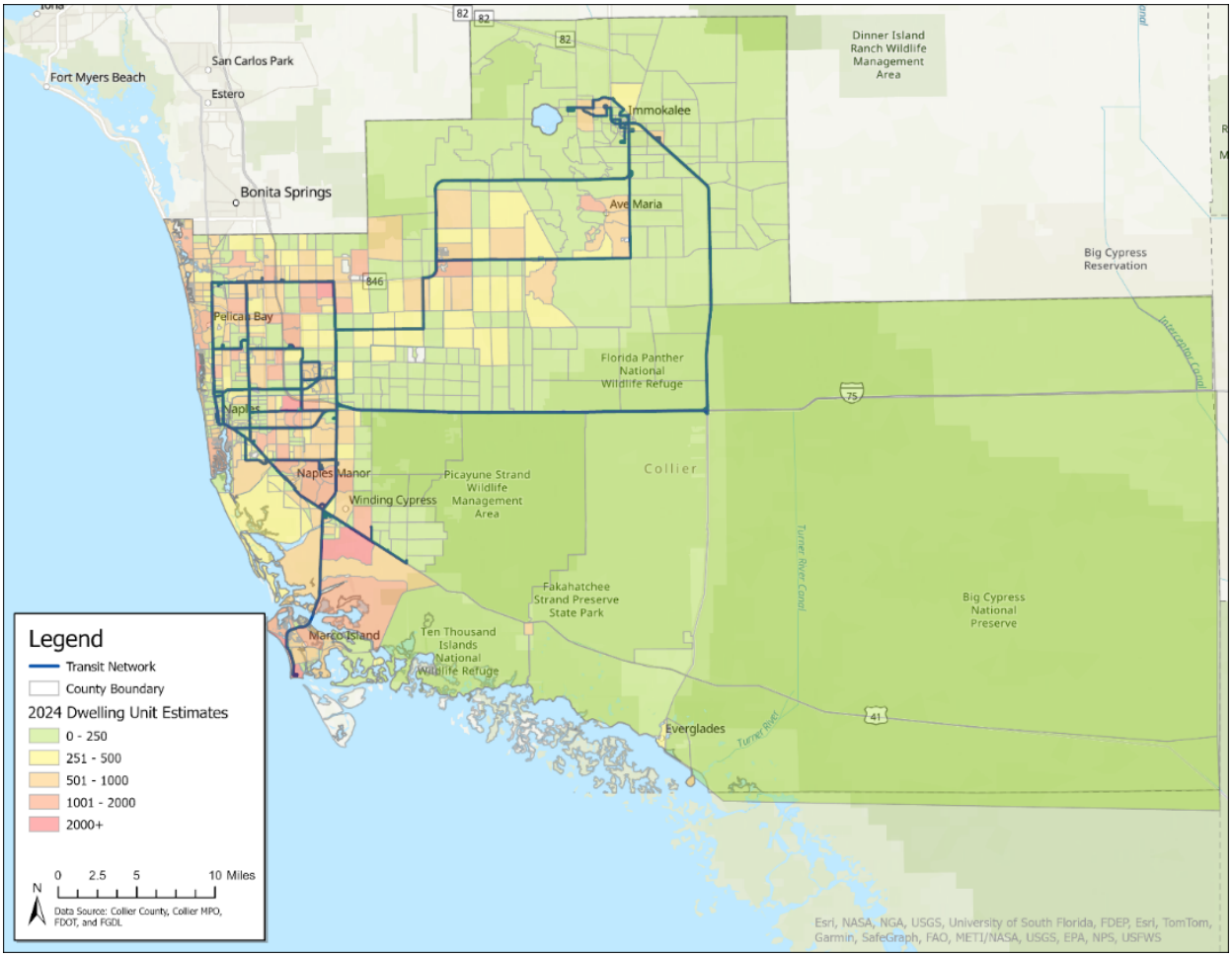


Figure 1-8: Estimates for Number of Dwelling Units in Collier County in 2024.

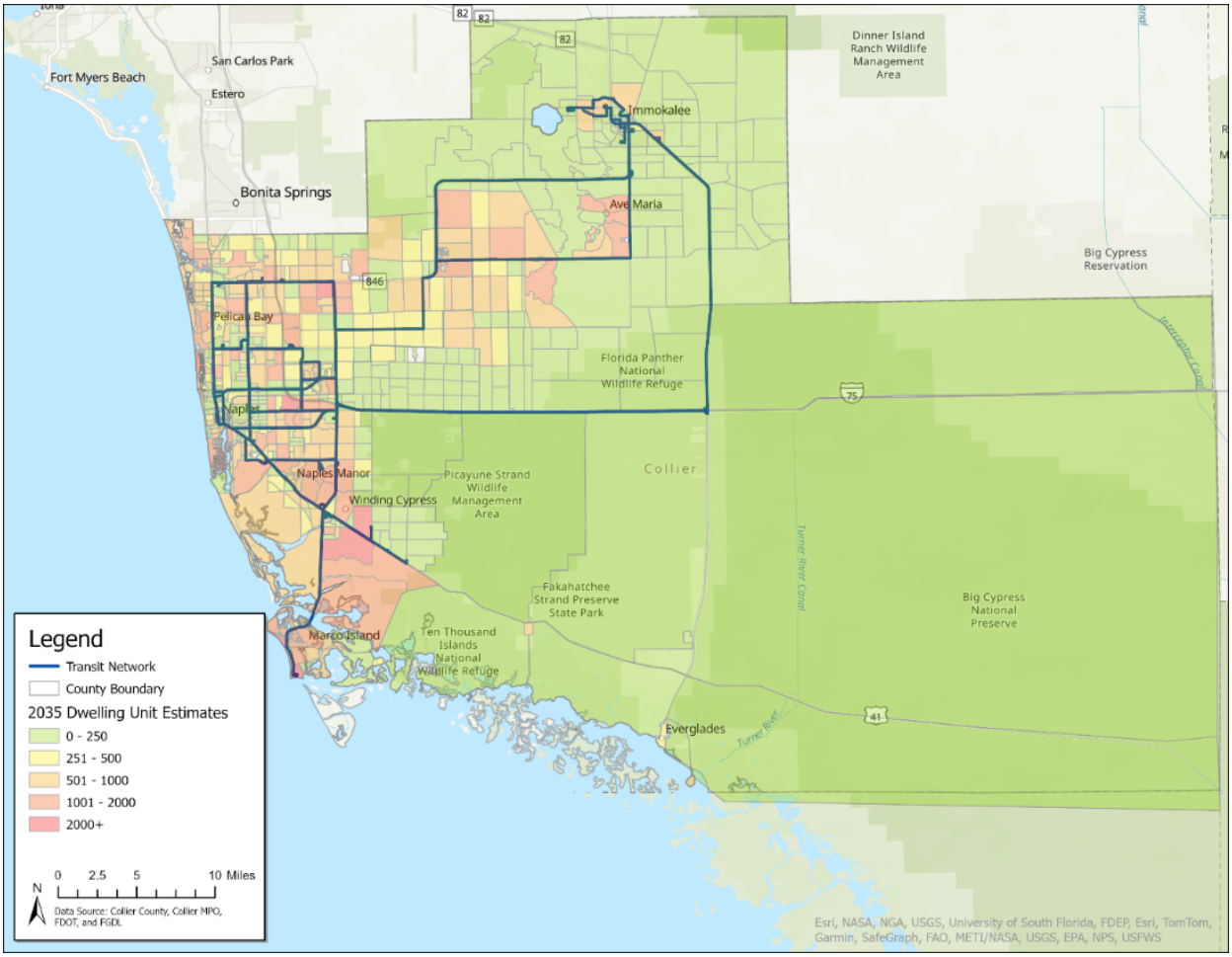


Figure 1-9: Estimates for Number of Dwelling Units in Collier County in 2035.

Figure 1-10 shows the increase in dwelling units between the 2024 and 2035 estimates. This growth change map indicates high growth rates for the TAZs within and around the urban communities of Naples Manor, Marco Island, Immokalee, Ave Maria, and Orangetree (west of Ave Maria). Orangetree specifically has a large number of TAZs with dwelling unit increases of more than 50 units, depicted in orange and red in the map. The areas with high increases in dwelling units are in line with the planned unit development areas in Figure 1-26 shown in a later section. As with population growth, the agricultural areas next to these communities appear to have little to no increase or even a decrease in dwelling units, specifically outside of Immokalee and in the parks or nature reserves, which is expected as there are limited residential areas and less dwelling units there.

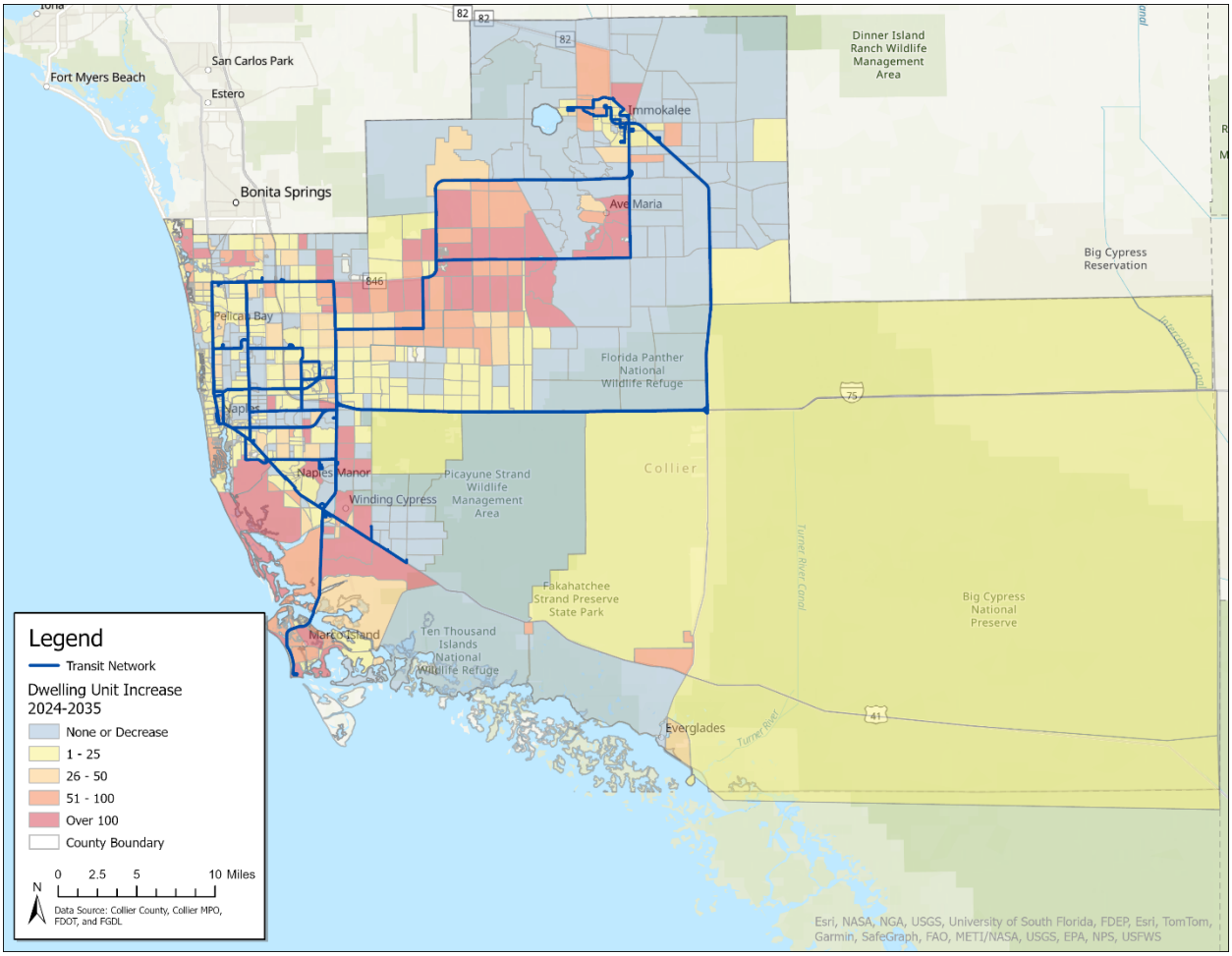


Figure 1-10: Dwelling Unit Increase Between Estimated Number of Dwelling Units from 2024 to 2035

1.3 Demographic Characteristics

Demographic characteristics such as age, household income, poverty status and the number of vehicles available in a household are key indicators to helping understand transit propensity. Table 1-1 summarizes these characteristics pulled from data from the United States Census Bureau in the years of 2010, 2018, 2020 and 2022.

Table 1-1: Collier County Demographic Characteristics

Characteristic	2010	2018	2020	2022
Gender				
Male	49.7%	49.3%	49.2%	49.5%
Female	50.3%	50.7%	50.8%	50.5%
Ethnic Origin				
White	85.8%	88.1%	84.5%	73.2%
Black or African American	6.6%	7.0%	6.8%	6.5%
Other	6.4%	3.6%	3.6%	5.6%
Two or more races	1.1%	1.3%	5.2%	14.6%
Hispanic Origin				
Not of Hispanic/Latino origin	74.8%	72.5%	72.0%	71.4%
Hispanic or Latino origin	25.2%	27.5%	28.0%	28.6%
Age				
<15 years	20.0%	18.8%	18.6%	18.2%
15-59 years	62.1%	59.9%	59.1%	59.8%
60+ years	17.9%	21.3%	22.3%	22.0%
Household Income				
Under $10,000	7.2%	6.3%	5.8%	4.9%
$10,000-$49,999	40.9%	35.8%	33.2%	28.9%
$50,000 or more	51.9%	57.9%	61.0%	66.2%
Poverty Status				
Above poverty level	86.2%	85.9%	87.2%	87.5%
Below poverty level	13.8%	14.1%	12.8%	12.5%
Vehicle Available in Household				
None	4.3%	4.3%	4.2%	4.3%
One	21.1%	20.6%	20.1%	20.3%
Two	42.5%	41.0%	40.5%	40.3%
Three or more	32.1%	34.1%	35.2%	35.2%

Source: 2010 ACS 5-year estimates, 2018 ACS 5-year estimates, 2020 ACS 5-year estimates, 2022 ACS 5-year estimates

A significant portion of the population owns two or more vehicles, and many individuals have an annual income exceeding $50,000. Combined, these statistics may indicate a lower propensity to use transit among the community. Household income reveals an increasing disparity between the rich and poor, as those earning over $50,000 have increased from 52% to 66%, while those earning under $10,000 have only decreased by 2%. Moreover, the percentage of the population living above the poverty line has only shown a slight increase.

In Figure 1-11, changes in income brackets are shown over time.

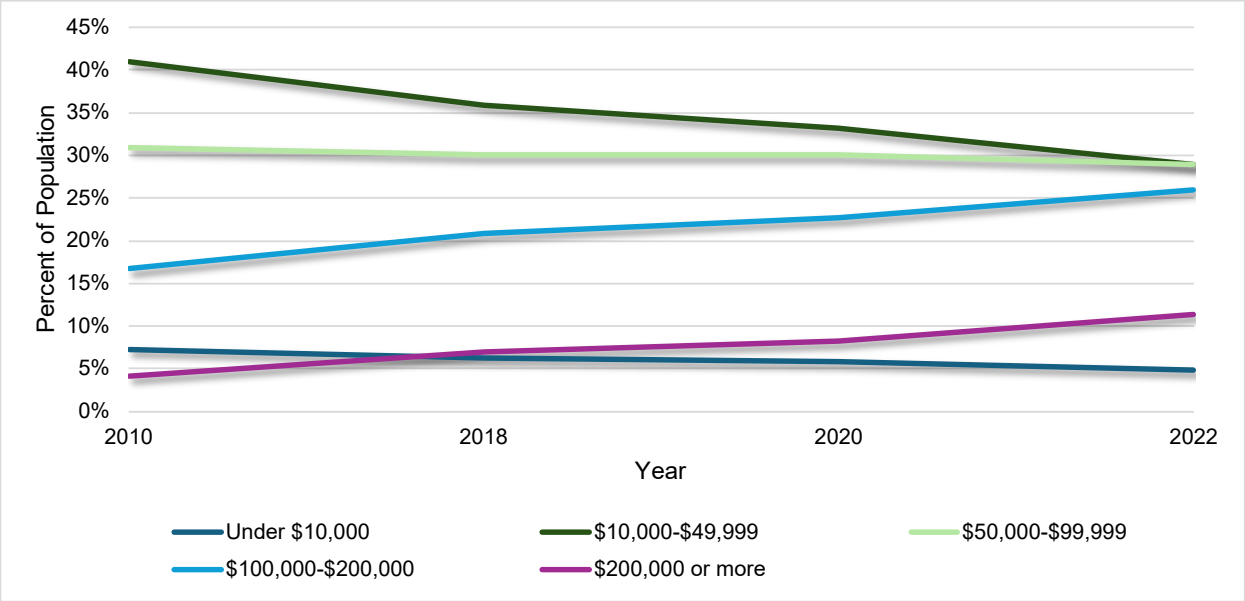


Figure 1-11: Household Income Over Time in Collier County

Source: 2010 ACS 5-year estimates, 2018 ACS 5-year estimates, 2020 ACS 5-year estimates, 2022 ACS 5-year estimates

The percentage of people earning under $10,000 annually decreased from 7.2% in 2010 to 4.9% in 2022, a change of about 2%. Conversely, the percentage of individuals earning $100,000 or more annually increased by about 10%. This indicates a faster rate of income growth among higher earners. As incomes rise, fewer people may rely solely on public transportation due to increased affordability of private vehicles or alternative options. The percentage of individuals earning between $50,000-$99,999 annually has remained stable, representing a group that might still prefer public transit for its convenience and cost-effectiveness, especially in urban areas with high traffic congestion and parking costs.

The age distribution among males and females has remained relatively consistent from 2000 to 2022, with a balanced ratio between genders and each gender representing about half of the population. The ethnic majority within this demographic remains Caucasian. Over time, it was observed that there was a slight decrease in the youth population and an increase in the senior population, which again highlights the growing need for accessible services. Notably, there is an increasing trend in the portion of the population aged sixty and over, which could potentially lead to a heightened demand for fixed-route transit and paratransit services. Figure 1-12 below further depicts the distribution of population across gender and age groups. It shows that Collier has an aging population, with the more senior age groups outweighing the youth age groups. This would be important to consider, as it could be one reason contributing to the increase in the transportation-disadvantaged population over the years.

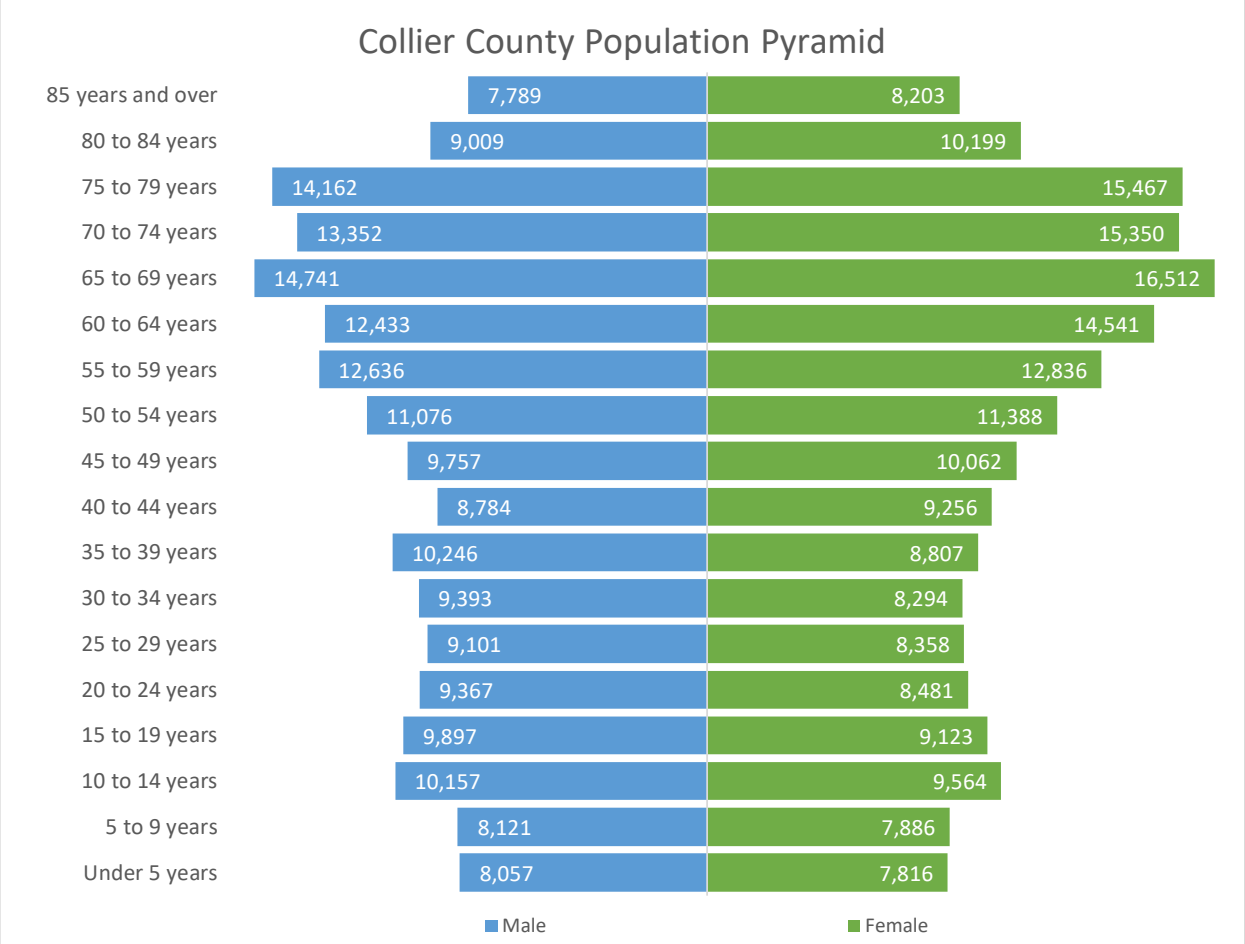


Figure 1-12: Population Age Distribution in Collier County

Consistently since 2010, over 95% of households in Collier County have at least one vehicle or more and the percentage of households without access to a private vehicle is very low at less than 5% of the total number of households. However, this demographic characteristic is important as it can potentially identify areas of the county that may be more reliant on public transit and may require more service. Figure 1-13 below shows the distribution of no-vehicle households throughout Collier County, at the census block groups geographic level. It appears that the current transit network services these areas well, although not quite reaching the areas further north-west of Pelican Bay and north-east of Immokalee and the conservation areas. Everglades seems to have a few households with no vehicle but there is a lack of transit service in that area as the existing network does not provide service to much the southern area of Collier County.

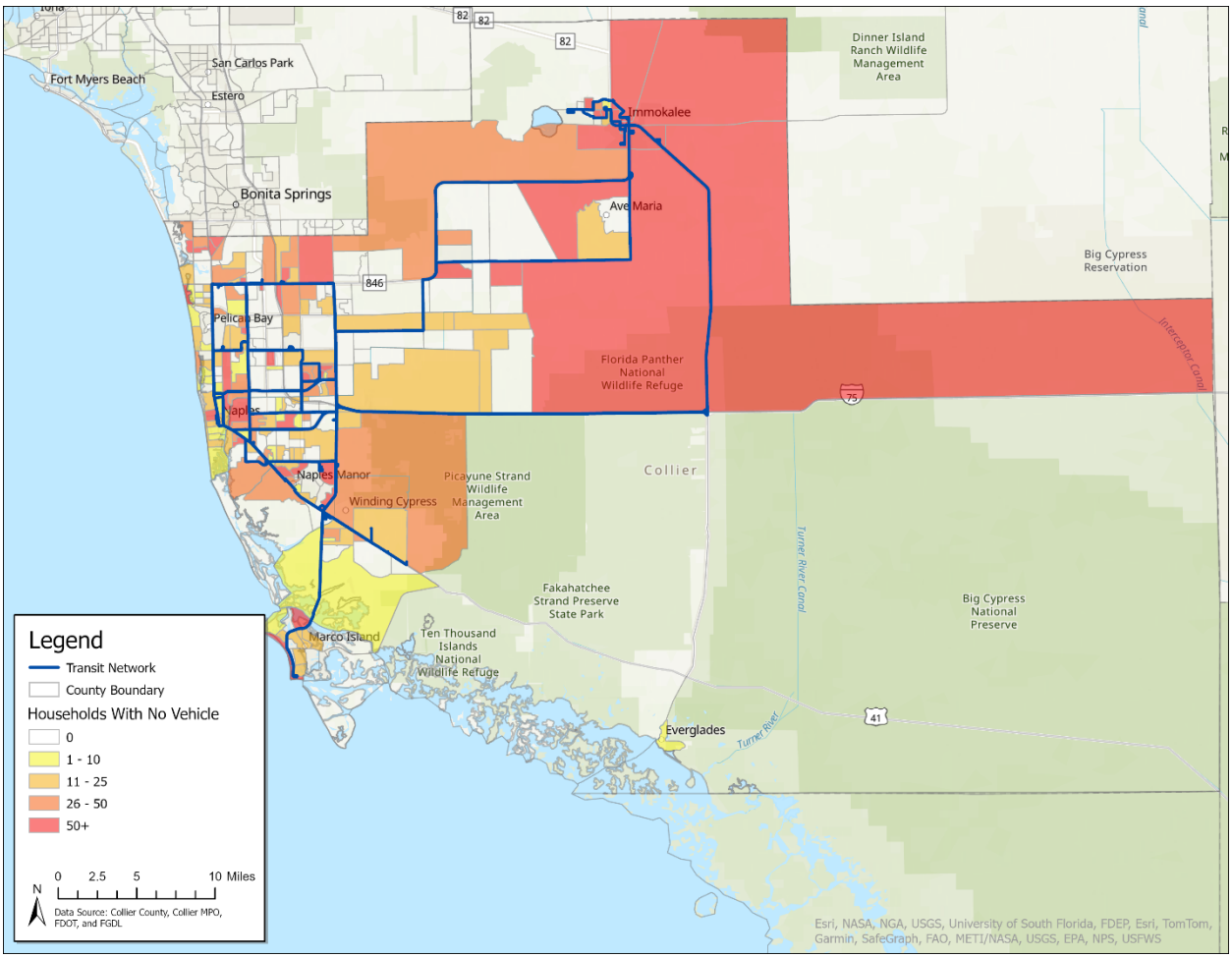


Figure 1-13: Distribution of Households with No Vehicle in Collier County in 2022.

1.4 Transportation Disadvantaged Population

CAT's paratransit service, CAT Connect, serves the Category I Transportation Disadvantaged (TD) population, including those with disabilities, the elderly, low-income individuals, and high-risk children as defined by CTD, providing door-to-door shared ride public transportation. After a passenger requests a drop-off time, they are given a two-hour pick-up window determined by a customer service representative.

Table 1-2 shows the trend in the size of the potential TD population and the number of TD passengers between 2021 and 2025 in Collier County based on the most recent Florida Commission for the Transportation Disadvantaged Annual Operations Report. Due to updates in the forecasted numbers in the 2023-2027 Collier County Transportation Disadvantaged Service Plan, the potential TD population figures for 2021 to 2025 are now based on the 2021 U.S. Census ACS 5-year Estimates, replacing the forecasted numbers from the 2018-2022 plan.

Table 1-2: Forecasted Collier County transportation disadvantaged population.

	2021	2022	2023	2024	2025	% Change (2021-2025)
Potential TD Population	14,309	14,489	14,671	14,856	15,043	5.1%
Total Daily Trips by the Critical Need TD Population	4,020	4,088	4,157	4,228	4,299	6.9%

Source: Collier County Transportation Disadvantaged Service Plan Major Update 2023-2027

The potential TD population has risen nearly 5.1% from 14,309 in 2021 to 15,043 in 2025, and the number of daily trips increased by 6.9% in this period. This gives a strong indication of the growing need for paratransit services in the upcoming years.

Table 1-3 shows the total number of TD trips served between 2019 to 2023.

Table 1-3: Collier County transportation disadvantaged trips served

	2019	2020	2021	2022	2023	% Change (2019-2023)
TD Trips Served	117,585	104,137	113,598	109,044	133,799	13.8%

Source: Florida Commission for the Transportation Disadvantaged 2020 Annual Operating Report, Florida Commission for the Transportation Disadvantaged 2022-2023 Annual Operating Report

The number of TD trips served through CAT's brokered system, as the Community Transportation Coordinator (CTC) for Collier County, increased 13.8% from 117,585 in 2019 to 133,799 in 2023. This demonstrates the increasing desire and need for more paratransit trips in the region.

Figure 1-14 shows the number of TD passengers served during the five-year period from 2019 to 2023.

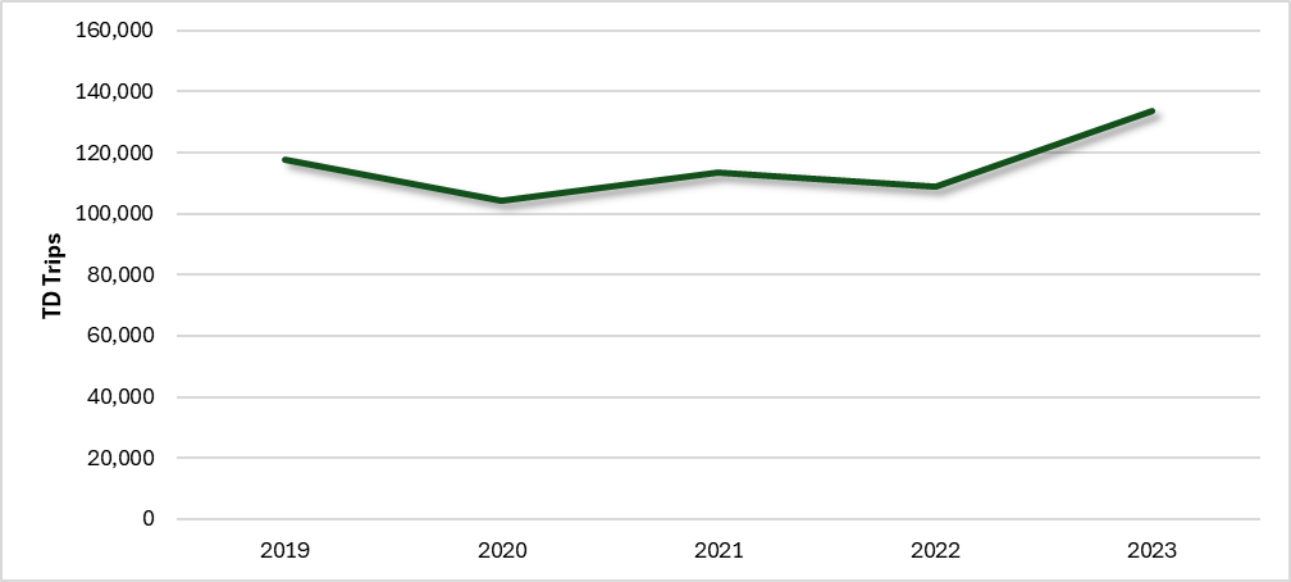


Figure 1-14: Collier County transportation disadvantaged trips, 2019–2023 (Source: Florida Commission for the Transportation Disadvantaged Annual Operations Reports (AOR))

During this time, the total number of TD passengers showed an upward trend, with occasional dips in ridership observed in 2020 and 2022. These declines were likely due to the impacts of the COVID-19 pandemic resulting in decreased trips. Notably, the most significant increase in TD trips served (22%) occurred between 2022 and 2023. As the TD trips continue to grow, it will be important to ensure that enough services are provided to support this part of the community as well as ensuring fixed-route service options, which are more cost-effective, are accessible for all types of users.

As shown in Figure 1-15 below, TD trips have just increased in line with population growth.

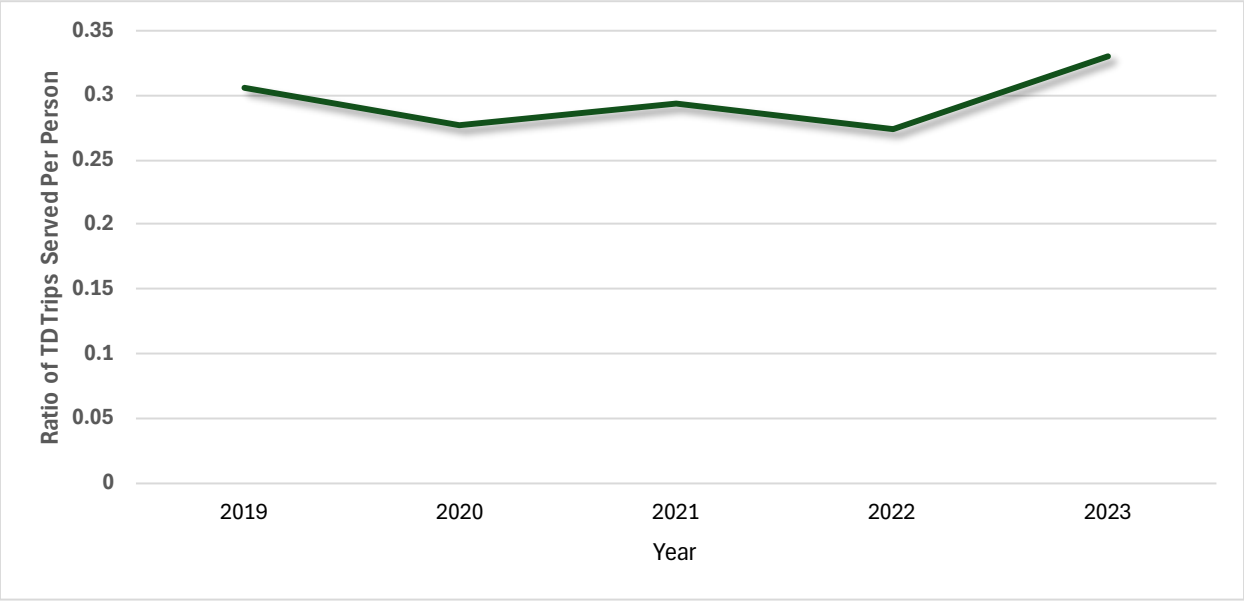


Figure 1-15: Ratio of TD Trips to Total Population

1.4.1 RECENT IMPROVEMENTS TO PARATRANSIT SERVICES

Several improvements have been implemented to the paratransit services in Collier County as outlined by the CAT Connect Paratransit Service Report. First, accessible bus stops have been added to improve ADA accessibility. Ecolane, a paratransit software, has been implemented, and Travel Trainings provided by CAT have been conducted. Additionally, improvements to the phone systems have resulted in a decrease in average queuing time and a reduction in abandoned calls.

1.5 Labor and Employment Characteristics

The employment sector distribution in Collier County not only reflects the economic vitality and job market trends but also serves as a critical indicator of transit dependency and the necessity for inclusive transportation planning. Figure 1-16 and Figure 1-17 show the estimated employment distribution in 2024 and 2035 respectively. As commercial areas and places of employment grow and develop, urban communities such as Pelican Bay, Naples and Naples Manor, Ave Maria, Immokalee, and Marco Island will experience an increase in employment numbers. This is depicted in the employment density maps, as the TAZs around these urban communities have higher employment numbers compared to the rest of the County, represented by yellow, orange, and red. These TAZs are mostly located along the existing transit network, which means that the current network is doing well in providing service in the more employment-dense areas.

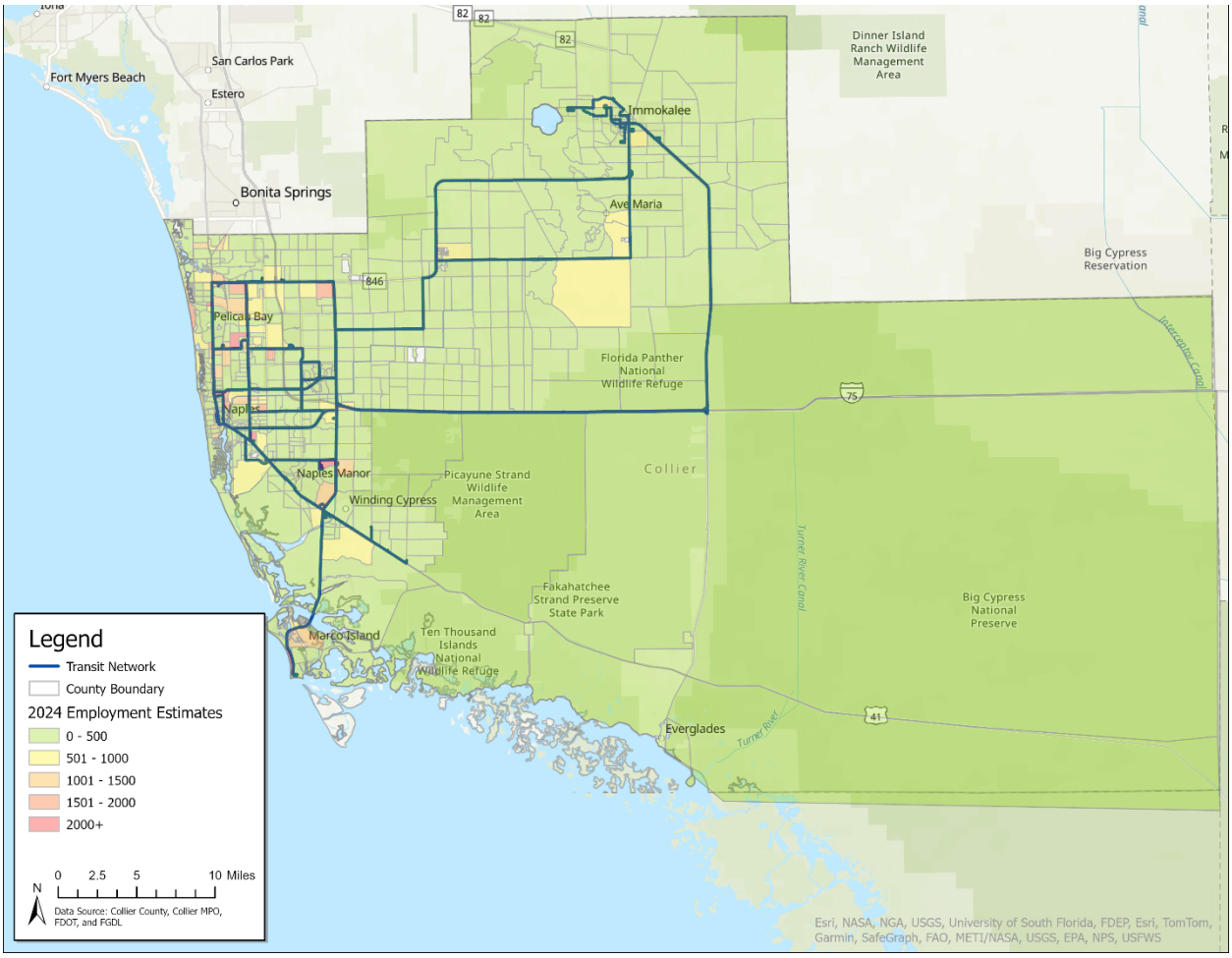


Figure 1-16: Collier County Employment Distribution 2024

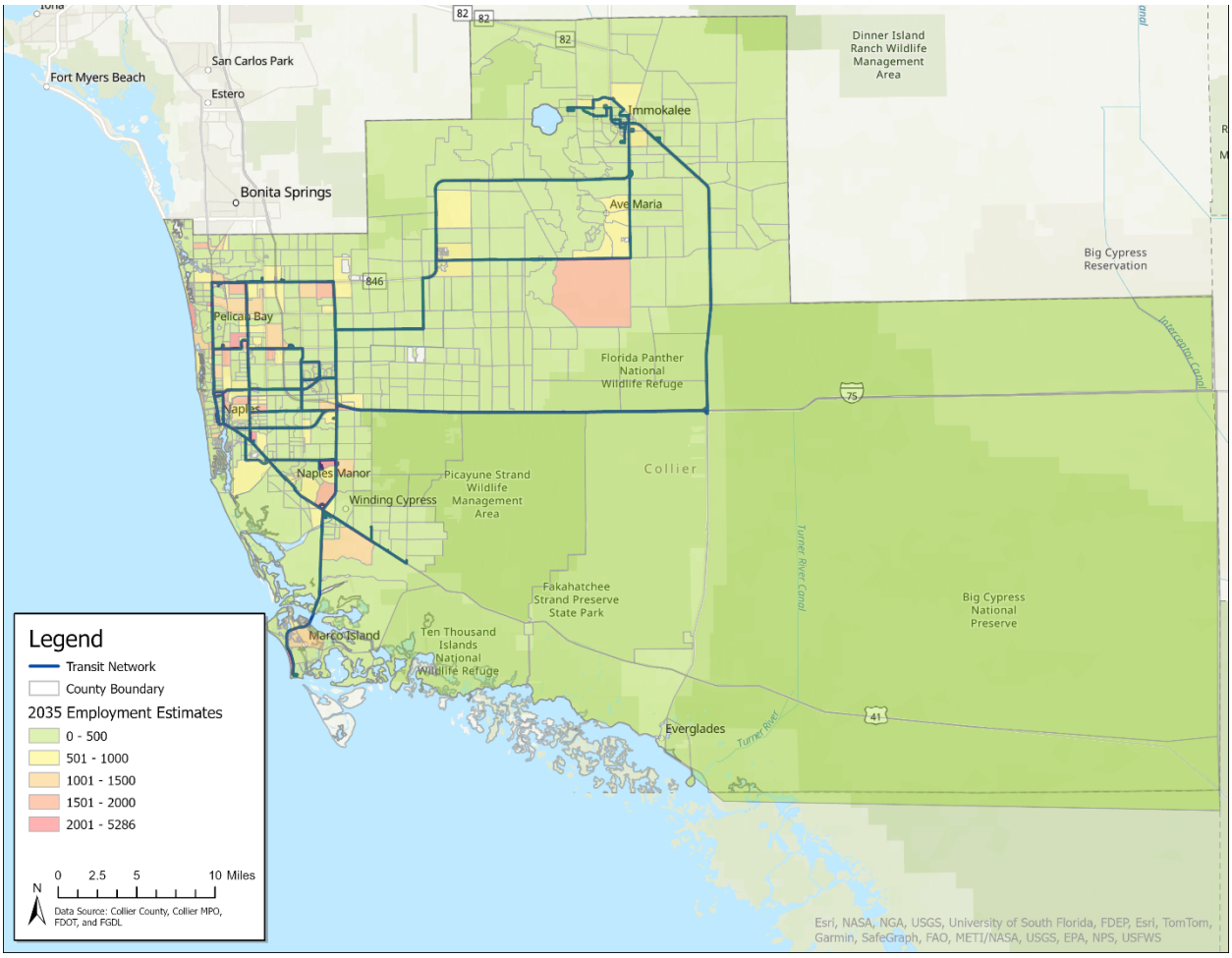


Figure 1-17: Collier County Employment Distribution 2035

Figure 1-18 shows the employment growth increase between the 2024 and 2035 population estimates. This growth change map depicts high growth rates for the TAZs within and around the urban communities of Naples Manor, Marco Island, Immokalee, Ave Maria, and Orangetree (west of Ave Maria). Although the rate of employment growth is more dispersed across the county as compared to population growth and dwelling unit increase, the high growth areas are still centered around the urban communities and along the existing transit network. Areas of high growth indicate potential for more transit demand as employment opportunity increases, generating more trips to get to these destination points. A unique high growth area is the Big Cypress National Preserve, which may impact transit service considerations as there is currently little service around that area of the county. The agricultural areas next to these communities appear to have little to no growth or even decreasing population, specifically outside of Immokalee and in the parks or nature reserves.

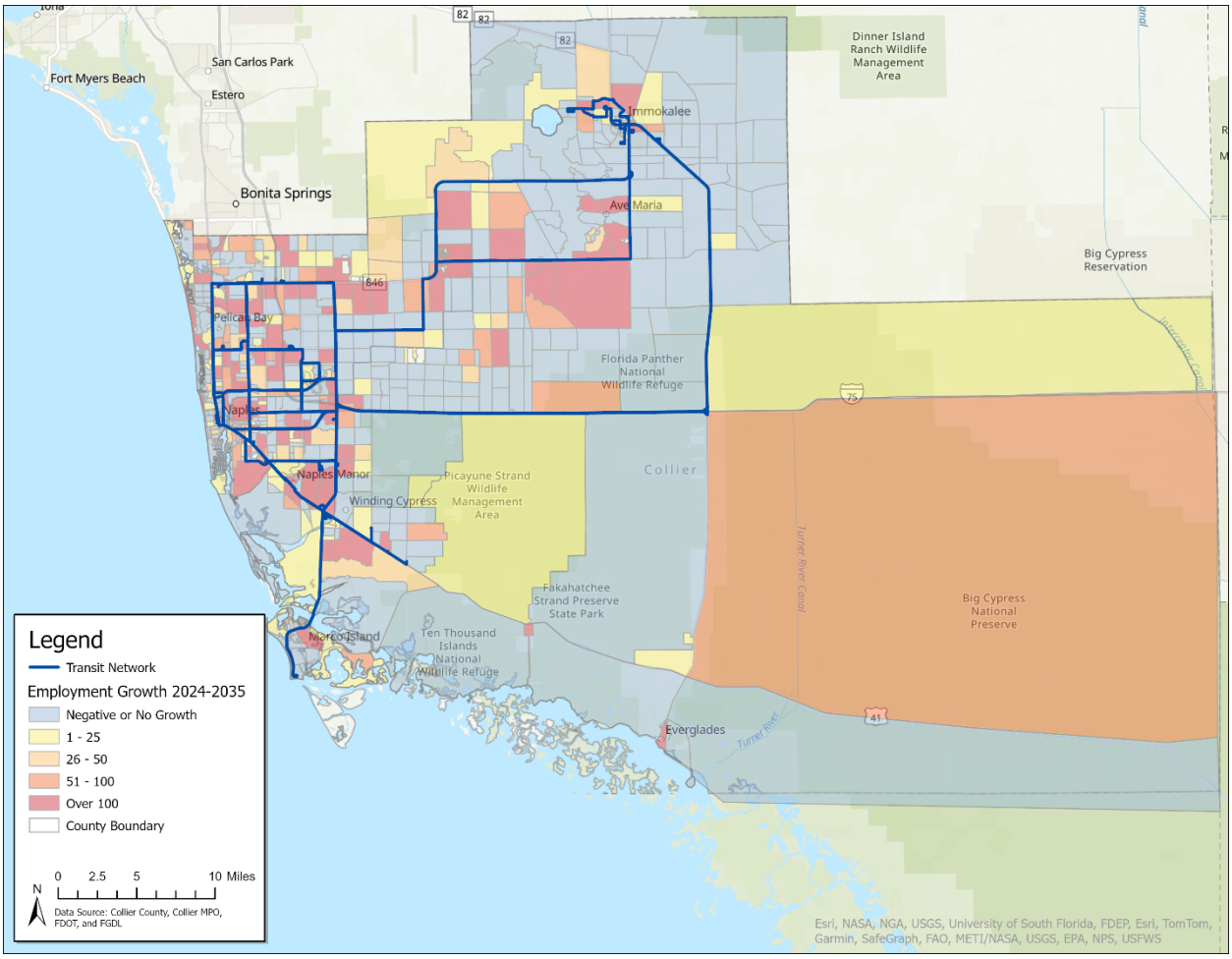


Figure 1-18: Employment Growth Between Estimated Employment Densities from 2024 to 2035

Figure 1-19 illustrates the distribution of employment across various sectors in Collier County in 2010, 2020 and 2022, offering insights into which sectors most influence the mobility requirements of the residents in before, during and after the COVID-19 pandemic.

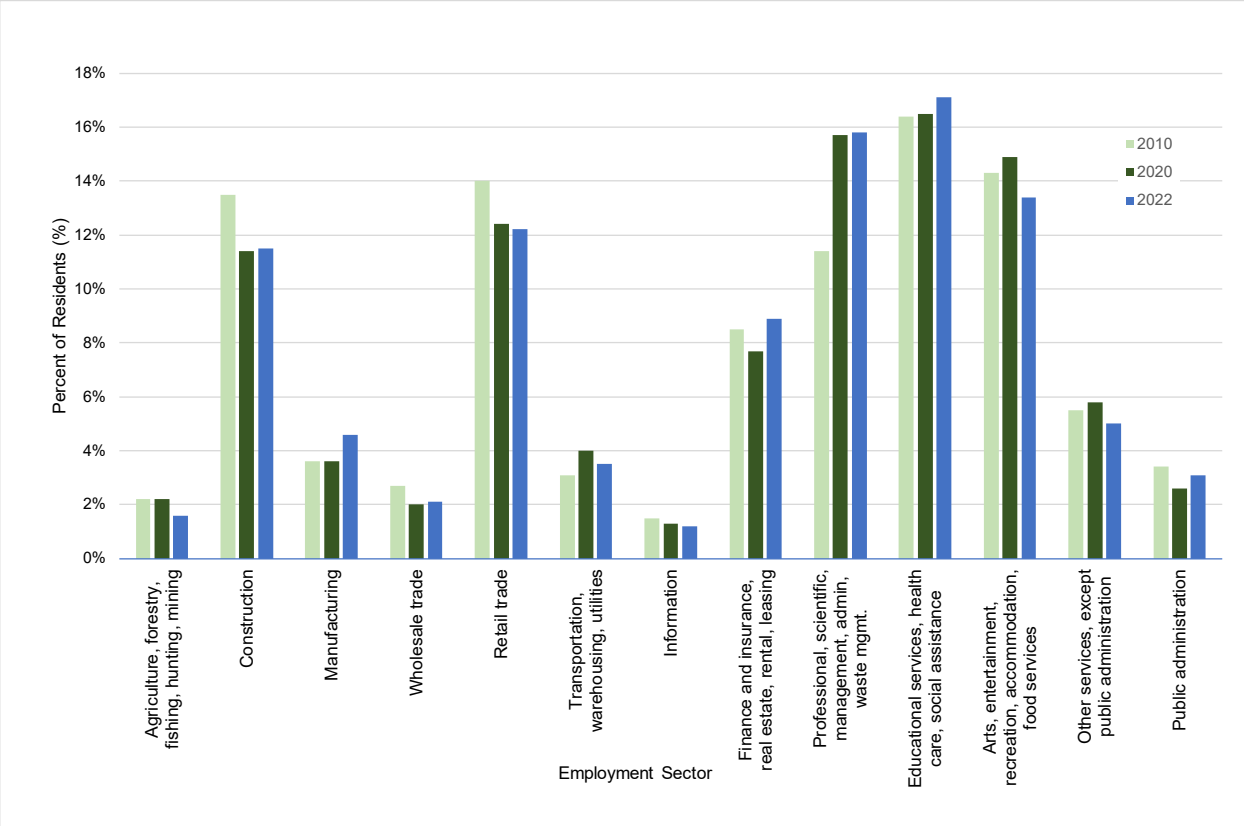


Figure 1-19: Collier County Labor Force Distribution by Service Area, 2010, 2020, and 2022

Source: 2010 ACS 5-year estimates, 2020 ACS 5-year estimates 2022 ACS 5-year estimates

As seen from Figure 1-19, the largest employment sectors in Collier County from 2010 to 2022 were the educational services, health care and social assistance sectors at around 16-17% of the workforce. Following closely are professional, scientific, management, administrative, waste management services and the arts, entertainment, recreation, accommodation, and food services sectors, each accounting for approximately 11-15% of the workforce. From Figure 1-11, a greater percent of the population earns more than $50,000. Thus, over time, more residents in Collier County can afford personal transportation, which may reduce their reliance on public transit. This observation also presents itself *Figure 1-13*; most of Collier's households own two or more cars. In contrast, sectors such as agriculture, forestry, fishing, hunting, mining, and transportation and warehousing, and utilities have experienced a downtick in their share of the workforce from 2010 to 2022. These types of jobs tend to have less employees working from home, leading to a lower reliance on personal vehicles or transit options in the County. Overall, the figure highlights the need for targeted transit solutions that cater to the unique needs of each employment sector, ensuring equitable access to mobility for all residents, regardless of income level.

Lee County is the primary residence for Collier County residents working outside their home county. According to recent data from the Greater Naples Chamber, 7,881 net commuters and 32,257 total inbound

commuters traveled from Lee County to Collier County in 2023. This highlights the interconnectedness of the two counties' labor markets.

Figure 1-20 shows the unemployment rates in years ranging from 2010-2022 based on ACS 5-year estimates.

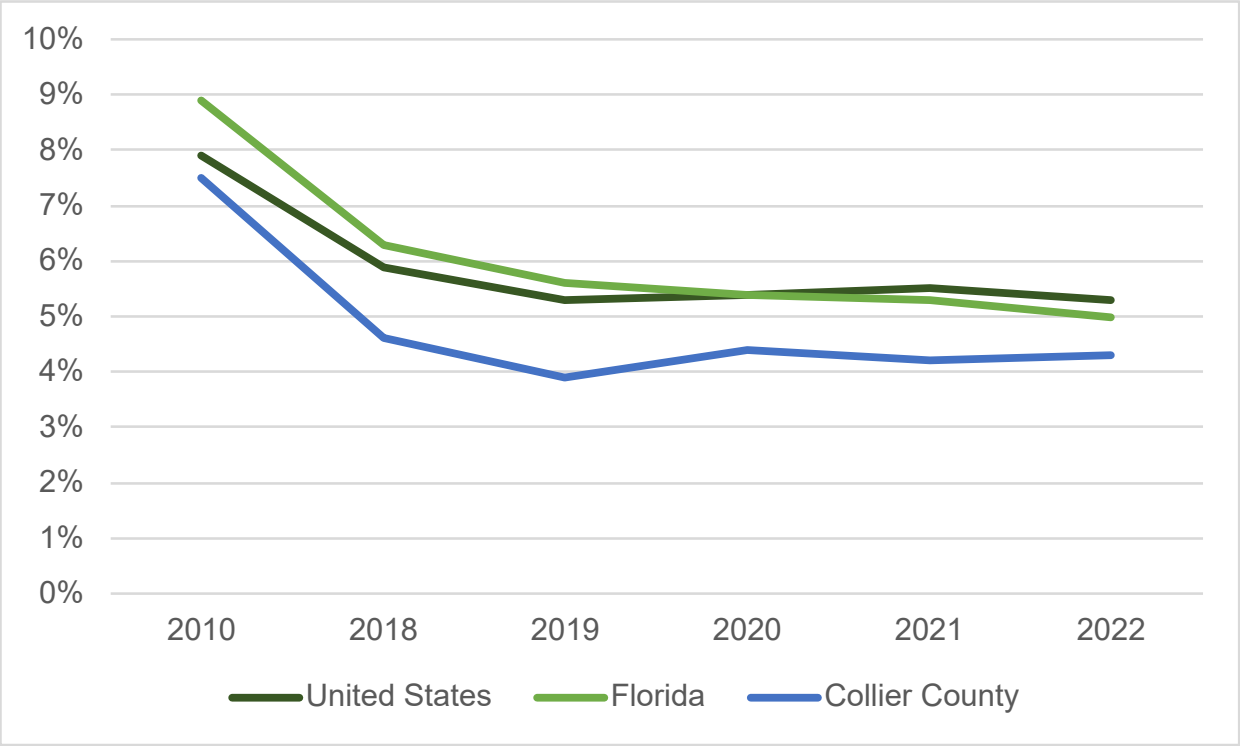


Figure 1-20: National, State and County Unemployment

In 2010, Collier County experienced higher unemployment rates. However, since then, there has been a consistent decline year by year. Collier County's unemployment rates consistently outperformed both national and state-wide averages. Even during the pandemic, when many regions faced economic challenges, Collier County maintained lower unemployment rates. Lower unemployment rates often correlate with economic recovery. When the economy improves, people are more likely to engage in various activities, including using public transportation.

1.6 Educational Attainment

A review of income levels and poverty incidence in Collier County follow educational attainment. Studying the level of educational attainment often identify areas with persons who may relay on public assistance, frequent social service agencies, and reside within areas of affordable workforce housing. Studying trends in this area has helped CAT consider services as well as future demand.

Levels of educational attainment in the county can correlate with earnings potential and job security. This influences mobility need. Figure 1-21 shows the educational attainment of residents ages 25 years and older in Collier County.

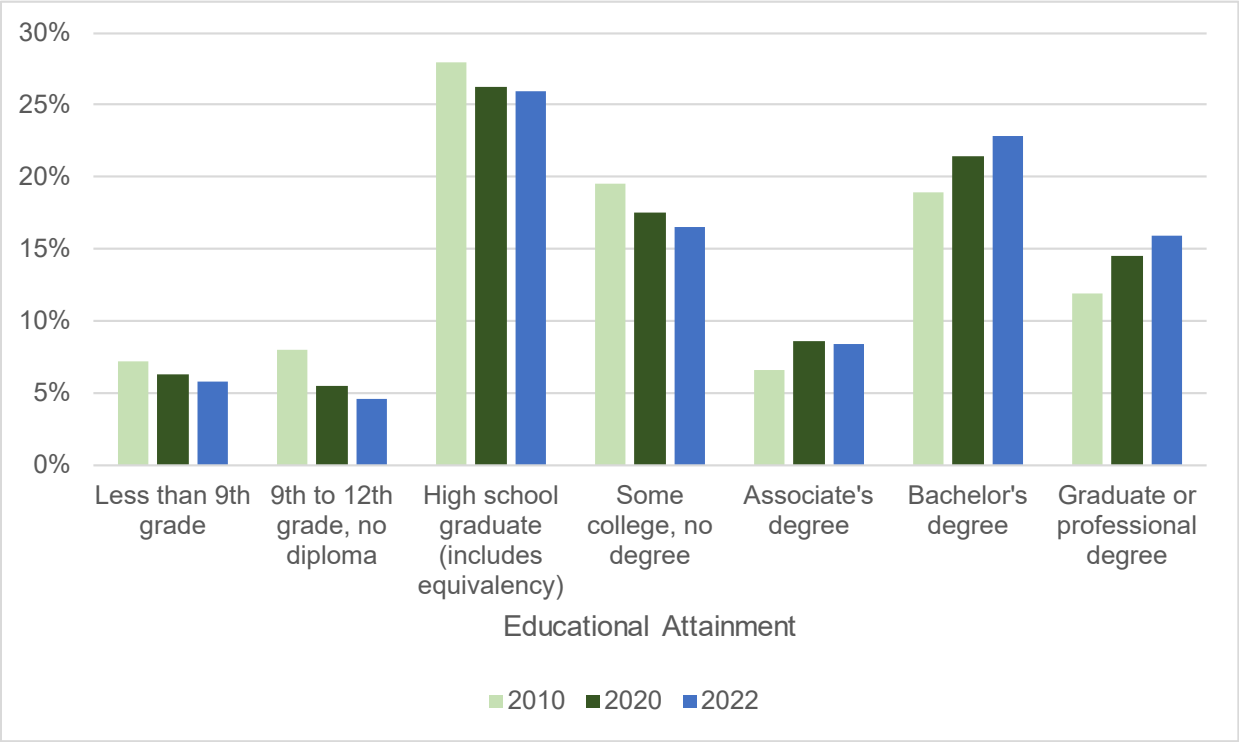


Figure 1-21: Educational Attainment in Collier County

As seen from the Figure 1-21 above, more residents have obtained a bachelor's degree over time from 2010-2022. Despite this, while those obtaining bachelor's and graduate degrees are increasing in the County, approximately 30% of the population does not have a college degree which indicates around a third of the population with potentially lower potential earnings and an increased likelihood of requiring transit service.

1.7 Tourism

Tourism plays a vital role in shaping transportation needs and services within Collier County. Tourists arrive in Collier County year-round, but the peak season spans from March to August. There are two distinct groups of visitors: seasonal residents who live in Naples for more than 4 months (typically October - April) and those visiting the area as tourists. The Tourist Development Council (TDC) makes a distinction between these groups, as seasonal residents tend to own properties while vacationing visitors do not.

Tourists often rely on public transit, especially those accustomed to using it in their communities. Seasonal visitors and residents contribute to increased transportation demand. According to the Collier County Tourist Development Council, in 2023, through October, Collier County welcomed 2.3 million visitors, generating an economic impact of $3.01 billion. This substantial economic impact underscores the importance of efficient transportation services.

Collier County boasts pristine beaches, attracting sun-seekers and water enthusiasts. Tourists may use various services such as the Breeze Beach Shuttles, bike routes, and bicycle rentals as first mile/last mile access to transit hubs. However, it's worth noting that tourism numbers have shown some fluctuations. For instance, in March 2023, Collier County experienced a 20% year-over-year decline in visitors compared to March 2022. These fluctuations in visitor numbers can impact transportation needs and usage patterns throughout the year.

Figure 1-22 and Figure 1-23 show key tourist destinations by mapping major points of interests in Collier County in relation to transit line locations in the region. Attractive destinations include airports, beaches, museums, boating areas, and parks. While a grand majority of points of interest lie around the Naples region, there could be more extensive access to the beaches in Marco Island.

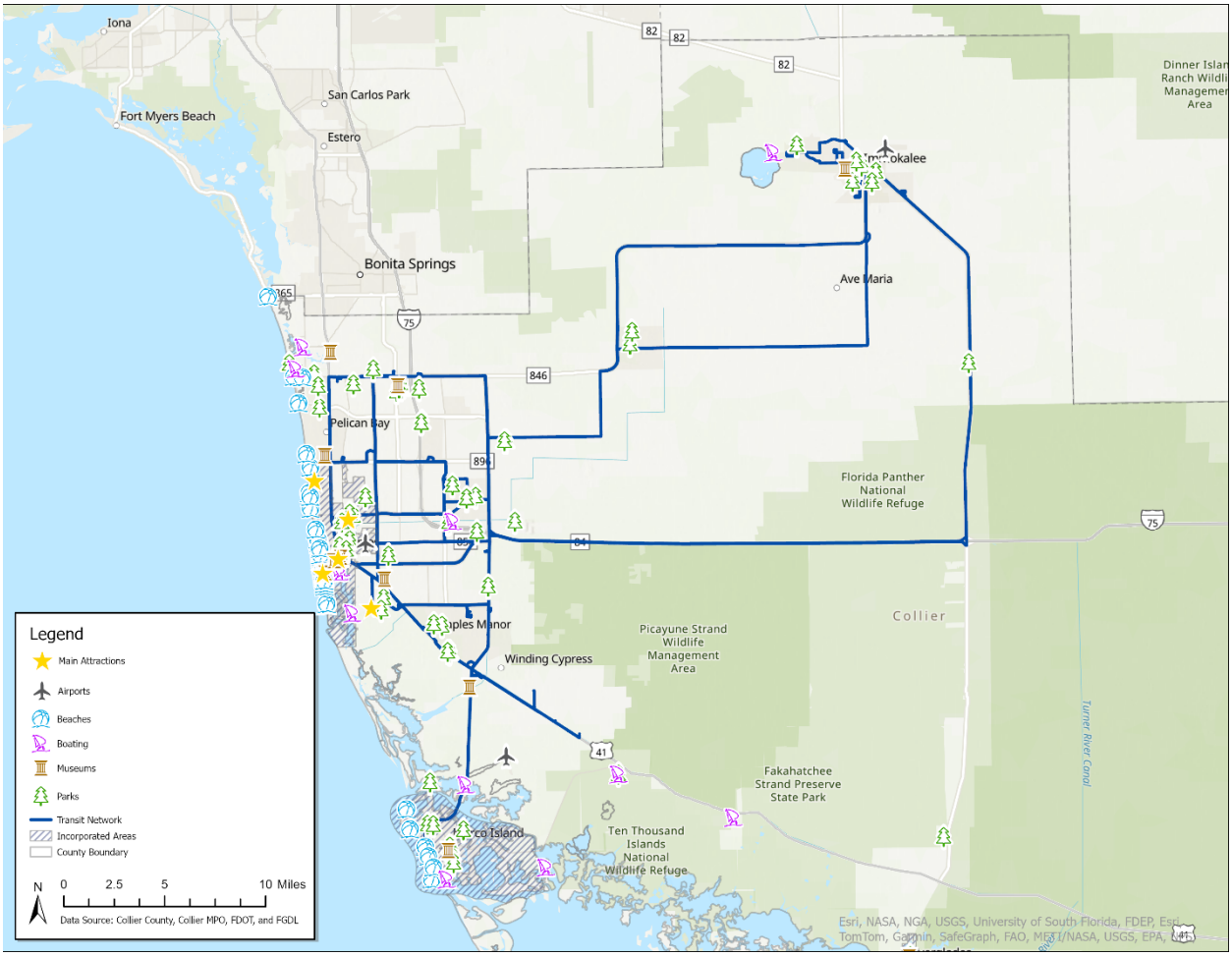


Figure 1-22: Transit Access to Point of Interest Destinations in Collier County

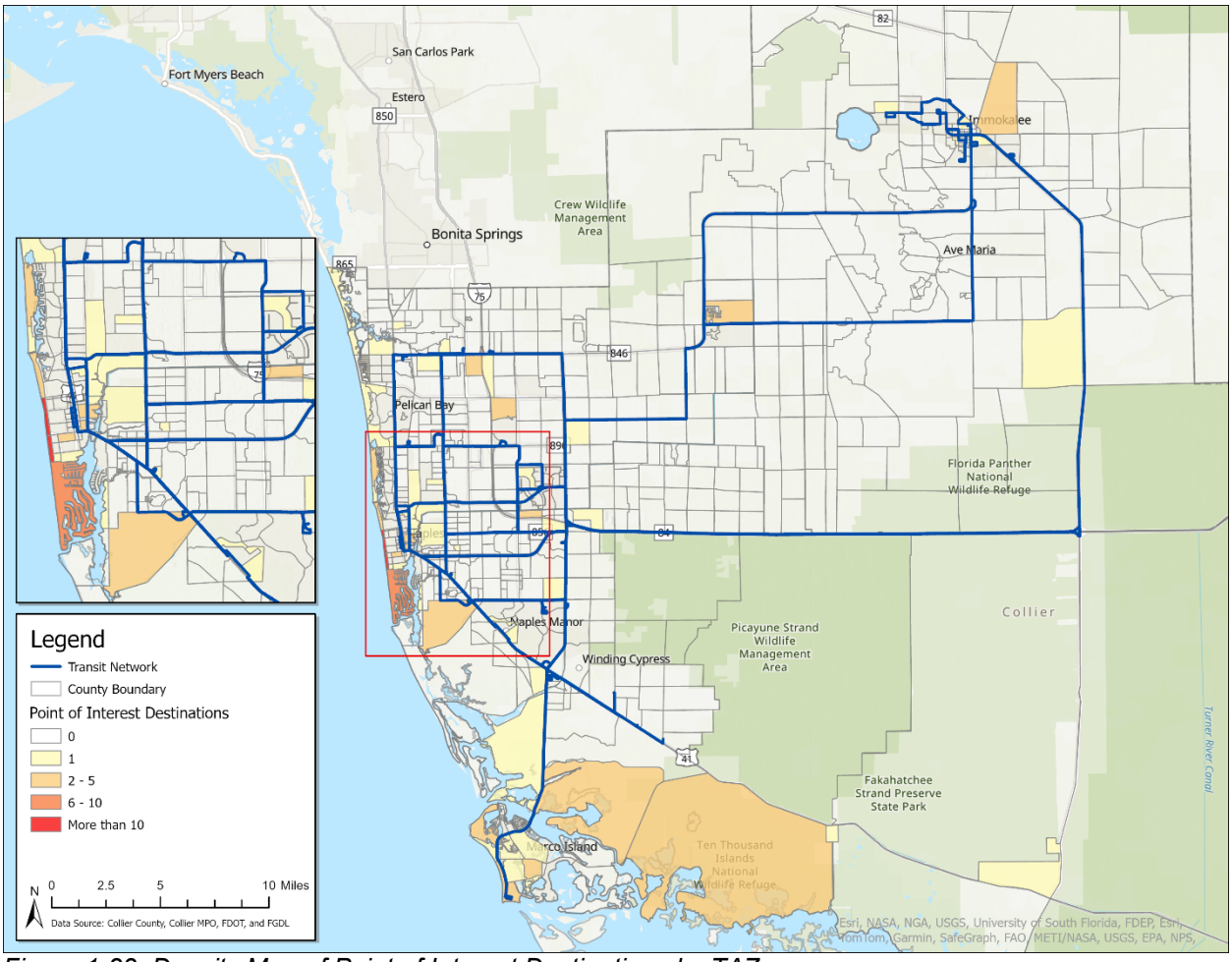


Figure 1-23: Density Map of Point of Interest Destinations by TAZ

More recently, a study in June 2024 by Florida Gulf Coast University on Regional Economic Indicators (Southwest Florida Economic Outlook, Regional Economic Research Institute, FGCU, 2024) found that seasonally adjusted real tourist tax revenues for coastal counties were up 14% in March 2024 compared to March 2023. In addition, airport passenger activity also increased 12% from April 2023 to April 2024. This would suggest that tourists are increasingly coming to the coastal areas of Florida such as Collier and spending more money when they do so, demonstrating their affluence and therefore likely limited propensity to take transit.

1.8 Major Trip Generators

Understanding the major trip generators within the county can help determine where to provide the most transit service. Table 1-4 displays the top employers in Collier County by the number of employees. The largest employers operate in the educational, government, and healthcare industries. Arthrex, NCH Healthcare System, Publix Supermarket, and Gargiulo are the 4 largest private sector employers in the county. On the other hand, all Gargiulo locations lack public transit access, as most of them are situated in rural or industrial areas, however, the location beside Old 41 Road has access from Route 600. Due to all Publix locations being near commercial centers, most, if not all, locations are accessible by transit. Similarly, most, if not all, public-school and local government buildings in the county are surrounded by residential or

commercial hubs areas that have access to public transit stops. As development expands to accommodate more housing and commercial demand (see Section 3.8), it will be necessary for CAT to consider expanding their public transit services.

Table 1-4: Top Employers in Collier County in 2023

Employer	Number of Employees
Collier County Public Schools	5810
Collier County Local Government	5045
Arthrex	3983
NCH Healthcare System	3288
Publix Super Market	2935
Gargiulo	2082
Pacific Tomato Growers	872
Walmart	807
Marriott International, Inc.	669
Moorings Park	657
Downing-frye Realty Inc.	605
McDonald's	545
Vi at Bentley Village	494
Asg	447
David Lawrence Center	423
Philharmonic Center For The Arts	412
Naples Lake Country Club	402
Walgreens	389
Ave Maria School of Law	372
Heartland Health Care Center Ft Myers	372
Aa Stucco & Drywall Inc.	350
Home Depot	350
Seminole Casino Hotel Immokalee	350
CVS Pharmacy	349
Twineagles Pro Shop	333

(Source: Regional Economic Research Institute at Florida Gulf Coast University (2023)).

Figure 1-24 and Figure 1-25 show the distribution of top employer locations in Collier County and their distribution relative to existing transit lines. While most places of employment are accessible to transit, there exists many points of interest north of Pelican Bay and North or Immokalee which are further from a transit line. An extension of transit lines along Route 29 and 41 towards Everglades City would be important as well and increase commercial zones in that area.

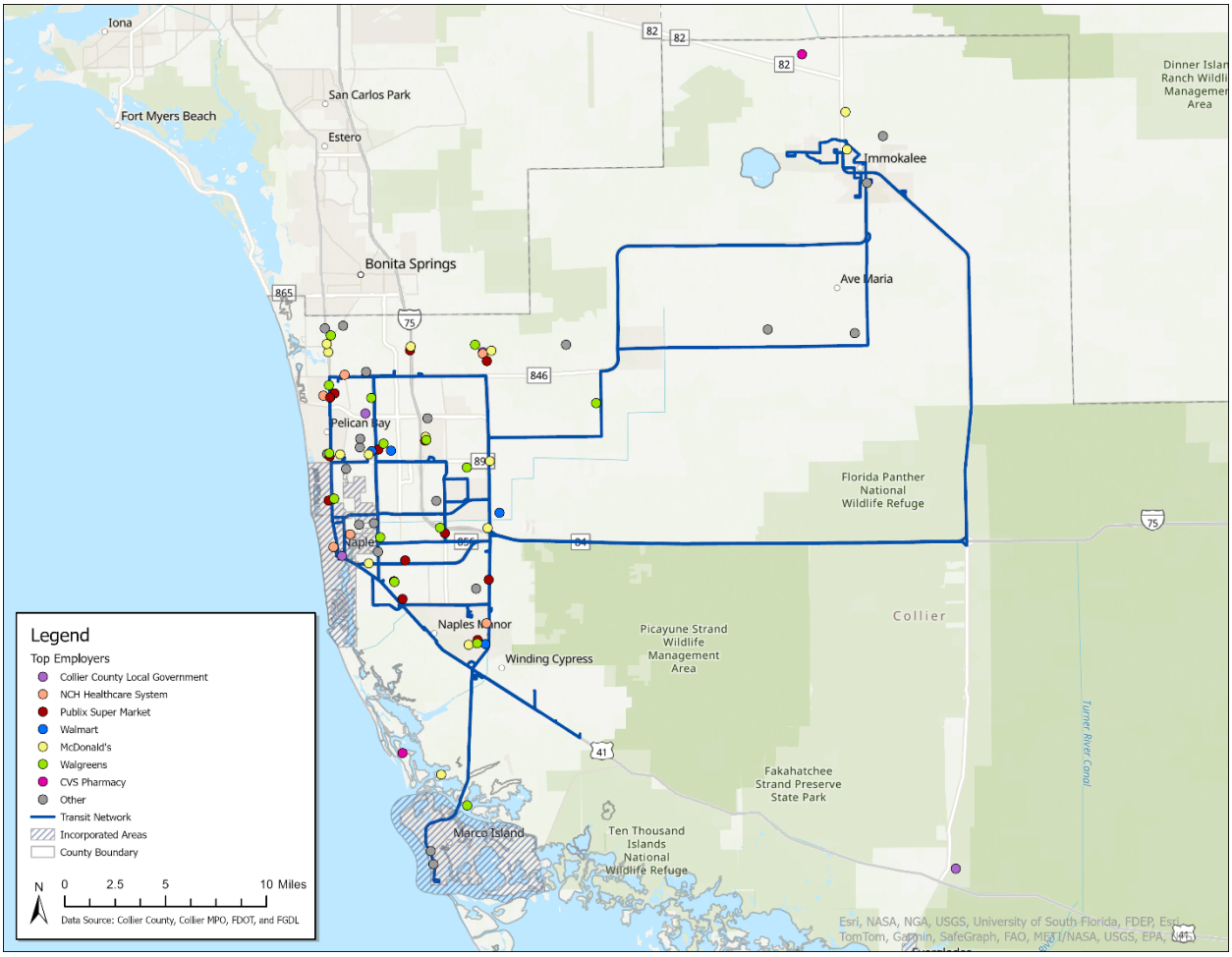


Figure 1-24: Transit Access to Top Employers in Collier County in 2023

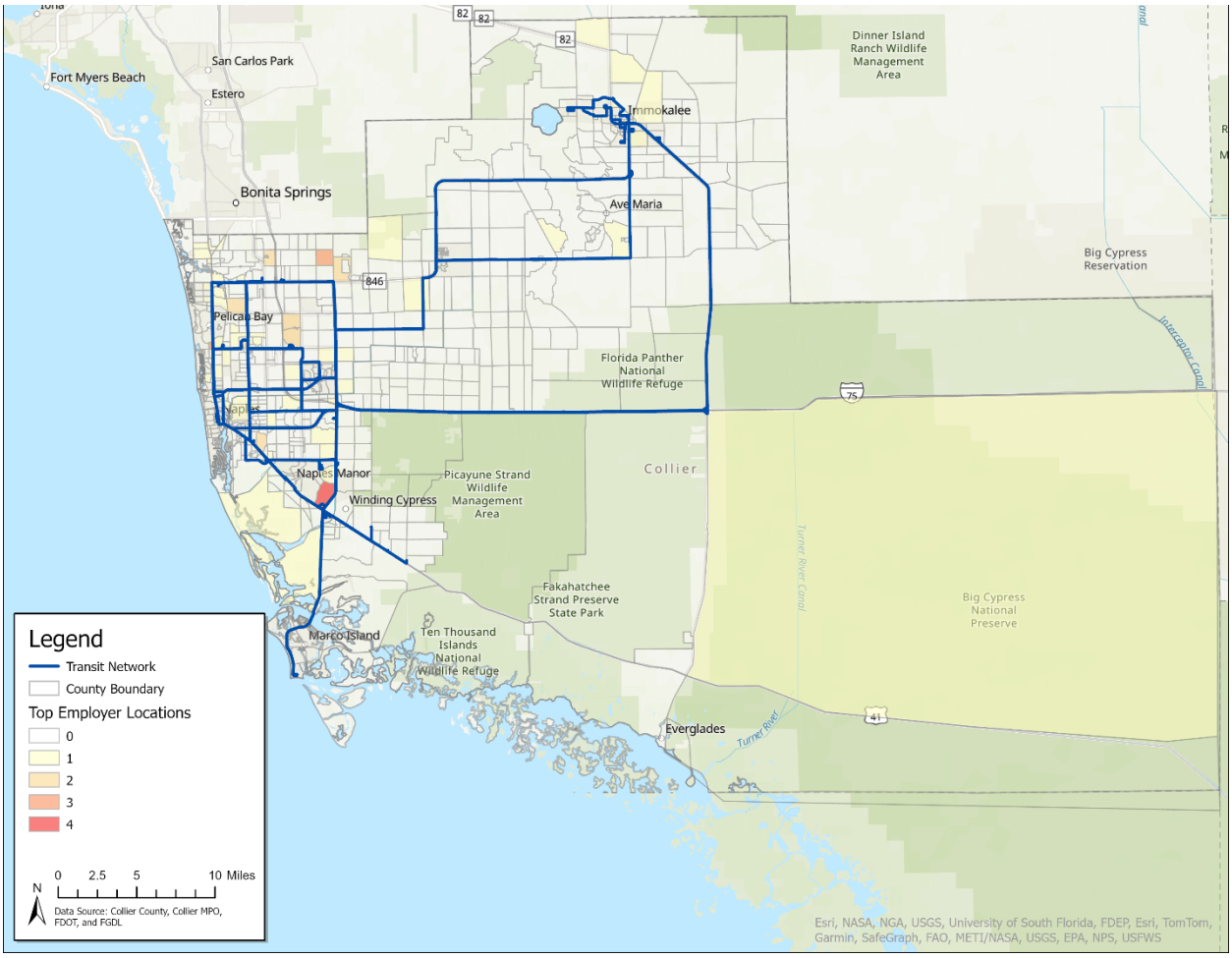


Figure 1-25: Density Map of Top Employer Locations by TAZ

1.9 Major Developments

Table 1-5 shows the top 10 planned unit developments (PUDs) by acreage. Transit lines running adjacent to each proposed development are also outlined. Figure 1-26 shows the Developments of Regional Impact (DRIs) in Collier County as of May 3, 2024. These developments are noted for potential impacts to existing and future travel demand and *Table 1-5* shows which routes currently serve these developments in the existing CAT transit network as of May 3, 2024.

Most of the proposed developments have transit services running adjacent to them. However, it's crucial to note that a significant portion of these developments are gated communities, which presents unique challenges for public transit access. Gated communities, which are prevalent in Collier County, often have restricted entry points and private roads that can limit direct access for public transit vehicles. Since most of these developments seek to expand residential areas, it will be important to ensure either an expansion of existing transit routes or the addition of new transit lines to serve these areas effectively. This may require innovative solutions to overcome the access limitations posed by gated communities.

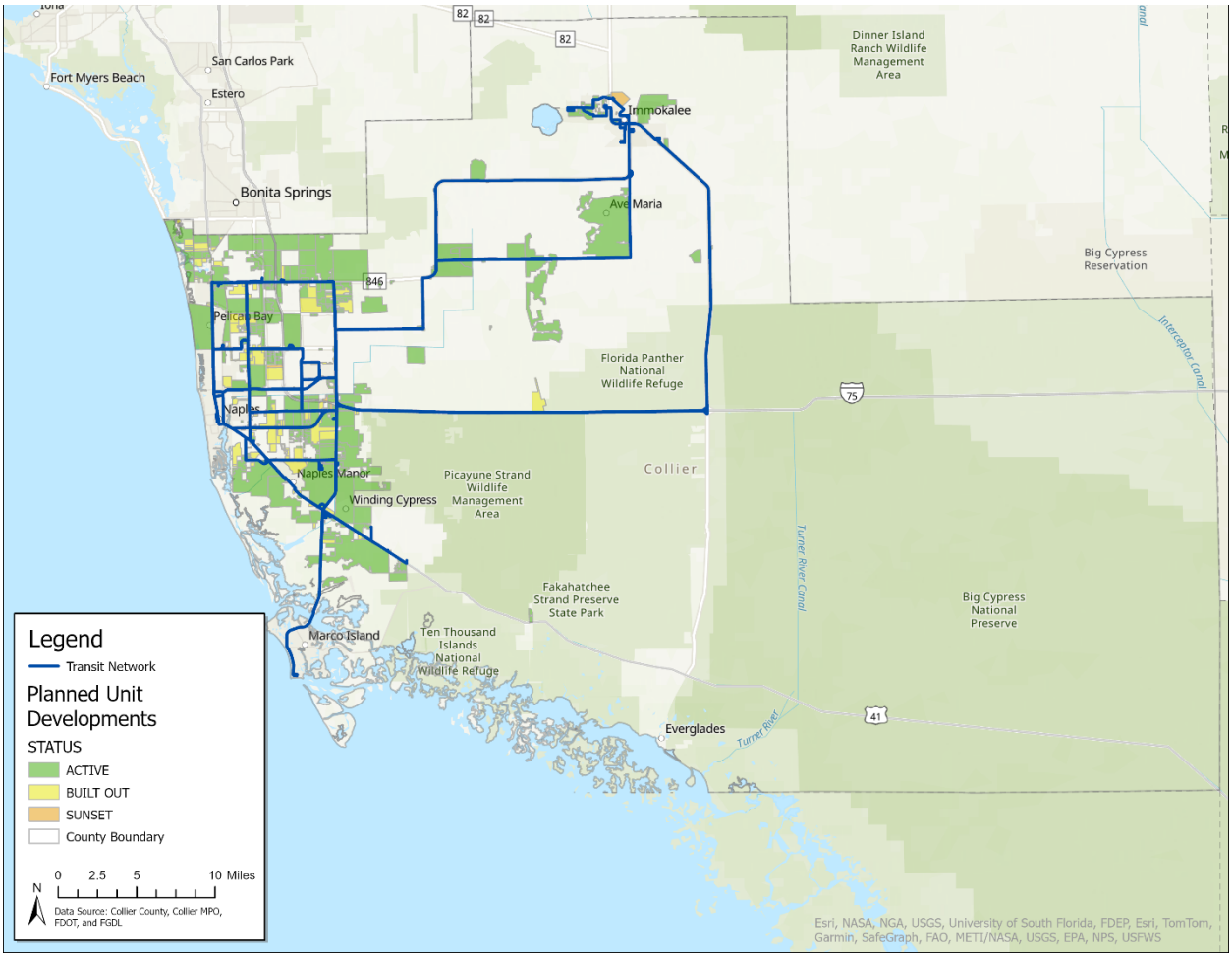


Figure 1-26: Status of Planned Unit Developments in Collier County

Table 1-5: Top Ten Planned Unit Developments in Collier County by Area

Planned Unit Development	Acres	Transit
Town of Ave Maria SRA	5928	Routes 19/22/23
Marco Shores/Fiddler's Creek	4215	Routes 21/24/121
Lely Resort	2880	Routes 17/21/24/121
Heritage Bay	2562	Route 27
Sabal Bay	2518	Routes 13/14/24
Hacienda Lakes	2264	Routes 17/21/121
Pelican Marsh	2191	Routes 11/12/27
Orange Tree	2131	Routes 19/22
Pelican Bay	2114	Routes 11/25/29
Winding Cypress	1960	Routes 12/17/21/24/121

Source: Collier County GIS Hub

1.10 Existing and Future Land Use

With a large land area, much of Collier County consists of agricultural land or park space. A significant portion of Collier County's land area is currently zoned for agriculture or open space (more than 90% all together; 38% and 54% respectively). About 5% of the land area is zoned for planned unit development (PUD), allowing for a significant amount of new or upcoming developments that would impact transit use and demand. The Naples and Marco Island are both zoned as incorporated areas. The land use varies more in Immokalee and the urban communities surrounding Naples, including Palm River, Naples Manor, Golden Gate, and so on. Excluding agriculture, open space, PUD, and incorporated area zoning, these areas consist of 76% residential, 12% commercial, 9% industrial, and 3% civic and institutional zoned land.

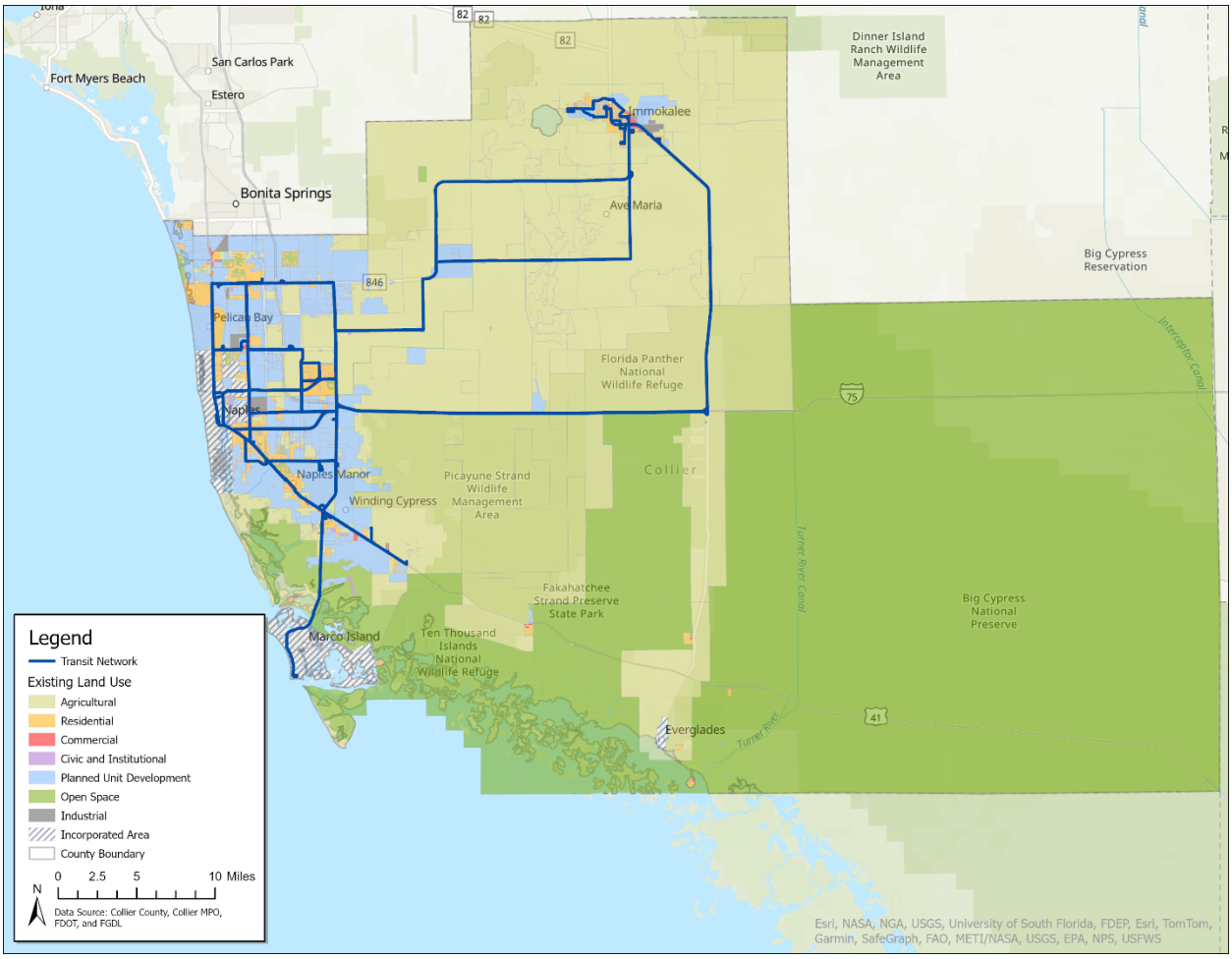


Figure 1-27: Existing Land Use Zoning Areas in Collier County

As the County grows and develops, land use areas are redesignated consequently to accommodate for development needs and purposes. In the County's future land use designations, open space or conservation designation areas are expanding, specifically in the Big Cypress National Preserve as it now includes the Florida Panther National Wildlife Refuge where it was previously zoned as agricultural land. A notable amount of agricultural land has been rezoned as rural or estates designation, which is defined as low density residential development with limited agricultural activities. The PUD areas are zoned as urban

residential land. The future land use designation also adds a new category of mixed-use activity in replacement of commercial and civic and institutional zoning.

A more detailed breakdown of future land use designations shows that conservation continues to occupy the largest portion (59%) of the County's acreage. It is still followed by agricultural/rural uses at 18%, but at a significantly smaller percentage compared to existing agricultural area. Estate designation and residential uses each constitute another 7% of the land. Noteworthy is the presence of sending and receiving areas, comprising of 3% and 2% of the land respectively, which serve as mechanisms to steer development away from environmentally sensitive regions towards designated growth areas.

Although the predominant land use remains focused on conservation and agriculture, mixed-use zoning holds immense potential for fostering transit-oriented development. Transit planning should prioritize serving receiving areas, ensuring that transit infrastructure supports the anticipated influx of development in these zones. Meanwhile, transit routes passing through sending areas should aim to minimize ecological impact and focus on connecting these areas to transit hubs and receiving districts.

Residential and estates areas present opportunities for creating walkable, mixed-income neighborhoods that are well-connected to transit services. Transit-oriented design principles should be integrated into the planning and development of these areas, emphasizing pedestrian-friendly streetscapes, mixed-use zoning, and access to public transportation. Additionally, transit routes serving these neighborhoods should offer frequent and reliable service, catering to the diverse needs of residents across different income levels and demographics.

Figure 1-28 and Table 1-6 depict future land use designation in Collier County as of 2024. The figure shows more generalized categories of land use. The table includes more detail including finer subcategories of land designations along with percentage breakdowns for each designation, sorted by acreage.

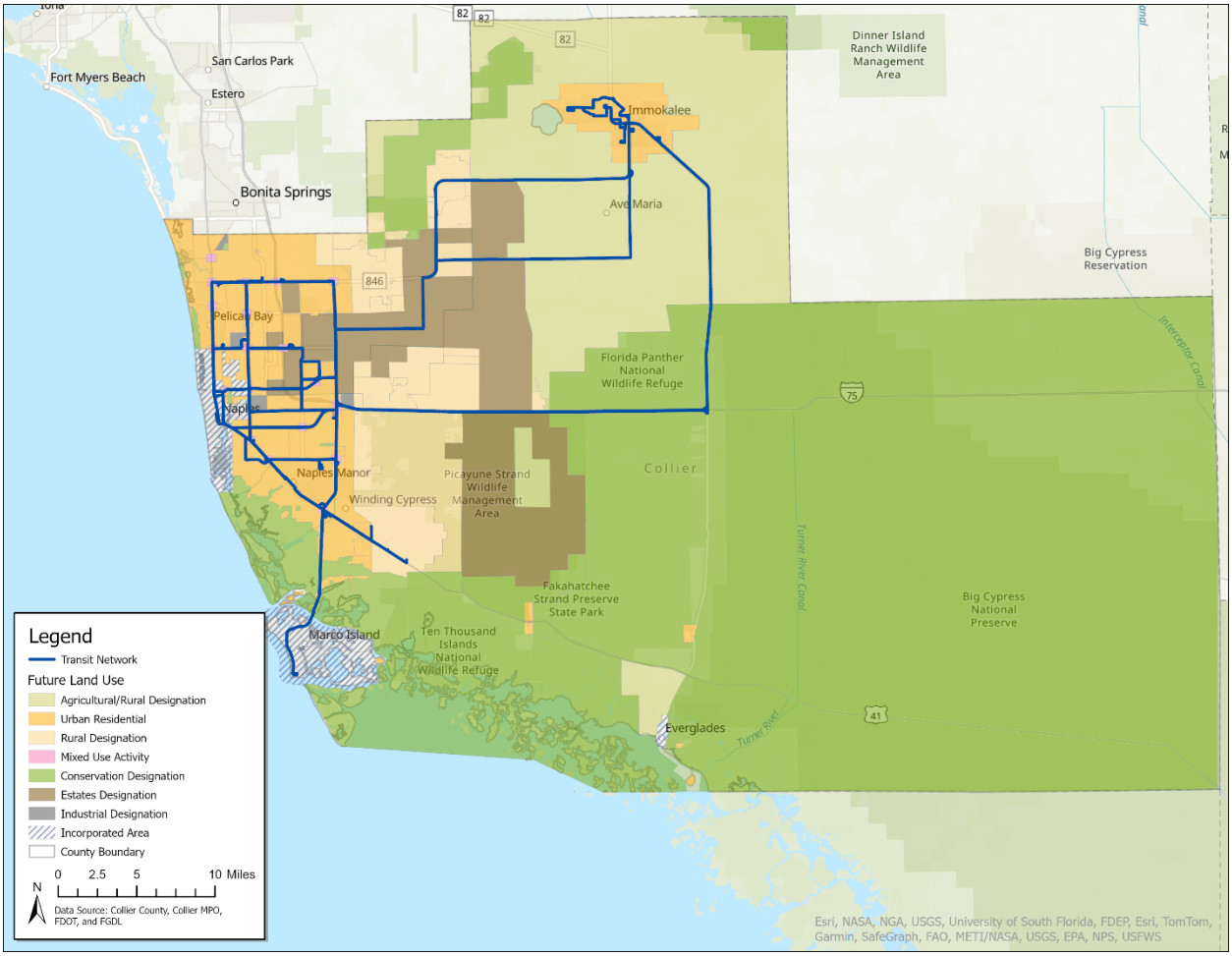


Figure 1-28: Future Land Use Designation in Collier County as of 2024

Table 1-6: Future Land Use in Collier County

Future Land Use	Acres	% of Area
Conservation	856,551	59%
Agricultural/Rural	257,645	18%
Estates Designation	101,302	7%
Residential Uses	95,936	7%
RF-Sending	44,843	3%
Incorporated Area	25,941	2%
RF-Receiving	22,672	2%
Urban Coastal Fringe Subdistrict	11,775	1%
RF-Neutral	8,836	1%
Mixed Use	3,079	<1%
Rural Settlement Area District	2,824	<1%
Immokalee Road Rural Village Overlay	2,778	<1%
Industrial District/Rural Industrial District	1,839	<1%
US 41 East Overlay	1,526	<1%
Bayshore/Gateway Triangel Redevelopment	1,190	<1%
Interchange Activity Center Subdistrict	454	<1%
Commercial	249	<1%
Livingston Rd/Veterans Memorial Blvd E Resi Subdistrict	36	<1%
Carman Drive Subdistrict	15	<1%
Orange Blossom/Airport Crossroads Comm'l Subdistrict	10	<1%
Corkscrew Island Neighborhood Coml Subdistrict	9	<1%
Ivy Medical Center Subdistrict	4	<1%
Total	**1,440,427**	**100%**

Source: Collier County GIS Hub

1.11 Commuter Travel Patterns

Understanding mode choices of commuters is essential to understanding the frequency and need of transit options in Collier County. In Table 1-7, journey-to-work characteristics and commuter flow patterns were compiled based on Census data for residents 16 years or older.

Table 1-7: Journey-to-Work Characteristics

Characteristic	2010	2020	2022
Place of Work			
Worked inside county	89.5%	89.3%	89.3%
Worked outside county	8.1%	8.4%	8.3%
Mode to Work			
Drive alone	75.3%	74.0%	74.0%
Carpool	12.3%	12.0%	10.9%
Public transit	1.6%	1.1%	0.5%
Walk	1.2%	1.1%	0.7%
Work at home	6.1%	9.4%	11.7%
Taxicab, motorcycle, or other means	2.5%	1.7%	1.7%
Travel Time to Work			
<10 minutes	11.6%	10.6%	10.0%
10-19 minutes	33.1%	29.7%	29.1%
20-29 minutes	24.2%	24.7%	24.9%
30-44 minutes	18.9%	22.2%	22.8%
45+ minutes	12.2%	12.8%	13.2%
Departure Time to Work			
6:00-8:59 AM	67.8%	65.9%	64.8%
Other times	32.2%	34.1%	35.2%

Source: 2010 5-year estimates, 2018 5-year estimates, 2022 5-year estimates

As shown in Table 1-7, more people work inside the county. As time passes, less people use public transit or walk and more work at home. A consistent percentage of people drive alone (74-75%). Travel times to work remain consistent, although longer commute times are steadily increasing. Finally, a consistent number of residents (around 65-67%) leave for work between 6AM-8:59AM.

1.12 Roadway Conditions

To be further evaluated.

2 Transit Performance

This section evaluates transit services in Collier County, including an overview of current services, trend analysis, and peer comparison. It examines existing transit operations, infrastructure, and other key providers. Additionally, it reviews performance trends over the past five years and compares CAT service with peers using standard criteria.

2.1 Existing Transit Services

2.1.1 FIXED ROUTE SERVICES

As of 2024, Collier Area Transit (CAT) operates 18 existing fixed routes bus routes services that operate throughout Collier County. CAT's service area largely consists of the urbanized part of Collier County, including the City of Naples and the City of Marco Island. Unincorporated rural communities in the County that receive transit service include Ave Maria and Immokalee. Service is provided 7 days a week, all year round except for 6 holidays. Daily service typically begins between 5:30 AM and 6:00 AM and ends later in the evening between 7:30 PM and 8:00 PM for most routes. No services are provided on major holidays, including on Thanksgiving Day, Christmas Day, New Year's Day, Memorial Day, Independence Day, and Labor Day. In 2023, the service's annual ridership was 729,767. CAT's services also include Route 600, also known as the LinC Lee-Collier which connects transit lines in Leeside County and Collier County. Route 600 is interlined with LeeTran's Route 240 and connects to LeeTran's Route 140.

Table 2-1 shows the existing transit lines in Collier County as of 2024.

Table 2-1: Existing Fixed-Route Services in Collier County

Count	Route	Services
1	11	US 41 – Creekside
2	12	Airport – Creekside
3	13	NCH – Coastland Mall
4	14	Bayshore – Coastland Mall
5	15	Golden Gate City
6	16	Golden Gate City
7	17	Rattlesnake – Edison College
8	19	Golden Gate Estates - Immokalee
9	19 Express	Golden Gate Estates - Immokalee
10	20	Pine Ride
11	21	Marco Island Connector
12	121	Express Immokalee to Marco Island
13	22	Immokalee Circulator
14	23	Immokalee Circulator
15	24	US 41 East – Charlee Estates
16	25	Golden Gate Parkway – Goodlette-Frank road
17	27	Immoaklee Road
18	600	Creekside Transfer Center – Coconut Point Mall

Source: Collier County Website

In addition to fixed-route services, CAT operates the Paradise Beach Trolley. This service runs every Friday, Saturday, and Sunday from mid-February to the end of April. It shuttles passengers from the Conner Park Parking Lot on Bluebill Avenue to Delnor-Wiggins Pass State Park and Vanderbilt Beach, operating from 8 am to 3 pm and from 4:30 pm to 7 pm. Figure 2-1 shows a map with the current transit routes in Collier County as of 2024.

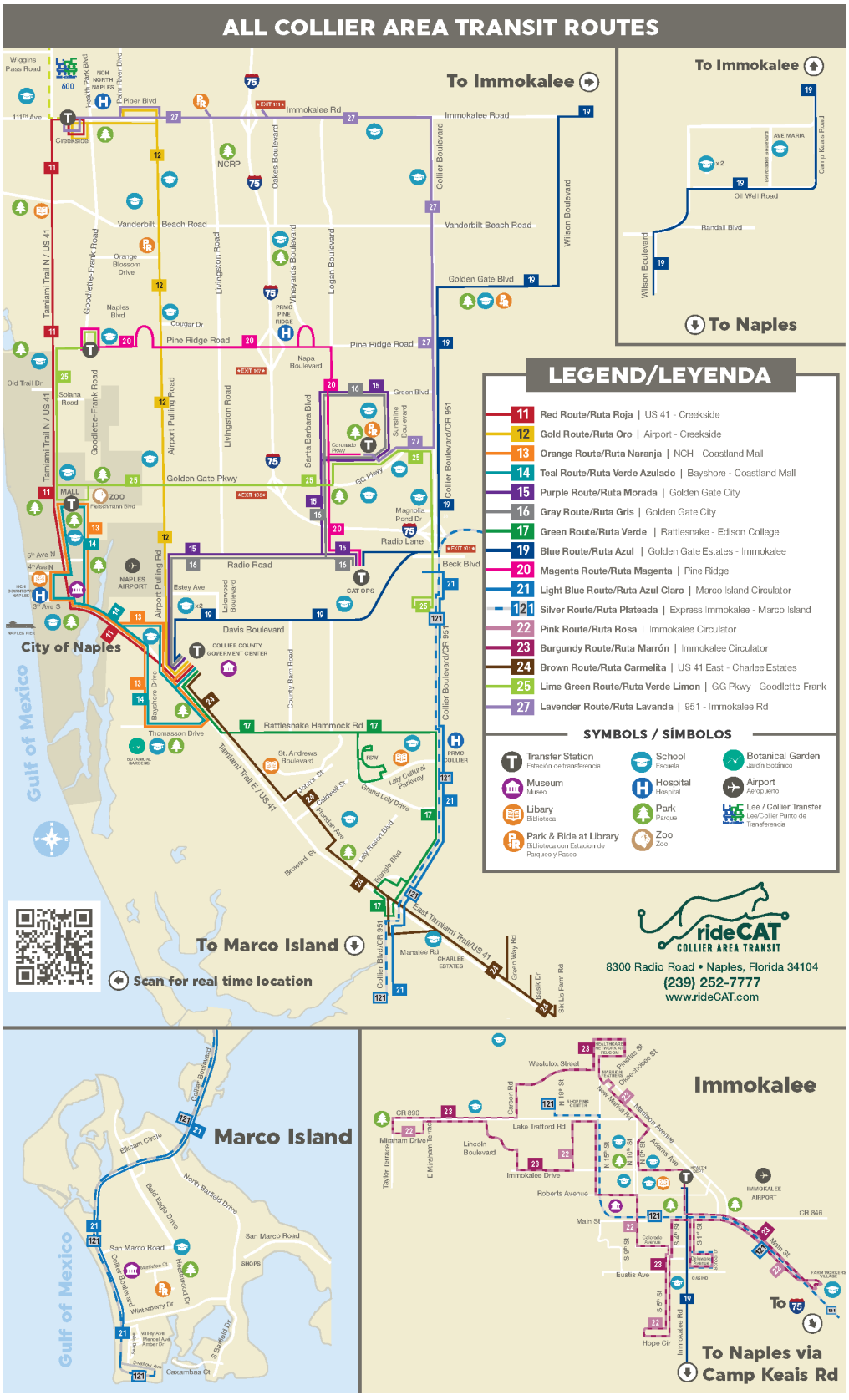


Figure 2-1: Existing CAT Services

2.1.2 PARATRANSIT SERVICES

Collier County also provides paratransit (shared ride, door-to-door) services with the CATConnect program for the Transportation Disadvantaged (TD) with funding from the Florida Department of Transportation, Agency for Persons with Disabilities and Florida Commissions for the Transportation Disadvantaged. Those who qualify for CATConnect include those under the Americans with Disabilities Act (ADA), visitors unable to use the CAT bus service and TD individuals. TD individuals are counted as those who because of a mental or physical disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to healthcare, employment, education, shopping, social activities, or other life-sustaining activities.

The CATConnect paratransit service is administered by Collier County Public Transit & Neighborhood Enhancement (PTNE) Division and provides shared, door to door transportation service for medical appointments, work, school and select other trips depending on the funding program requirements.

In the June 2024 CATConnect Paratransit Service Report, it was found that paratransit ridership was on an increasing trend, with a significant increase from 2022 to 2023 of 35.8%, see Figure 2-2. Collier County overall has 7% fewer vehicles that peer systems but higher passengers per trip compared to peer agencies.

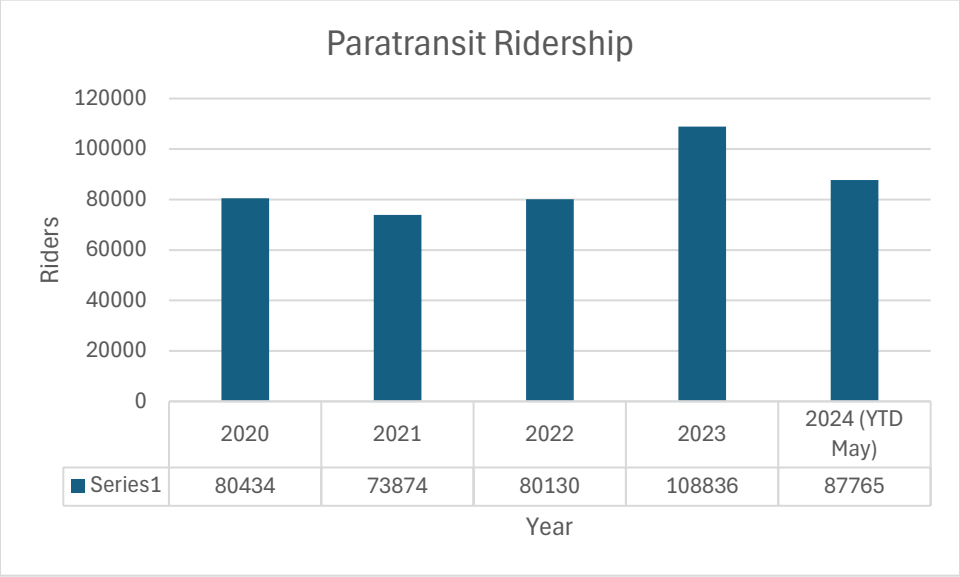


Figure 2-2: Paratransit Ridership

2.1.3 TECHNOLOGY SOLUTIONS

The 10-year transit development plan underscores the introduction of mobility-on-demand services as a top priority. In July 2021, CAT transitioned to the Ecolane scheduling software, replacing the previous RouteMatch system for paratransit services. This new system automates scheduling, dispatching, and real-time updates, enhancing operational efficiency and service reliability. Further enhancing user convenience, the CATconnect Mobile App launched in March 2022 allows passengers to schedule, monitor, and manage their trips. Additionally, CATCash has been integrated into the mobile app, providing a convenient account-based system for fare payments, and eliminating the need for cash handling on each ride. The app also allows users to view and edit trip details, as well as access records of past and upcoming trips.

In response to evolving transportation needs, CAT is exploring the use of electric shuttles as an environmentally friendly alternative to traditional buses. Additionally, the agency is considering ride-share-type alternatives to buses in certain areas to enhance flexibility and accessibility.

CAT has committed to upgrading its technology infrastructure, including the Computer Aided Dispatch/Automated Vehicle Locator (CAD/AVL) system, Mobile Data Terminals (MDT) for operators, Automatic Voice Annunciation (AVA) systems for ADA compliance, and Automated Passenger Counters (APC) for streamlined fare collection. These upgrades aim to integrate seamlessly with CAT's Mobile Ticketing system operated by Masabi using ITxPT standards, ensuring a cohesive and efficient transit experience for passengers.

2.1.4 FARE STRUCTURE

As of 2024, CAT uses Genfare fareboxes on all their transit vehicles which accept cash, reloadable smartcards, and paper transfer tickets. Mobile tickets for CAT buses can also be purchased on the RideCAT mobile application or Transit App.

The fare structure as of 2024 is presented in Table 2-2.

Table 2-2: Fare Structure in Collier County (2024)

Fare Category	Fare	Reduced Fare
One-Way	$2.00	$1.00
Children 5 years of age and younger	Free	Free
Marco Express	$3.00	$1.50
Transfers – up to 90 minutes	Free	Free
Day Passes	$3.00	$1.50
Smart Card Pass		
15-Day Pass	$20.00	$10.00
30-Day Pass	$40.00	$20.00
Marco Express 30-Day Pass	$70.00	$35.00
Discounted Pass		
Summer Paw Pass (Valid June 1 – August 31 for students. Price includes Smart Card)	$30.00	
30-Day Corporate/Perk Pass (300+ Employees)	$29.75	
Smart Card Media Fees		
Smart Card	$2.00	
Registration	$3.00	
Replacement with Registration	$1.00	

Source: RideCAT website; Collier County

The Reduced Fares are for members of Medicare, Disabled Community, those 65 years and older, children 17 and under, high school and college students and active / retired military personnel. ID is required. This fare would also apply to the subcontracted transportation provider with the Florida Commission for the Transportation Disadvantaged that provides transportation services under the non-emergency transportation Medicaid Contract for Collier County. Discount Passes are for persons eligible under the identified programs.

2.1.5 TRANSIT FACILITIES

There are currently two passenger transfer stations and five passenger transfer points provided on the CAT system. The first transfer station located at the Intermodal Transfer Facility also known as the Radio Road Transfer Station which is located at 8300 Radio Road in Naples as shown in *Figure 2-3*. This building is also a facility for the CAT Connect Paratransit program. At this facility, bus operations and bus transfers occur.



Figure 2-3: CAT Radio Road Transit Facility (Source: Google Street View)

The second passenger transfer station operated by CAT is the Government Center Transfer Station located at 3355 Tamiami Trail in East Naples, as shown in Figure 2-4 below, which accommodates pedestrians, cyclists, and "kiss-and-ride" passengers. This location provides in-person customer service, schedules, and pass sales, and is served by routes 11-17, 19, 22, and 24. Although parking is free, it is not an official park-and-ride site. The facility includes a busway with a turn-around, six sawtooth bus berths, a passenger platform with benches and trash receptacles, restrooms, snack machines, an air-conditioned lobby, and a customer service area.



Figure 2-4: Intermodal Transfer Station (Source: Google Street View)

Collier County plans to build a third transfer facility in the Immokalee Community on a vacant parcel owned by the county. The proposed site, approximately 1.7 acres in size, is currently a grass field adjacent to a green wooded area. It features an asphalt/concrete driveway providing access to the Health Department and a maintenance shed. The bus transfer station will enhance passenger and transit efficiency with new bus bays, canopy-covered shelters for passengers, a waiting platform with benches and trash receptacles, vending machines or options for food trucks, restroom facilities for passengers and drivers, and ADA improvements. Currently, passengers transferring at this location use a shelter located in a parking lot shared by visitors to the Health Department, County Library, and the David Lawrence Center.

Other transfer point locations within Collier County include Walmart Plaza; Pine Ridge and Goodlette-Frank Rd (Magnolia Square Plaza); Coastland Center; Creekside (Immokalee Road); and the Health Department in Immokalee. CAT also has dedicated parking spaces at the Orange Blossom Library, Golden Gate Parkway Library, Golden Gate Estates Library, Marco Island Library, and Immokalee Library.

In addition, the 2020 Park and Ride Study identified and prioritized sites for potential park and ride facilities. These facilities are designed to provide areas where commuters can park and access public transit, carpools, or vanpools, helping to address traffic congestion and parking constraints. The locations of these areas include Creekside, the Government Campus, Coastland Center Mall, Freedom Square, Physicians regional, the Golf Course near VA Hospital, Immokalee Health Department, Beach Lot at Pine Ridge Road, and Radio Road Transfer.

2.1.6 VEHICLE INVENTORY

Table 2-3 below provides a summary of the 74-vehicle fleet at CAT, with a breakdown by make and model and some key statistics. This represents a 155% increase in fleet size from 2013 when there were 29 vehicles. It is understood that even with this fleet size expansion, CAT still currently struggles to provide the services required, which is likely due to the large service that the agency serves.

The age of the fleet generally can be considered quite near end of life, with the average expected date of retirement only 2 years away in 2026 with many already being beyond their expected retirement age. With ongoing fleet electrification plans, it is likely that many of the fleet will be replaced in the near term with electric buses which would drastically improve the fleets lifespan.

Table 2-3: CAT Vehicle Inventory 2024

Make	Model	Vehicle Type	Number of vehicles	Average Miles/Yrs.	Average Cost	Average % Federal funding	Average Expected Date of Retirement
CHEVROLET			**5**	**42,893**	**$105,141**	**80%**	**2021**
	Glaval	D	5	42,893	$105,141	80%	2021
FORD			**33**	**47,160**	**$77,985**	**81%**	**2026**
	Challenger	D	15	51,191	$79,663	75%	2025
	Escape	F	1	6,543	$23,170	100%	2031
	F-150 XL	G	1	28,897	$21,888	100%	2029
	F-150 XLT	G	1	22,859	$26,200	92%	2028
	Glaval	D	4	58,034	$83,093	80%	2023

	Impulse	D	6	66,666	$82,161	80%	2026
	Taurus SEL	F	1	6,080	$26,667	73%	2029
	Transit	F	2	24,053	$22,874	100%	2030
	Villager 7.3L V8	C	2	21,902	$204,781	100%	2032
FREIGHTLINER			**1**	**25,265**	**$138,632**	**90%**	**2028**
	Legacy	C	1	25,265	$138,632	90%	2028
GILLIG			**31**	**63,453**	**$433,013**	**98%**	**2028**
	G27B102N4	A	10	69,016	$393,761	98%	2026
	G27D102N4	A	3	84,276	$410,091	98%	2026
	G27E102H2	A	4	24,542	$476,193	100%	2035
	G27E102N2	A	12	68,768	$440,861	96%	2031
	G30B102N4	A	2	50,336	$530,207	100%	2022
VPG			**4**	**18,749**	**$50,173**	**80%**	**2020**
	MV1	F	4	18,749	$50,173	80%	2020
Total System			**74**	**51,866**	**$227,864**	**88%**	**2026**

(Source: Collier Area Transit Vehicle Inventory Report-1st Half February 2024)

2.1.7 SAFETY

There isn't much discussion of the safety and security in any of these documents. It's a required expenditure under the FTA grants. Annually 5307 grants must commit 1% of their federal allocation to safety and security improvements. It may be helpful to add this point – open to discussion.

2.1.8 ON-BOARD SURVEYS

Documentation of trends between our 2019 and 2024 on-board surveys with a transit user market data summary

2.1.8.1 Survey Characteristics

To be further evaluated.

2.1.8.2 Trip Purpose

To be further evaluated.

2.1.8.3 Origin and Destination Characteristics

To be further evaluated.

2.1.8.4 Passenger Travel Characteristics

To be further evaluated.

2.1.8.5 Transit Dependency

To be further evaluated.

2.1.8.6 Passenger Demographic Information

To be further evaluated.

2.1.9 PLACEHOLDER FOR PRIVATE BUS DISCUSSION

To be further evaluated.

2.2 Comprehensive Operations Analysis 2021 - Recap

The purpose of a Comprehensive Operations Analysis (COA) is to review the transit network and assess how best the agency can improve services and efficiency, particularly in relation to day-to-day operations. This assists with increasing value for the agency and ensuring that the transit system is as effective and efficiency as possible in the shorter term. Generally, the COA is thought of as feeding into the TDP where the TDP sets the longer-term strategic goals and identifies the needs help the transit system grow, evolve, and improve overtime.

The COA conducted in 2021 analyses the fine details of the transit operations, assessing elements such as service enhancements and optimization. This can include repurposing routes, moving service from less productive areas and routes, and enhancing well performing routes.

The key takeaways in relation to route optimization from the extensive analysis undertaken in the COA that have been implemented to date are summarized below:

- Elimination of Route 12B – low productivity and requires additional bus

- Re-alignment of Route 19 - Maintain service on Collier Boulevard and Immokalee Road with select trips to Ave Maria via Oil Well Road
- Route 21 alignment changes – maintaining service on Collier Boulevard between Marco Island and Walmart but removing service on San Marco Road.
- Route 25 alignment changes – A low ridership route moved to travel on US41 between Pine Ridge Road and Golden Gate Parkway. Removing service on Collier Boulevard and Goodlette Frank Road
- Removal of Route 28 – consolidating Route 28 with Route 19.
- Route consolidation of 20 and 26. Routes 20 and 26 were the two lowest performing routes in terms of trips per revenue hour. By combining, all day service can be provided at 90minute frequency.

2.3 Transit Usage

2.3.1 ROUTE RIDERSHIP BY MONTH

Trends for the FY2020-FY2023 years are assessed in this section. Only routes active in 2024 are displayed in the graphs below. Ridership per month from the most recent full financial year is presented below in Figure 2-5 below.

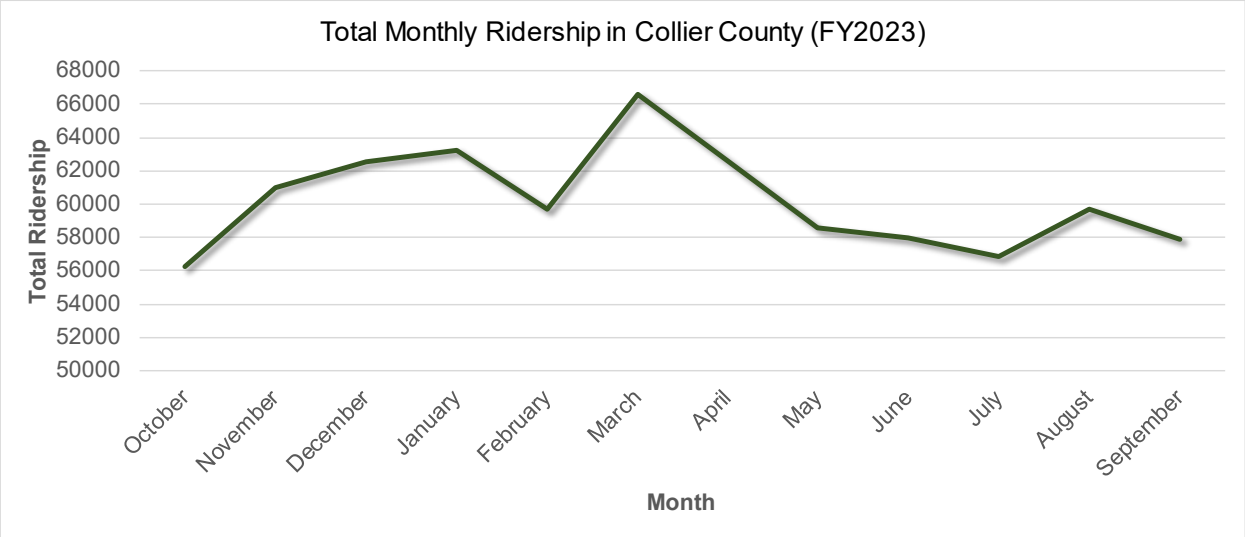


Figure 2-5: Total Monthly Ridership in Collier County during FY2023

As seen from the graph above, total ridership peaks in the holiday season (December-January) and March. Ridership then dips starting in May as the peak tourist and visitor season declines. This trend could indicate that more tourists are populating the buses during the peak seasons.

Figure 2-6 displays the total ridership for each route throughout the 2023 fiscal year.

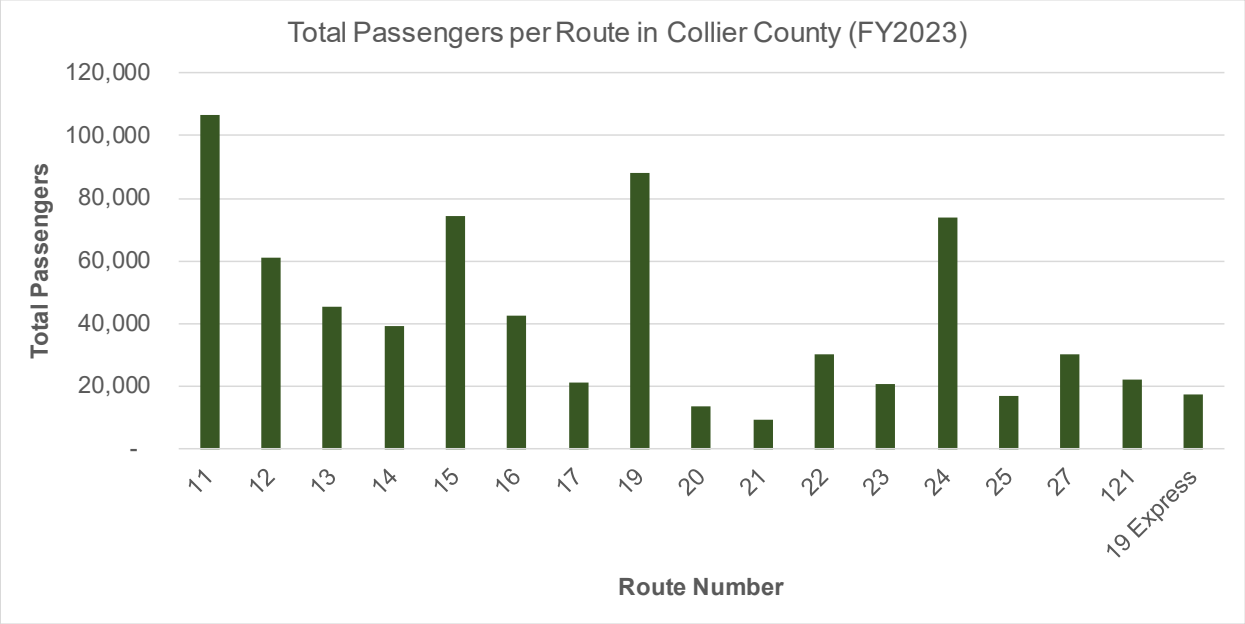


Figure 2-6: Total Passengers per Route in Collier County during FY2023

When examining the total number of passengers per route, Routes 11, 19, and 24 are the three most well-used routes. This is logical, as Route 11 passes through the Central Business District (CBD) in Naples, Route 19 is the only route serving Immokalee, and Route 24 serves the Collier County Government Center.

In contrast, Routes 20, 21, and 25 are the least used routes, presenting opportunities to reroute or merge them to better accommodate demand.

Figure 2-7 below shows a graph of the passengers per revenue hour in Collier County.

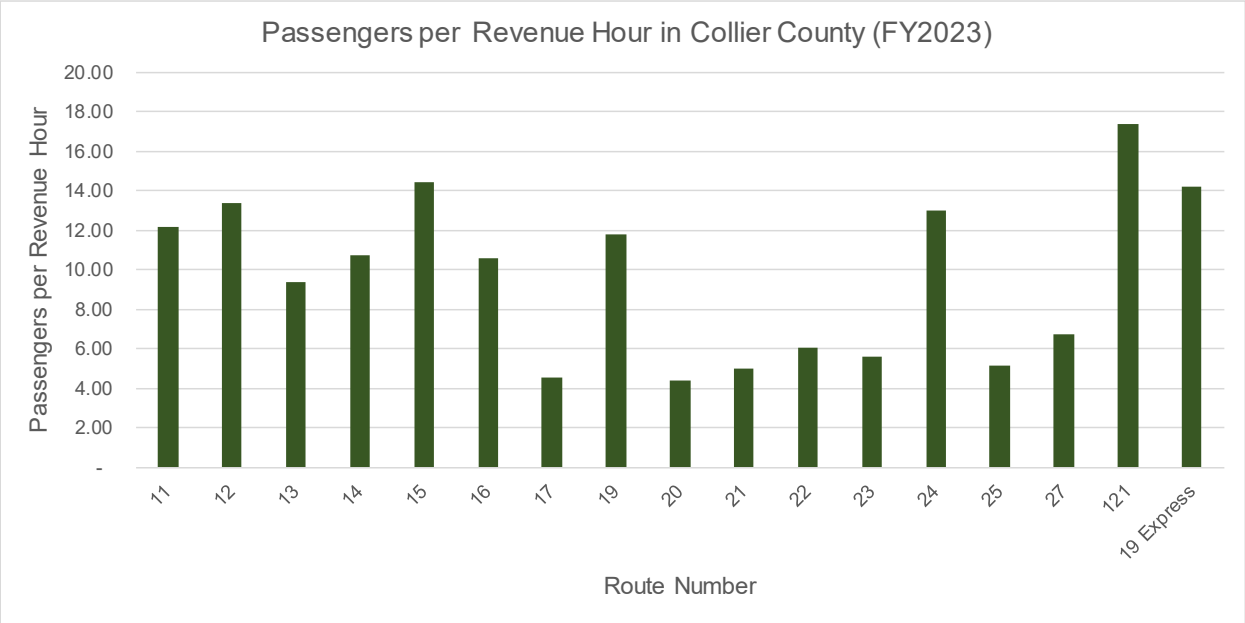


Figure 2-7: Passengers per Revenue Hour in Collier County during FY2023

Routes 121, Route 19 Express and Route 15 have the highest number of passengers per revenue hour, indicating that these routes may serve areas with higher transit dependency or demand and have schedules and frequencies of these routes likely align well with passenger needs. Routes 17, 20 and 21 have the lowest passengers per revenue hour. CAT might consider reallocating resources from low-performing routes to high-performing ones or to support the high-performing routes with increased frequency or extended hours. There may be opportunities to adjust the low-performing routes to better serve potential riders or connect to more popular destinations.

In Figure 2-8 below, ridership was averaged by season to determine seasonal variations for each route.

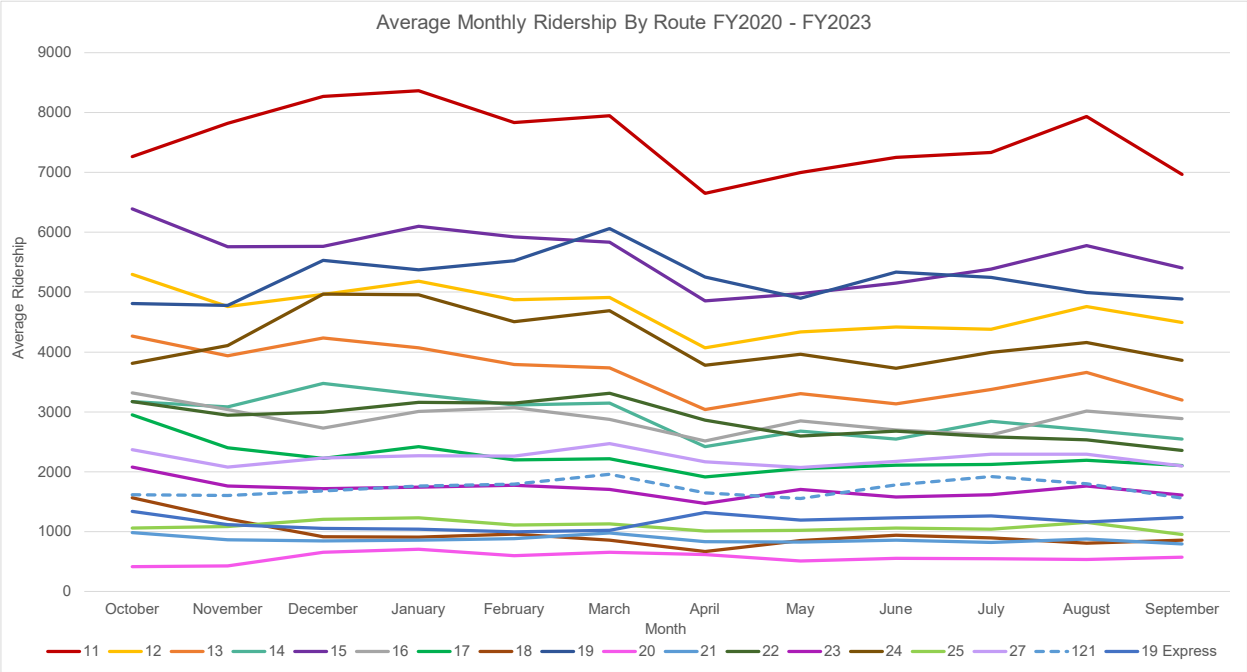


Figure 2-8: Seasonal Variation of Average Monthly Ridership

Other than Route 29, which is the beach shuttle with ridership only during the winter, most routes do not show significant seasonal variation. Route 29 also has lower ridership compared to other routes. Despite winter being a peak tourist season, the lack of significant ridership fluctuations suggests that tourists and seasonal residents may not be heavily utilizing the public transit system. This could be due to several factors like higher spending power of tourists visiting a wealthy area like Collier County. While ridership in the winter tends to be slightly higher than in the later months, promoting transit use among visitors and residents requires improvements to the accessibility and visibility of transit information. For instance, offering a transit pass could incentivize visitors to use the public transportation system.

Figure 2-9 and Figure 2-10 highlight the routes with the highest ridership and riders per revenue hour, focusing on those within or near the core of the city, such as Naples or the Naples Airport. Notably, routes 11, 12, 15, 19, 24, and 121 were selected for this analysis for these reasons.

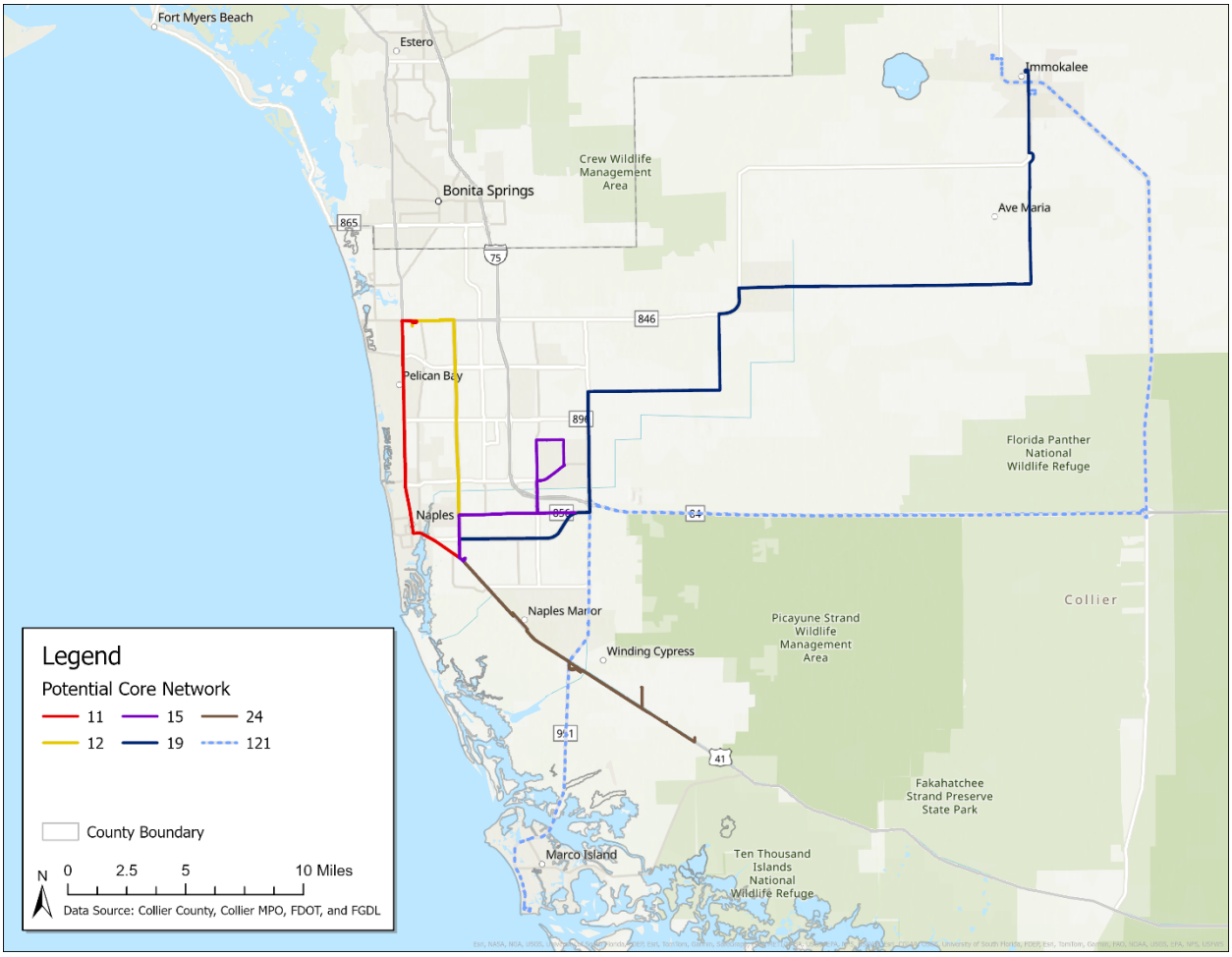


Figure 2-9: Top Ridership Routes in Collier County in FY2023

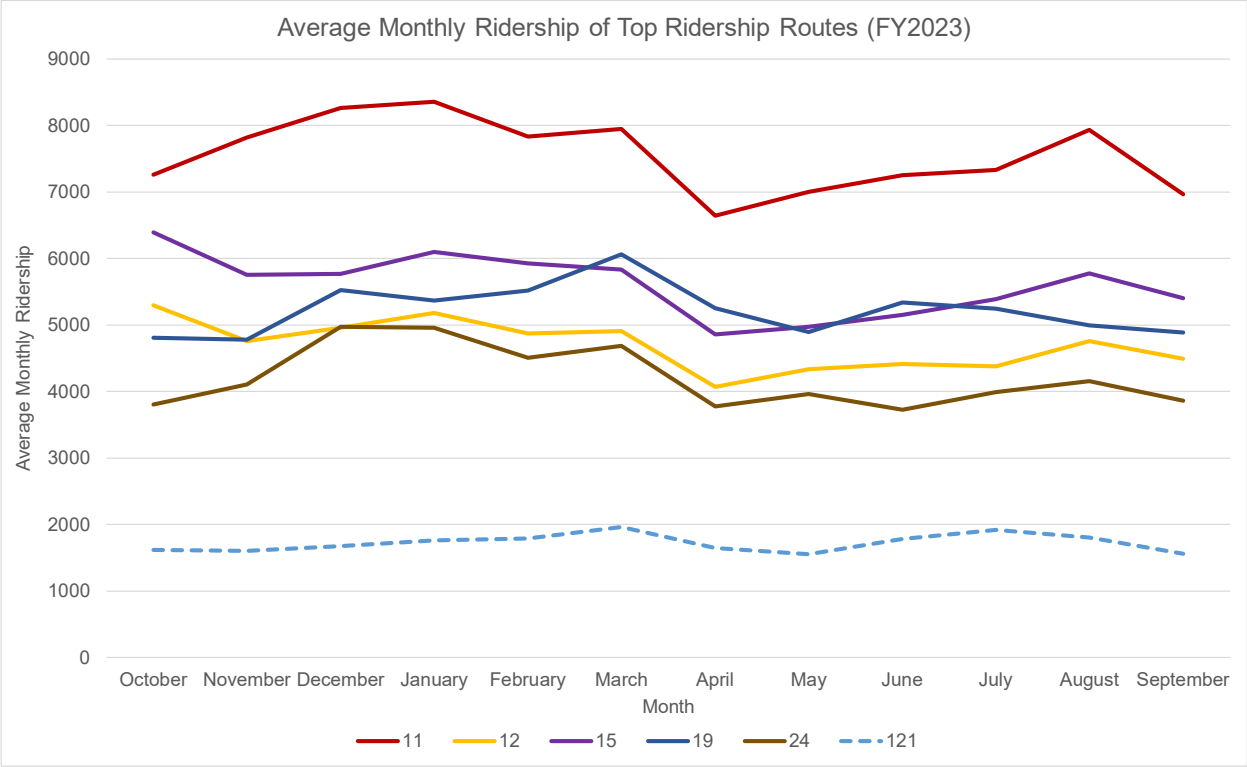


Figure 2-10: Average Monthly Ridership of Top Ridership Routes in Collier County in FY2023

The ridership pattern for these potentially "core" routes is highest between October to February, during the winter season. Ridership dips in April at the end of the peak tourist season. The ridership pattern suggests that tourists and seasonal residents may be contributing to increased usage of these core routes during the peak winter season. This aligns with the general tourism patterns in Collier County.

2.3.2 ROUTE PRODUCTIVITY

To be further evaluated using APC data.

2.4 Trend and Peer Comparison Analysis

This section provides the results of the trend analysis of key performance, effectiveness, and efficiency measures for the CAT system for the past 5 years. In addition, comparisons have been provided to peer agencies to show how CAT stacks up against similar systems.

This evaluation was conducted using data directly from the National Transit Database (NTD) across several different variables for transit performance. These system performance measures are recommended by the FDOT TDP Handbook for general performance, efficiency, and effectiveness, as listed and categorized in the table below.

Table 2-4: System Performance Review Measures

Performance Measures	Effectiveness Measures	Efficiency Measures
Unlinked Passenger Trips	Unlinked Passenger Trips per Capita	Operating Expense per Capita
Passenger Miles Travelled	Passenger Miles Travelled per Capita	Operating Expense per Unlinked Passenger Trip
Vehicle Revenue Miles	Vehicle Revenue Miles per Capita	Operating Expense per Passenger Miles Travelled
Vehicle Revenue Hours	Unlinked Passenger Trips per Vehicle Revenue Mile	Operating Expense per Vehicle Revenue Miles
Vehicles Operating/Available at Maximum Service	Unlinked Passenger Trips per Vehicle Revenue Hour	Operating Expense per Vehicle Revenue Hours
Operating Expense		Vehicle Revenue Miles per Vehicle
Fare Revenue		Farebox Recovery Ratio
		Average Fare

The peer selection process followed the methodology provided by the Transit Cooperative research Program (TCRP) Report 141: A Methodology for Performance Measurement and Peer Comparison in the Public Transportation Industry and recommended by the FDOT TDP Handbook (2022).

The guidance recommends a minimum of 4 agencies and for the purposes of this TDP, 12 agencies have been selected for a first level assessment. It is crucial to make sure that the right peer agencies are selected to provide credible comparisons that can provide insight and trigger action, compared to badly chosen peers which can produce irrelevant results.

An initial peer group should be formed of agencies that are similar to CAT and then likeness scores calculated to determine similarity and appropriateness. For this TDP update, all previous agencies that were included in the prior TDP update were included as well as additional agencies that were deemed to be similar in nature to CAT. This initial long list consisted of:

Table 2-5: Transit System Peer Review Selection

Transit System	Location
The M (Montgomery Area Transit)	City of Montgomery, AL
TTA (Tri-State Transit Authority)	Huntington, WV
The Wave Transit System	City of Mobile, AL
ART (Asheville Redefines Transit)	City of Asheville, NC
GCT (Gwinnett County Transit)	Lawrenceville, GA
PCPT (Pasco County Public Transportation)	New Port Richey, FL
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL
LeeTran (Lee County Transit)	Fort Myers, FL
Bayway (Bay County Transportation)	Pensacola, FL
Indian River County	Vero Beach, FL
Lakeland Area Mass Transit District	Lakeland, FL

It is acknowledged as part of the methodology that peers will not be exactly like one another in all categories and the approved methodology is built to allow for that and allow for similarity in only a few other categories.

Stage 2 Peer Comparison

To be further evaluated.

2.4.1 PERFORMANCE MEASURES

Data for select system characteristics were taken from NTD to assess the general operating performance of the CAT system and its chosen peers. All of the performance indicators are based on exact data values from the NTD database without any additional calculation or alteration.

2.4.1.1 Unlinked Passenger Trips

Unlinked passenger trips (UPT) refer to the number of people riding only one public transit vehicle from origin to destination, counting a new trip each time a vehicle is boarded no matter how many transfers are made. UPT data represents the market demand for service, and a higher number of passenger trips is considered a positive metric. UPT numbers for CAT decreased by almost 30% from 0.95 million trips in 2018 to 0.65 million in 2021 but increased to 0.75 million in 2022. The growth in trips from 2021 to 2022 suggests service improvements have started to take effect as ridership has returned following the COVID pandemic.

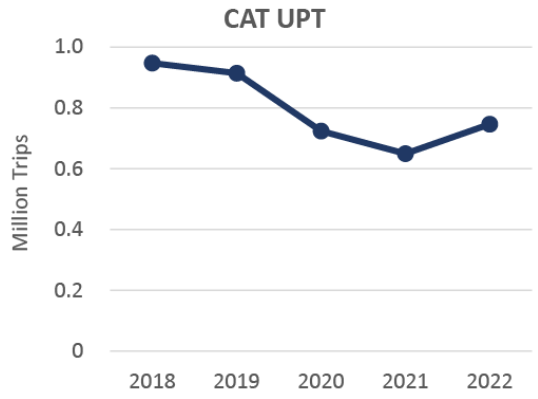


Figure 2-11 Unlinked Passenger Trips trend

2.4.1.2 Passenger Miles Travelled

Passenger miles travelled (PMT) denotes the total distance travelled by all passengers using the service. As with UPT, higher PMT is also a positive metric. PMT numbers for CAT follow the same trend as the UPT numbers, decreasing about 30% from 7.4 million miles in 2018 to 5.3 million in 2021, but increasing to 6.1 million in 2022. This is directly reflective of passenger trips which is to be expected.

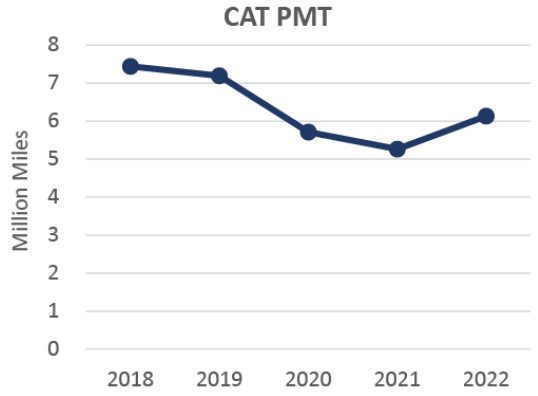


Figure 2-12 Passenger Miles Travel trend

2.4.1.3 Vehicle Revenue Miles

Vehicle revenue miles (VRM) detail the total distance travelled where the transit service was operating in revenue service, which excludes deadhead travel, training operations, and charter services. VRM as a metric itself is not indicative of positive or negative performance and should be analyzed in relation to productivity and cost-effectiveness measures. The slightly decreasing trend in vehicle revenue miles suggests that services are being withdrawn, and with the lack of riders and passenger miles in 2020 and 2021 but a relatively stable amount of service being provided suggest that a major cost recovery issue would have occurred that is likely still impacting the agency.

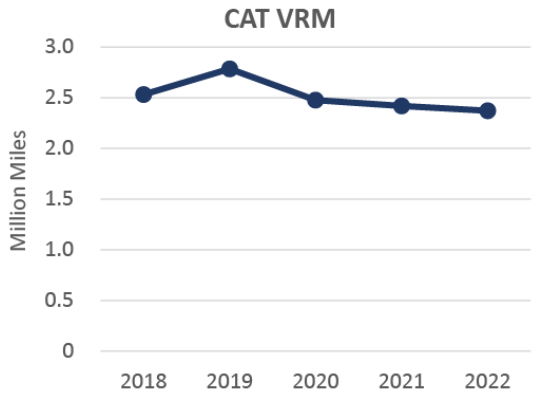


Figure 2-13 Vehicle Revenue Miles trend

2.4.1.4 Vehicle Revenue Hours

Vehicle revenue hours (VRH) represent the total travel time that transit vehicles have operated during revenue service. Like with VRM, VRH as a metric itself is not indicative of positive or negative performance and should be analyzed in relation to productivity and cost-effectiveness measures. Given than VRH has gone up slightly compared to decreasing VRM, this would suggest that routes that serve longer distances and cover more miles, possibly towards more rural areas have been restricted and instead shorter routes with more service has replaced it.

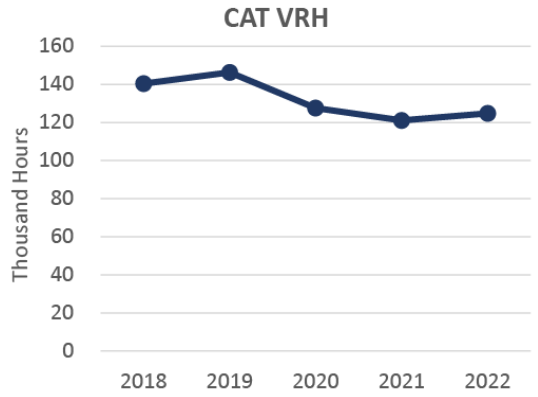


Figure 2-14 Vehicle Revenue Hours trend

2.4.1.5 Vehicles Operating/Available at Maximum Service

Vehicles operating or available at maximum service counts the number of vehicles that are required for (VOMS) or are available to (VAMS) the transit agency to operate at peak full service. VOMS is important for assessing fleet size, directly relating to the network structure and availability of service. VOMS/VAMS numbers can impact the number of routes and frequency of service offered by the transit agency. VOMS helps to determine the required vehicle demand during maximum service versus the vehicles available. Given that VAMS have decreased and VOMS has increased since 2021 to 2022, this would suggest that CAT are operating very close to the line in terms of not having enough vehicles to provide service.

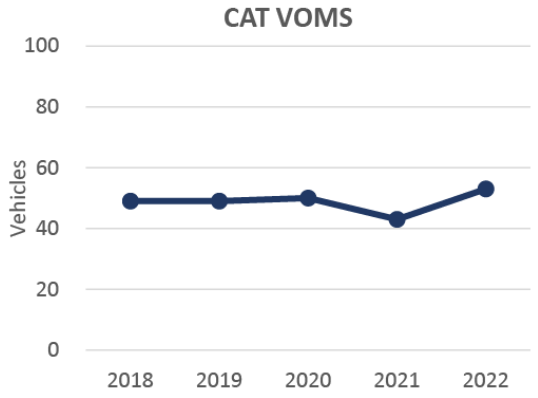


Figure 2-15 Vehicles Operating in Maximum Service trend

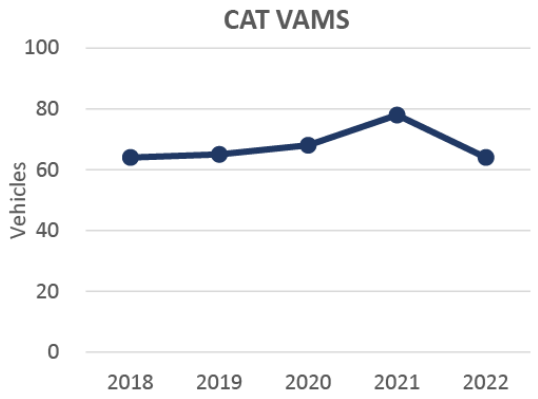


Figure 2-16 Vehicles Available in Maximum Service trend

2.4.1.6 Operating Expense

Total operating expensive considers all costs associated with operating the transit service, including operational, maintenance, and administrative costs. Operating expenses have shown a general increase in trends since 2018 which is to be expected as service gets more expensive to deliver. Operating expense should be analyzed in relation to fare revenue and farebox recovery rates to determine how much of the cost of the service is being recuperated.

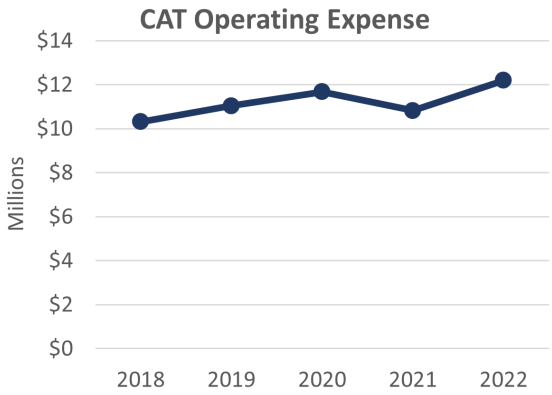


Figure 2-17 Operating Expense trend

2.4.1.7 Fare Revenue

Fare revenue is the total amount of revenue generated from fare-paying transit service users. Ignoring the blip in 2020 with the COVID-19 pandemic, since then fares revenue has been steadily increasing which would be in line with passenger trips also increasing. As with operating expense, fare revenue is at its most useful when analyzed in relation to operating expense and farebox recovery rates.

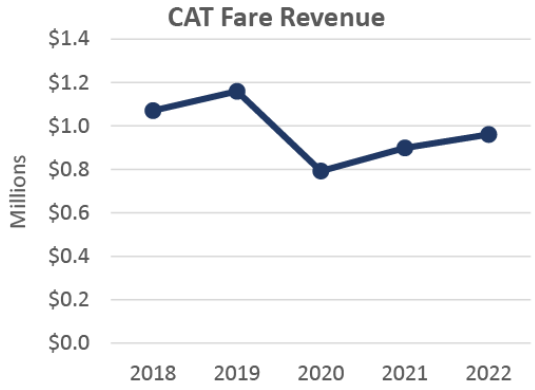


Figure 2-18 Fare Revenue trend

2.4.2 EFFECTIVENESS MEASURES

Service effectiveness is represented by performance characteristics in relation to the population, as the selected indicators demonstrate to what extent service-related goals are being achieved. This includes service supply, service consumption, and quality of service.

2.4.2.1 Unlinked Passenger Trips/Passenger Miles Travelled per Capita

UPT per capita is calculated by dividing UPT by the service area population, measuring transit usage within the service area. Similarly, PMT per capita is derived from dividing PMT by the service area population. Higher values represent a greater utilization of service.

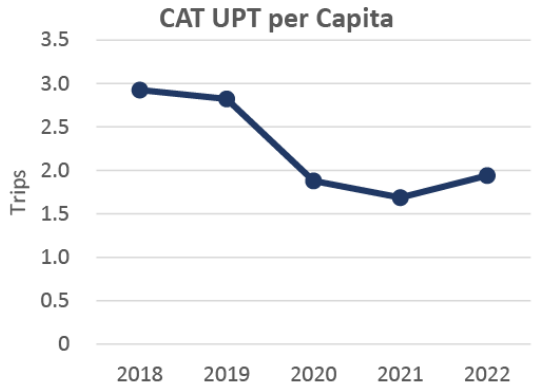


Figure 2-19 Unlinked Passenger Trips per Capita trend

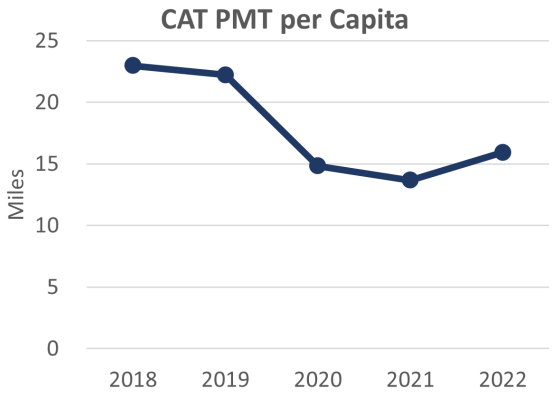


Figure 2-20 Passenger Miles Travelled per Capita trend

2.4.2.2 Vehicle Revenue Miles per Capita

VRM per capita is calculated from the dividing VRM by the service area population, measuring the supply of service provided based on the population of the service area.

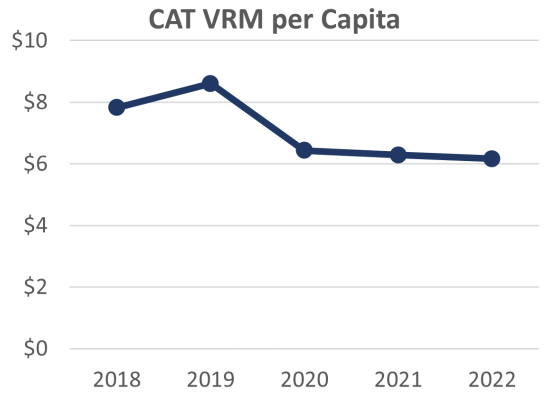


Figure 2-21 Vehicle Revenue Miles per capita trend

2.4.2.3 Unlinked Passenger Trips per Vehicle Revenue Mile/Vehicle Revenue Hour

Dividing UPT by VRM or VRH can serve as other indicators for productivity and service consumption, measuring the utilization rates per unit of provided service. Higher values are desirable as it reflects that there is greater utilization of service.

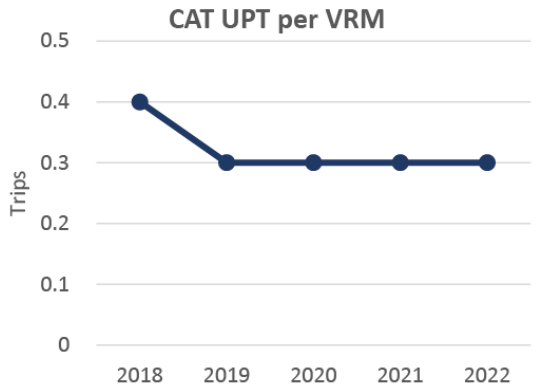


Figure 2-22 Unlinked Passenger Trips per Vehicle Revenue Mile trend

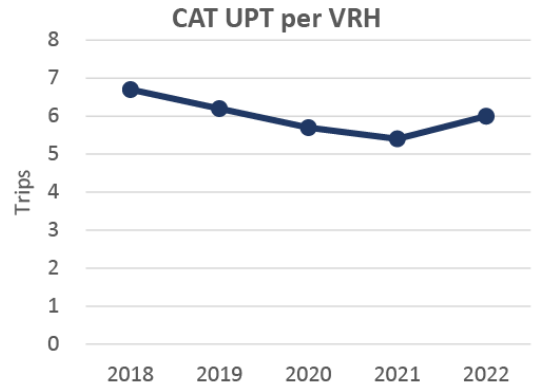


Figure 2-23 Unlinked Passenger Trips per Vehicle Revenue Hour

2.4.3 EFFICIENCY MEASURES

Service efficiency revolves mostly around operating expenses and a few other indicators, in essence, how much it costs to provide and run the service. Most of the efficiency measures are calculated by dividing the total operating expense by other performance measures.

2.4.3.1 Operating Expense per Capita

Operating expense per capita reflects the total investment spent on provided transit services in relation to the service area population. The metric itself reflects greater investment in transit with higher values, however, there are many additional underlying considerations including productivity, demand, and utilization.

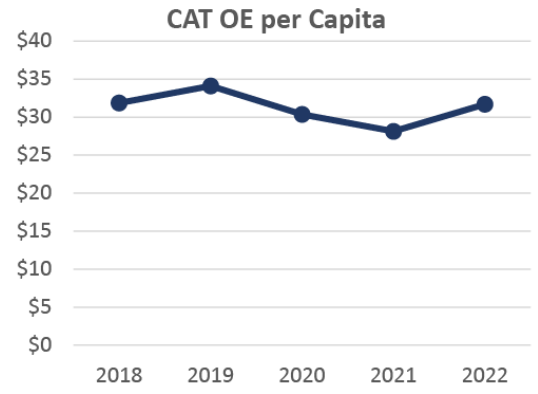


Figure 2-24 Operating Expense per Capita trend

2.4.3.2 Operating Expense per Unlinked Passenger Trip/Passenger Mile Travelled

This metric indicates the average cost to provide service for each UPT/PMT, showcasing the market demand for the service and how service is delivered. The lower these values, the better, as it is ideal to minimize cost per trip.

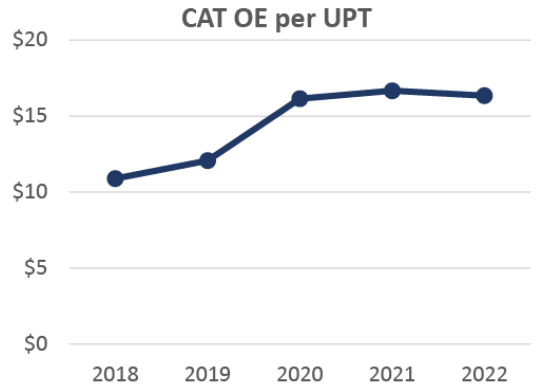


Figure 2-25 Operating Expense per Unlinked Passenger Trip trend

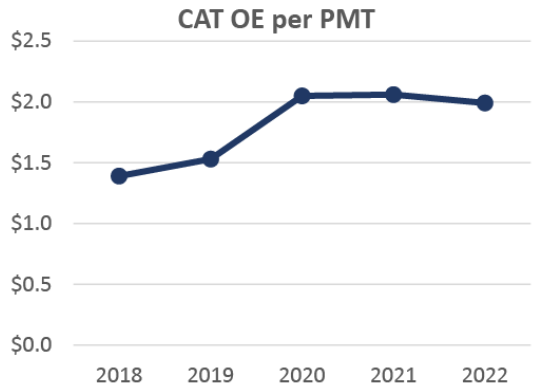


Figure 2-26 Operating Expense per Passenger Mile Travelled trend

2.4.3.3 Operating Expense per Vehicle Revenue Mile / Vehicle Revenue Hour

These metrics are average cost calculations for every service mile or hour, evaluating the efficiency of transit service delivery.

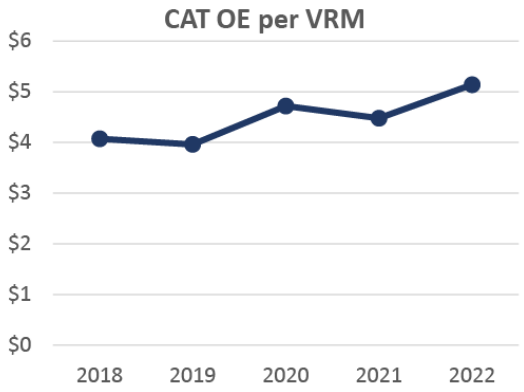


Figure 2-27 Operating Expense per Vehicle Revenue Mile trend

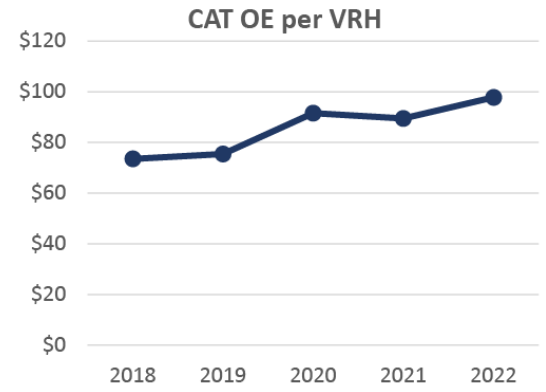


Figure 2-28 Operating Expense per Vehicle Revenue Hour trend

2.4.3.4 Vehicle Revenue Miles per Vehicle

VRM per vehicle is the average service provided by each vehicle in operation during maximum service, derived from dividing VRM by VOMS. It is an indication of vehicle utilization, but there are other contextual considerations to be made including fleet size and age.

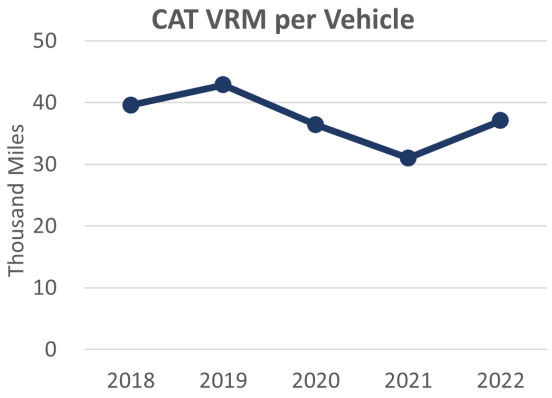


Figure 2-29 Vehicle Revenue Miles per Vehicle trend

2.4.3.5 Farebox Recovery Ratio

Farebox recovery ratio is the percentage of the total operating expenses that are funded by fare revenue from service users, equating fare revenue over operating costs. Higher farebox recovery is desired as that means a greater percentage of the operating costs are covered by passengers compared to other funding sources. The farebox recovery ratio of approximately 8% demonstrates a low level of recovery and therefore a transit network that is costing the federal government a lot to operate.

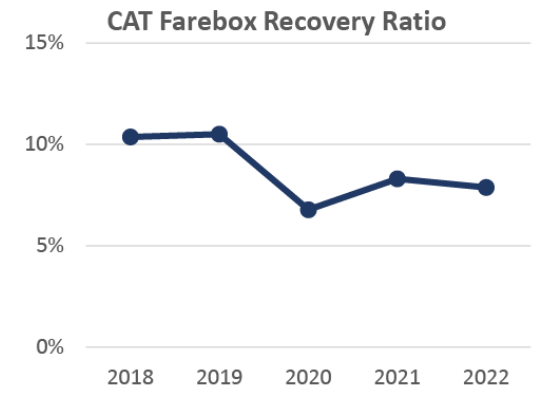


Figure 2-30 Farebox Recovery ratio trend

2.4.3.6 Average Fare

Average fare is the average amount paid per passenger per trip and is calculated by dividing fare revenue by UPT. The metric itself is not necessarily indicative of performance but is a good comparison to other transit systems in terms of fare cost.

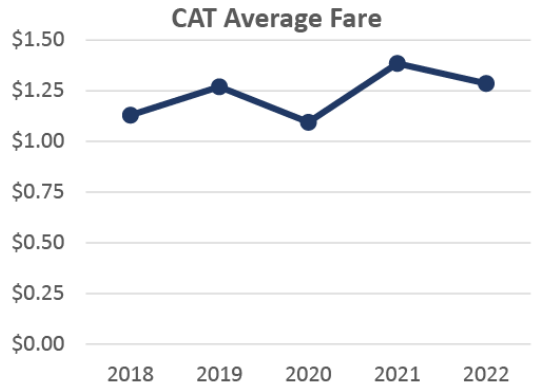


Figure 2-31 Average Fare trend

2.4.4 KEY FINDINGS

Generally, there seems to be a consistent pattern within the past 5 years amongst majority of the performance measures. The values decreased from 2018 to 2021 but increased in 2022. It is likely that the Covid-19 pandemic had a significant impact on the CAT transit system performance in those years, especially in 2020 at the start of the pandemic, which would explain why several metrics saw steeper decreases from 2019 to 2020 compared to the other years. 2021 likely saw increases as the transit systems learned how to handle and plan around the pandemic.

Additional findings to be reported as analysis is completed.

Date: **July 1, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Local Plans, Policies, and Programs – Review Required

The guidance provided by the FDOT requires, at a minimum the TDP be consistent with the Florida Transportation Plan, local government comprehensive plans, and the local MPO's LRTP. Plan coordination and implementation is a key element of the TDP. When completed, the TDP will coordinate with the goals and objectives of Collier County's comprehensive plans and that of the local governments including Marco Island, City of Everglades City, and the City of Naples.

Plan Review

The Transit Development Plan builds on the review of relevant local, state, and federal plans, studies, and policies identified. Connecting policies and practices across various partnerships strengthens the TDP, the resulting recommendations, and the future planning of transit service. Many of the plans reviewed are updated periodically. Where possible to most current updates are referenced for review.

The various plans identified provide context for transit service and how Collier Area Transit (CAT) meets the expectations of its various and diverse stakeholders. To evaluate and capture how transit service is accounted for in various planning documents, the analysis is broken down into local plans, regional plans, and state and federal plans.

The plans review section includes an accompanying table of plans and key policy recommendations which will support the analysis and resulting recommendations.

Local Plans

Various local municipalities within Collier County, as well several public agencies develop transportation plans which include references to transit, rely on transit in Collier, or include CAT service. These plans include Comprehensive Plans

- City of Naples Comprehensive Plan (2023)
- City of Marco Island Comprehensive Plan (2021)
- City of Everglades City 2045 Comprehensive Plan (2022)
- Collier County Comprehensive Plan (2023)
- CAT Ten-Year Transit Development Plan 2021 – 2030 (2020)
- CAT TDP FY 2022 Annual Progress Report (2023)
- Collier MPO Bicycle Pedestrian Master Plan (2019 and 2022 update)

- *CAT Comprehensive Operations Analysis - July 2021 – in review*
- Collier County Transportation Disadvantaged Service Plan (2023)
- Collier County Transit Impact Analysis (2020)

Regional Plans

- Collier County 2045 Long Range Transportation Plan (2020)
- CAT Regional Service and Regional Fare Study (2024)
- Strategic Regional Policy Plan SWFRPC (2011)

State and Federal Plans

- Florida Transportation Plan 2055 FTP (2020)
- Florida State Management Plan (2023)
- FDOT Design Manual (2024)
- *Moving Florida Forward – Infrastructure Initiative (2023) – in review*
- Fixing America's Surface Transportation (FAST) ACT (2015)
- The Infrastructure Investment and Jobs Act (IIJA), also known as the Bipartisan Infrastructure Law (BIL) (2021)
- *Implications to Public Transportation of Emerging Technology (2016) NCTR – in review*

Additional plans and laws maybe added throughout the review process and development of recommendations in the TDP.

EXECUTIVE SUMMARY
Reports and Presentations
Item 6b
Marco Island Trolley Pilot

Objective:
To update the Committee on the pilot of the Marco Island Trolley route to be introduced to Marco Island.

Considerations:
Collier Area Transit (CAT) along with the City of Marco Island, are looking to introduce a trolley route to the island, with two busses, circulating every day on a roughly 20 minute frequency.

Following conversations with Marco Island Councilman, Rich Blonna, and many representatives of the business community on Marco, CAT is planning to introduce a 3-month pilot to Marco Island. The goal of this pilot is to test the viability of a trolley service on the island to reduce traffic and parking woes that have been cited as an increasing problem throughout the island.

The trolley service is proposed to begin in January 2025, running from 9 AM – 9 PM. The attached route map shows the proposed route spanning from the Rose Marina on the north side of the island, to Caxambas Park at the south side of the island, travelling along Collier Blvd. The route is planned to stop at Veterans Community Park and existing beach access points along Collier Blvd.

Recommendation:
None

Attachment:
Marco Island Trolley Route Map

Prepared by: _____ **Date:** 8/12/2024
Alexander Showalter, Planner II

Approved by: _____ **Date:** 08/12/2024
Brian Wells, PTNE Division Director

Proposed Marco Island Trolley Route



Route Description: Start and End points are switched on map. Proposed trolley route will start from Veterans Park, going south on Collier Blvd, looping back at Caxambas Park, traveling north on Collier Blvd, and servicing the Rose Marina on the north end of Marco Island before returning to Veterans Park as a layover spot with restrooms for the drivers.

EXECUTIVE SUMMARY
Reports & Presentations
Item 6c
Construction Update

Objective:
To update the committee on the ongoing and upcoming transit facilities projects.

Considerations:
Collier County Public Transit and Neighborhood Enhancement (PTNE) Project Manager, Liz Soriano, will be providing the committee an update on recently constructed, in progress, and upcoming facilities projects and improvements.

Recommendation:
None.

Attachment:
None.

Prepared by: _____ **Date:** 8/12/2024
Alexander Showalter, Planner II

Approved by: _____ **Date:** 08/12/2024
Brian Wells, PTNE Division Director

MINUTES OF THE PUBLIC TRANSIT ADVISORY COMMITTEE MEETING

NAPLES, FLORIDA

JUNE 19, 2024

LET IT BE REMEMBERED, the Public Transit Advisory Committee in and for the County of Collier, having conducted business herein, met on this date at 1:00 P.M. in REGULAR SESSION at Collier County Museum Lecture Hall, 3331 Tamiami Trail E, Naples, Florida with the following members present:

Chair:	John DiMarco, III
Vice-Chair:	Peter Berry
	Dewey Enderle
	Sonja Lee Samek
	Benita Staadecker
	Open Seat
	Open Seat

ALSO PRESENT: Brian Wells, Director, Collier County PTNE
Omar DeLeon, Public Transit Manager, Collier County PTNE
Alexander Showalter, Senior Planner, Collier County PTNE
Keyla Castro, Operations Specialist, Collier County PTNE
Elena-Ortiz Rosado, Marketing Manager, Collier County PTNE
Jacob Stauffer, Transit Planner, MV Transportation
Nolan Begley, Fixed Route Manager, MV Transportation

1. **Call to Order**
   Chair DiMarco called the meeting to order at 1:00 P.M.

2. **Roll Call**
   Roll call was taken, and a quorum of four was established.

3. **Approval of Agenda**
   Ms. Staadecker moved to approve the Agenda as amended:
   Add: 5) Committee Action, d. 5307 & 5339 Program of Projects Update.
   Second by Vice Chair Berry. Carried unanimously 4 - 0.

4. **Approval of Minutes**
   Mr. Enderle moved to approve the minutes of the May 15, 2024; Public Transit Advisory Committee meetings as presented. Second by Vice Chair Berry. Carried unanimously 4 - 0.

Ms. Samek joined the meeting at 1:03 P.M. A quorum of five was present.

5. **Committee Action**
   a. **Endorsement of FY24 Annual Progress Report**
   Mr. Showalter presented an Executive Summary "*Fiscal Year 2024 Transit Development Plan (TDP) Annual Update*" for consideration which identifies recommendations and implementation strategies to achieve the goals and objectives of Collier Area Transit.

   He noted:
   - To receive State Block Grant Funds for system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five (5) years and an Annual Progress Report for all other years.
   - The FY2023 TDP report outlines Collier Area Transit's progress made over the past year towards achieving the goals and objectives identified in the last TDP Major Update, approved October 27, 2020, by the BCC and FDOT on December 14, 2020.
   - The TDP Annual Progress report outlines the ten-year planning document that recommends implementation strategies to achieve the goals and objectives and evaluates discrepancies in the implementations that differ with the TDP Major Update.
     Strategic Plan for Mobility
     - Evaluate demographics and travel behavior.
     - Assess existing travel needs.
     - Assess existing transit/mobility services.
     - Conduct Public involvement outreach.
     - Identify mobility gaps.
     - Determine transit/mobility needs and goals.
     - Develop mobility solutions.
     - Develop service implementation and funding programs.

TDP Update

- Past year's accomplishments compared to original TDP steps taken to attain Goals, Objectives and Policies.
- Analysis of any discrepancies between the plan and the implementation for the past year.
- Revisions to the Implementation Program.
- Steps taken to attain Goals, Objective, and Policies.
- Revised Transit Priorities and Financial Plan.

Accomplishments

- Past Year Service Changes – Removal of Last Loops (11,12,13,14.17) and stretching of route times for OTP increase.
- Bust Stop Improvements – 36 ADA improvements, 14 shelter installations and 2 bench installations.
- Projects of Note: Redesigned Paradise Beach Trolley; CAT Operations and Transfer Station and Immokalee Transfer Station.

Steps taken to attain Goals, Objectives, and Policies

- Install a minimum of 10 ADA-compliant, accessible bus stops per year.
- Complete Regional Service and Fares Study.
- Increase Ridership.
- Attend or host a minimum of 6 events.
- News and Media Posts regarding service update.
- Technology Upgrades.
- Maintain Vehicles.
- Annual Grant Applications.

- Funding in the Financial Section of the TDP Annual Progress Report for FY2025-2034 is for planning purposes only.
- The TDP Annual Progress Report includes utilizing the Collier Area Transit Public Participation Plan process endorsement from the Public Transit Advisory Committee and a fifteen-day public comment period.
- The public comment period commenced June 18, 2024, and expires on July 3, 2024.
- Public comments received will be included in the record communicated to the Board of County Commissioners (BCC) for final approval before transmitting to FDOT.
- The proposed final TDP will be presented to the Board of County Commissioners for consideration on July 23, 2024.
- The deadline to submit all TDP updates to the Florida Department of Transportation (FDOT) for approval is September 1, 2024.

The Committee suggested expanding the Public Participation Process venue to enhance social media and include additional news publications.

Recommendation

Vice Chair Berry motioned to approve the Collier Area Transit Fiscal Year 2024 Annual Progress Report to the Transit Development Plan. Second by Ms. Staadecker. Carried unanimously 5 – 0.

b. Membership Application

Mr. Showalter reported there are two seats available on the Public Transit Advisory Committee (PTAC). The terms are for 3-years, and an application was received from Cliff Donenfeld.

Recommendation for Cliff Donenfeld

Chair Di Marco recommended the Board of County Commissioners appoint Cliff Donenfeld to the Public Transit Advisory Committee. Second by Mr. Enderle. Carried unanimously 5 – 0.

The recommendation will be placed on the Board of County Commissioner's *Consent Agenda*.

c. Election of Officers

Mr. Showalter reported in accordance with Ordinance No. 2016-07 the Advisory Committee must elect a Chairperson and Vice Chairperson from among its members annually.

Nomination for Chair

Vice Chair Berry nominated John DiMarco for the position of Chair of the Public Transit Advisory Committee for one year, or until a successor is appointed. Second by Mr. Enderle. Nominations were closed, and no others were tendered. Carried unanimously 5 - 0.

Mr. DiMarco retained the Chair.

Nomination for Vice Chair

Chair DiMarco nominated Peter Berry for the position of Vice Chair of the Public Transit Advisory Committee for one year, or until a successor is appointed. Second by Ms. Staadecker. Nominations were closed, and no others were tendered. Carried unanimously 5 - 0.

Mr. Berry retained Vice Chair.

d. 5307 & 5339 POP Update

Mr. DeLeon presented updates to the "*Endorsement of the Federal Transit Administration (FTA)*" to the PTAC Advisory Committee of the Program of Projects for the Federal Transit Administration (FTA) Sections 5307, and 5339 grant application submittals derived from discussions with FDOT.

Section 5307 FY24

- The Public Transit Neighborhood Enhancement (PTNE) Division receives federal grant funds for the management of the Collier Area Transit (CAT) system annually.
- Collier County is located within the Bonita Springs/Naples Census Urbanized Area.
- A portion of the Section 5307 funding received is shared with Lee County.
- The total amount allocated to the Urbanized Area Formula Program is $6,844,463 of which $5,025,205 was awarded to Collier County, $176,792 to FDOT, and $1,642,466 distributed to Lee County.

- In discussions with FDOT, the FDOT split was revised to $132,084 for CAT and $44,000 to LeeTran.
- Projects proposed for the appropriated funding may include:
    1. Transit Improvement Projects include the rehabilitation of bus stops.
    2. Security and Safety enhancement by replacing Intelligent Transportation Equipment.
    3. Provision of Americans with Disabilities Act (ADA) Paratransit services.
    4. Funding for a replacement bus.
    5. Preventative maintenance.
    6. Fixed Route and Paratransit operational expenses.

Section 5339

- The program provides capital assistance for new and replacement buses, related equipment, and facilities.
- Collier County is the designated recipient for the urbanized area.
- The amount allocated to the Bonita Springs/Naples Urbanized Area for USC Section 5339 Bus and the Bus Facilities Urbanized Area Formula program would be $474,920.
- Project proposed for the funding may include the purchase of a 40-foot bus.

Financial Split Update

An update was provided on the new split of the FDOT allocated funds between CAT and LeeTran.

Recommendation

Vice Chair Berry motioned to endorse the financial split modifications between CAT and LeeTran of FDOT's allocated funds to the Collier Area Transit 5307 & 5309 FY24-25 Program of Projects Federal Grant Funds. Second by Chair DiMarco. Carried unanimously 5 – 0.

Discussions ensued regarding Paratransit service improvements between Collier and Lee Counties.

6. **Reports and Presentations**
   None

7. **Member and Staff Comments**
   None

8. **Public Comments**
   None

9. **Next Meeting Date**

July 17, 2024 - 1:00 P.M.
Collier County Museum Lecture Hall
3331 Tamiami Trail E
Naples, FL. 34104

10. Adjournment

There being no further business for the good of the County, the meeting was adjourned by the chair at 1:34 P.M.

Public Transit Advisory Committee

John DiMarco III, Chair

These minutes approved by the Board/Committee on August 21,2024 as presented X or as amended _____.

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierGov
facebook.com/CollierGov
youtube.com/CollierGov

September 12, 2024

FOR IMMEDIATE RELEASE

Notice of Hybrid Remote Public Meeting
Public Transit Advisory Committee (PTAC)
Collier County, Florida

September 18, 2024
1:00 p.m.

Notice is hereby given that the **Public Transit Advisory Committee (PTAC)** will meet on **Wednesday, September 18,** at **1:00 p.m**. This will be a Hybrid Remote meeting and it will be held at the Collier County Museum, Lecture Hall, 3331 Tamiami Trail East, Naples, Florida. The public may attend either remotely or in person.

Individuals who would like to participate remotely should contact Alexander Showalter at Alexander.Showalter@colliercountyfl.gov or call (239) 252-5849 by **noon on September 17**.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

The agenda will be available on the Collier County Government website at https://www.ridecat.com/inside-cat/ptac/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Alexander Showalter at (239) 252-5849.

Public Transit Advisory Committee
Collier Area Transit
Hybrid Meeting
Collier County Museum Lecture Hall
3331 Tamiami Trail East Naples, Florida
September 18th, 2024
1:00 p.m.

Agenda Packet

1) Call to Order
2) Roll Call
3) Approval of Agenda
4) Approval of Minutes
    a. August 21st Meeting Minutes
5) Committee Action
6) Reports and Presentations
    a. Marco Trolley Update
    b. Major TDP Update
    c. CAT Technology Update
7) Member Comments
8) Public Comments
9) Next Meeting Date – October 16th, 2024, Collier County Museum Lecture Hall
10) Adjournment

Two or more members of the Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future BCC meeting.

Collier Area Transit operates in compliance with Federal Transit Administration, (FTA) program requirements and ensures that transit services are made available and equitably distributed and provides equal access and mobility to any person without regard to race, color, or national origin, disability, gender or age. Title VI of the *Civil Rights Act of 1964*; FTA Circular 4702.1A, "Title VI and Title VI Dependent Guidelines for Federal Transit Administration Recipients.

Anyone who required an auxiliary aid or service for effective communication, or other reasonable accommodations in order to participate in this proceeding, should contact the Collier County Facilities Management Department located at 3335 Tamiami Trail East, Naples, Florida 34112 or 239-252-8380 as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

MINUTES OF THE PUBLIC TRANSIT ADVISORY COMMITTEE MEETING

NAPLES, FLORIDA

AUGUST 21, 2024

LET IT BE REMEMBERED, the Public Transit Advisory Committee in and for the County of Collier, having conducted business herein, met on this date at 1:00 P.M. in REGULAR SESSION at Collier County Museum Lecture Hall, 3331 Tamiami Trail E, Naples, Florida with the following members present:

Chair:	John DiMarco, III
Vice-Chair:	Peter Berry (Virtual)
	Cliff Donenfeld
	Dewey Enderle
	Sonja Lee Samek
	Benita Staadecker
	Open Seat

ALSO PRESENT: Brian Wells, Director, Collier County PTNE
Omar DeLeon, Public Transit Manager, Collier County PTNE (Excused)
Alexander Showalter, Senior Planner, Collier County PTNE (Excused)
Keyla Castro, Operations Specialist, Collier County PTNE
Elena-Ortiz Rosado, Marketing Manager, Collier County PTNE
Liz Soriano, Project Manager, Collier County PTNE
Jacob Stauffer, Transit Planner, MV Transportation
Nolan Begley, Fixed Route Manager, MV Transportation (Virtual)

1. **Call to Order**
   Chair DiMarco called the meeting to order at 1:00 P.M.

2. **Roll Call**
   Roll call was taken, and a quorum of five was established.

   Mr. Enderle motioned to allow Vice Chair Berry to participate in the meeting as a virtual participant due to an extraordinary circumstance. Second by Ms. Samek. Carried unanimously 5 - 0.

Vice Chair Berry joined the meeting. A quorum of six was present.

3. **Approval of Agenda**
   Ms. Staadecker moved to approve the Agenda as presented. Second by Ms. Samek. Carried unanimously 6 - 0.

4. **Approval of Minutes**
   Ms. Samek moved to approve the minutes of the June 19, 2024; Public Transit Advisory Committee meetings as presented. Second by Mr. Enderle. Carried unanimously 6 - 0.

5. **Committee Action**
   a. **None**

6. **Reports and Presentations**
   Mr. Stauffer reported:
   a. **Major Transit Development Plan (TDP) Update**
      Mr. Stauffer reported the TDP process, which identifies recommendations and implementation strategies to achieve the goals and objectives of Collier Area Transit, is a work in progress.
      - To receive State Block Grant Funds for system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five (5) years.
      - The TDP is a ten (10) year plan for transit needs, cost and revenue projections, community transit goals, objectives and policies and serves as an operational guidance document.
      - The major update is developed in coordination with the Metropolitan Planning Organizations (MPO) long range transportation plan.
      - Collier Area Transit staff has been working with the Consulting Team of Stantec and MPO Staff to update the plan.
      - The consultant has produced the Public Involvement Plan, consistent updates to each section of the TDP and identified new peers for comparison of transit systems.
      - The deadline to submit all TDP updates to the Florida Department of Transportation (FDOT) for approval is September 1, 2024.

      If members of the Committee have any comments or questions regarding updates to the CAT Major TDP they should contact Mr. Showalter.

b. Marco Island Trolley Pilot

Mr. Stauffer presented the Executive Summary "*Marco Island Trolley Pilot"* to update the Committee on status of the proposed Marco Island Trolley route.

He noted:

- Collier Area Transit (CAT), in conjunction with the City of Marco Island, is considering the introduction of a trolley route to the island.
- 1 trolley and 1 thirty-foot bus will be utilized for transportation. Each vehicle has a seating capacity of thirty to forty passengers.
- The three-month pilot program, designed to test the viability of a trolley service on the island to reduce traffic congestion, would commence in January 2025.
- The route spans from the Rose Marina on the north side of the island, to Caxambas Park on the south side of the island, travelling along Collier Boulevard. The vehicles would stop at Veterans Community Park and existing beach access points along the way.
- The service, at no cost to the rider, would run from 9 AM to 9 PM.
- Surveys will be conducted to solicit feedback from the users.
- The pilot program is subject to funding by the City of Marco Island.
- A marketing campaign will be initiated at a later date.

c. Facilities Update

Ms. Soriano provided an update to the Committee on facilities projects and enhancements noting:

Collier Area Transit Operations & Maintenance Facility

- The current Radio Road facility, purchased in 2005, has exceeded its useful life.
- In 2020, Collier County received a notice of award from the Federal Transit Administration (FTA) Bus and Bus Facilities Program. Additional funds allocated by the FTA for Emergency Hurricane Relief Funds from Hurricane Irma will be directed to the project.
- The project was released for bid and the Jacobs Engineering Firm was selected to design the facility.
- The Administrative and Maintenance facilities will include operational offices, a drive-through maintenance area for the buses, secure fleet parking, solar panels and air conditioning for the maintenance shop.

CAT Intermodal Transfer Facility - Immokalee

- The bus transfer station will include passenger and transit efficiency enhancements including new bays for the buses to pull off the street; canopy cover for the sheltered transfer of passengers; waiting platform with benches and trash receptacles; vending machines for food or a Food Truck vendor; restroom facilities for passengers and drivers; and ADA improvements.
- The project is under construction and is planned to be completed by late 2024.

7. Member and Staff Comments

Ms. Rosado will email members an invitation to the Marco Island Trolley meeting.

8. Public Comments

None

9. Next Meeting Date

September 18, 2024 - 1:00 P.M.
Collier County Museum Lecture Hall
3331 Tamiami Trail E
Naples, FL. 34104

10. Adjournment
There being no further business for the good of the County, the meeting was adjourned by the chair at 1:34 P.M.

Public Transit Advisory Committee

_____
John DiMarco III, Chair

These minutes approved by the Board/Committee on _____,2024 as presented_____ or as amended _____.

EXECUTIVE SUMMARY
Reports and Presentations
Item 6a
Marco Island Trolley Pilot

Objective:
To update the Committee on the pilot of the Marco Island Trolley route to be introduced to Marco Island.

Considerations:
Collier Area Transit (CAT) along with the City of Marco Island, are looking to introduce a trolley route to the island, with two busses, circulating every day on a roughly 20 minute frequency.

Following conversations with Marco Island Councilman, Rich Blonna, and many representatives of the business community on Marco, CAT is planning to introduce a 3-month pilot to Marco Island. The goal of this pilot is to test the viability of a trolley service on the island to reduce traffic and parking woes that have been cited as an increasing problem throughout the island.

The trolley service is proposed to begin in January 2025, running from 9 AM – 9 PM. The attached route map shows the proposed route spanning from the Rose Marina on the north side of the island, to Caxambas Park at the south side of the island, travelling along Collier Blvd. The route is planned to stop at Veterans Community Park and existing beach access points along Collier Blvd.

The trolley was approved as a part of the City of Marco budget at the 9/09 hearing in Marco Island. Plenty of opposition was in attendance at the meeting but the council members voted 4-3 in favor of keeping the trolley in the budget. We would like to discuss options to further appease the local community and have general discussion regarding the trolley pilot.

Recommendation:
None

Attachment:
Marco Island Trolley Route Map

Prepared by: _____ **Date:** 9/13/24
Alexander Showalter, Planner II

Approved by: _____ **Date:** 09/13/2024
Brian Wells, PTNE Division Director


Collier Blvd
Collier Blvd
Bald Eagle Dr
N Barfield Dr
Marco Island
San Marco Rd
S Heathwood Dr
San Marco Rd
Maximum
30 MPH in
Channel/Slow
Speed or 20...
Winterberry Dr

EXECUTIVE SUMMARY
Reports and Presentations
Item 6b
Update on Transit Development Plan (TDP) Process

Objective:

To provide an update on the Transit Development Plan (TDP) Process.

Considerations:

To receive State Block Grant Funds for transit system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five years. The TDP is a 10-year plan for transit needs, cost and revenue projections, and community transit goals, objectives, and policies. The TDP serves as Collier Area Transit's planning, development, and operational guidance document, and the major update is developed in coordination with the MPO's Long-Range Transportation Plan.

CAT Staff has been working with the Consulting Team of Stantec and MPO Staff to update the plan. The consultant has made steady progress on the update by producing the Public Involvement Plan, consistent updates to each section of the TDP, as well as identifying new peers for comparison of transit systems. CAT and the MPO Staff have been providing comments and feedback on these working documents produced so far and ask the PTAC for any further input.

As MPO and CAT comments have been incorporated into the documents, we would like to provide updates on the progress of the report for discussion and receive any further comments from the committee.

Recommendation:

Review and provide feedback regarding updates to the CAT Major TDP.

Attachments:

1. TDP Stakeholder Interviews Analysis
2. TDP Situational Appraisal – Tech Memo No. 1 Revised
3. TDP Situational Appraisal – Tech Memo No. 2

Prepared by: _____ Date: 9/13/24
Alexander Showalter, Planner II

Approved by: _____ Date: 9/13/2024
Brian Wells, PTNE Division Director

Date: **August 1, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interviews 1:1- Interim Analysis

This an early summary of the stakeholder interviews conducted to date. This information will be updated as the remainder of the interviews are conducted.

Stakeholder interviews will begin with a brief introduction and explanation of the work being done on behalf of the Collier MPO and CAT. Interviewer will provide contact information and explain how the responses will be used in the Transit Development Plan. A summary of the interviews is provided to the stakeholder for review prior to being finalized.

The following stakeholders have been identified for personal interviews.

Policy Makers:

- Commissioner Rick LoCastro, District 1 (August 12, 2024)
- Commissioner Chris Hall, District 2 (declined)
- Commissioner Burt Sanders, Vice Chair, District 3 (July 8, 2024)
- Commissioner Dan Kowal, District 4 (July 2, 2024)
- Commissioners William McDaniel, District 5 (July 10, 2024)
- Council Member Linda Penniman, City of Naples (July 3, 2024)
- Councilman Berne Barton, City of Naples (July 2, 2024)
- Council Member Greg Folley, City of Marco Island (no response)
- Council Member Tony Pernas, Everglades City (August 22, 2024)
- Rich Blonna, Marco Island (July 18, 2024)

Community Partners:

- Top private employers (Arthrex), NCH
- School Board, universities and education centers

Interview Questionnaire

Summary

Introduction. Collier Area Transit is updating its Transit Development Plan. This is a state requirement which requires a review of the transit agency's performance and development of goals and objectives. As a stakeholder and policymaker, your participation is greatly appreciated.

During this initial introduction, all the policymakers interviewed were advised of the TDP process underway and how their responses would be used to develop and support recommendations. All respondents were provided a draft of their interview notes for review and edit.

Below is a summary of the responses.

1. How familiar are you with transit overall?

   This question prompted respondents on their overall familiarity with transit. Overall, most respondents stated they were very familiar with transit and commented on using transit in other places. Two (2) respondents stated they considered themselves less familiar with transit than other areas and one respondent indicated they were somewhat familiar.

   The respondents overwhelmingly indicated they were familiar with transit services.

2. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

   This question asked if there are any identified issues or topics directly associated with CAT that needed to be addressed. Respondents overwhelmingly focused on transit service including addressing paratransit, connectivity with micromobility, reaching underserved areas and providing passenger amenities. Two respondents noted the need for improved communication.

   Respondents overwhelmingly identified issues related to challenges faced by CAT including providing service to underserved areas, operating challenges, along with coordination and commication.

3. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

   Respondents were asked to rate their awareness specifically related to CAT.

   Overall respondents acknowledged they were familiar with various aspects of CAT and transit services provided. Six respondents indicated they had a high level of familiarity with CAT through their roles in government and while serving on the MPO. Two (2) respondents indicated although familiar with CAT, they felt they did not have a significant understanding of CAT operations.

   All policymakers interviewed were familiar with CAT operations.

4. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

   Respondents were asked to identify the primary role of transit in Collier County. The discussion point was meant to captures community fit and identify focus areas.

   All respondents agreed all the identified roles were an important part of CAT's mission. Some respondents went on to clarify, stating connecting the workforce with areas of employment opportunity were particularly important for their economic impact.

   Respondents agreed CAT's role including a variety of services including connecting workers with jobs, serving the transit dependent, and addressing congestion were important.

5. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

   Respondents were asked to identify transit priorities and recommendation they would support.

   Of respondents asked to identify what improvements should be prioritized, five (5) policymakers responded development of new services to underserved areas should be prioritized. This was followed by improving operational efficiency by adding more service hours. Two (2) respondents prioritized regional connectivity and overall improved connectivity between modes.

   Respondents overwhelmingly agreed adding new service to underserved areas was an identified priority.

6. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

   This question asked respondents to identify the primary customer base.

   Most of the respondents agreed all of CATs customers, including transit dependent, businesses, and tourist, should be targeted as primary customers, without prioritizing any one group. Two (2) of the respondents stated transit-dependent persons should be prioritized.

   Respondents agreed all CAT's customers should be treated as primary customers, refusing to prioritize one group over another.

7. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

   This question asked respondents to identify and prioritize funding strategies and user groups which could be called on to finance transit in the future.

   All respondents unanimously responded CAT should diversify its funding base, adding new financing strategies, rather than targeting or relying on any one area. This was the only question for which there was a unanimous answer.

All respondents agreed CAT should diversify its funding base by developing new revenue streams. This included revisiting past decisions on advertising revenue.

8. Would service expansion be considered if a municipality funded it?

   This question looked to explore how policymakers may feel about some municipalities opting in for more services by funding it through CAT.

   A majority of respondents agreed municipalities should be able to pursue funding additional transit service. Respondents cautioned against the unintended consequences of this approach including the challenge of determining cost-sharing, straining the core operations, and creating gaps or disjointed service. Two (2) of the respondents did not feel this was a viable option for every community. All the respondents express support for CAT to explore this funding option further.

   All of the respondents agreed, municipalities should be able to work with CAT to secure additional services. All of the respondents also cautioned, this option should be fully vetted to avoid impacts to the overall system.

9. Can you comment on the outlook for transit?

   This question sought to understand how policy makers felt about the future of transit.

   Three (3) of the respondents stated the outlook for CAT and transit in Collier County was best described as "under pressure." All of the respondents noted a variety of challenges including access to affordable housing, cost containment, and limited resources for needed expansion. Other policy makers characterized the outlook for transit as cautious, continued growth, transitioning, complicated, and promising.

   Policy makers provided an overall positive outlook for transit, tempered by the challenges of limited resources, continued growth in outlying areas, and increasing costs.

   Policy makers also made reference to challenges.

   Policy makers are too focused on cost-cutting and operating efficiency. CAT should be prepared to provide information that supports a careful business plan.

   CAT should continue to develop operational efficiencies that facilitate use of transit by residents and visitors including developing transit hubs, increased use of technology, and improved regional connectivity with Lee County.

   Policy makers recommended improved communication to promote transit as an option.

   Policy makers stressed the need for connectivity between modes, accommodating the use of micromobility including e-bikes, shared use paths, and bicycle and pedestrian walkways as means of supporting transit, its users, and operational efficiency.

Date: **July 8, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview – Collier County Commissioner Burt Saunders (Policy Maker)

Commissioner Burt Saunders was interviewed via telephone on July 8, 2024. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Commissioner Saunders's comments.

Interview Questionnaire

1. How familiar are you with transit overall?

   Commissioner Saunders stated the Board of County Commissioners has had several meetings where CATConnect Paratransit Service was discussed. He noted there had been concerns expressed, especially by persons from blind services who experienced trouble with scheduling and routing. Commissioner Saunders stated staff had acknowledged there were opportunities to improve the delivery of services.

   Regarding Fixed Route services, Commissioner Saunders stated there is likely a need to expand services to meet growing areas of demand and growth. He noted there are people trying to access jobs at hotels and other service jobs that require a long commute. He observed most of those jobs are in areas away from where the workforce resides. He added many of those workers will rely on transit because it is significantly less expensive that driving a vehicle to those jobs.

   Commissioner Sauders referenced FDOT's Commuter Services program as another option for connecting workers with jobs. He stated Commuter Services provides vanpools and carpools which could help meet those demands. He felt this area should be further developed as part of the transit system overall. He added the County could support some of those efforts to address congestion, commuter traffic, and connecting workers with jobs.

2. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

   Commissioner Saunders commented on CAT overall, stating although he was not familiar with the operational aspect of transit, he felt they were operating well. He noted he has received communications from constituents requesting bus shelters at various locations. He expressed concern over the heat and rain which make waiting for transit difficult on riders. Commissioner Sauders added bus shelters were important to CAT operations and more are needed for persons riding transit in Collier.

3. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

   Commissioner Saunders stated he is not particularly familiar with CAT routes in the County. He stated he relies on staff to manage the program and bring forward policy issues. He added he has not ridden transit in Collier but is sufficiently aware of their operations.

4. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

   Commissioner Saunders stated CAT has a responsibility to fulfill all those roles including connecting workers with jobs, providing a service for persons without cars, and to address and reduce congestion. He felt all roles should be part of CAT's mission to address transportation needs in the County and it was not necessary to exclude one over another. He stated not one of those roles was more important than another.

   Commissioner Saunders stated it was important for CAT to provide various services to relieve congestion, especially during commute times.

5. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

   Commissioner Sauders stated he recognized CAT had several priorities. He noted more fixed route service reaching areas of new development, and adding more service during periods of heavy demand were important and should be prioritized. He added, operating efficiently and effectively were also transit priorities that should be tracked.

   He added that there was recognition that Collier County was very spread out and this could be a challenge to provided more fixed route transit service to outlying areas. He felt the demands and challenges of transit need to consider all those priorities.

6. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

   Commissioner Sauders felt all of CAT's customers were important and thought it was not necessary to differentiate between them to provide good services. He stated serving the general public included all of those customers. He noted that the cost of transportation can be very high for some people and should be considered when developing transit services.

   He added the benefits of transit extend beyond just the riders. When more people use public transit, it takes vehicles off the road addressing congestion. He noted when connecting people and jobs, both the employers and employees' benefit.

   Commissioner Saunders commented on FDOT's Commuter Program as a potential solution for addressing some needs at large employers. He felt some employers such as hotels and service

industry jobs require transit outside regular commute times, noting nights and weekends or very early mornings. He noted these could be better served by vanpools or similar service.

Commissioner Saunders indicated there was an opportunity to tailor transit service to a community's needs. He was hopeful this would reduce the cost of transportation for users.

7. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

   Commissioner Saunders did not object to exploring other options for funding transit. He felt there were models around the state that could be explored and studied and developed into options. He stated the State was successfully funding some transit services tied to employers that should be investigated.

8. Would service expansion be considered if a municipality funded it?

   Commissioner Sauders stated that while he did not oppose looking into funding participation agreements, he felt this could impact operations. He noted that if some transit was subsidized it could impact the entire system. He stated transit's mission is to replace vehicles on the road and connecting people with jobs and services with reasonable user fees. He stated funding transit was part of funding local government functions.

9. Can you comment on the outlook for transit?

   Commissioner Sauders commented that the current environment is focused on cost cutting and not sufficiently on operating efficiently. He stated some elected officials may be looking to eliminate programs that are not self-sustaining. He stated he would not be in favor of reducing transit, but the current climate may not be supportive of service expansion and increases.

   He encouraged CAT to align with the business community and their goals.

Date: **July 2, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview Commissioner Dan Kowal (Policy Maker)

Commissioner Kowal was interviewed on July 2, 2024, via Zoom. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Commissioner Kowal's comments.

Interview Questionnaire

1. How familiar are you with transit overall?

   Commissioner Kowal stated he had no real experience using the CAT system in the 20+ years of living in Collier County. He noted however, he was familiar with transit and used it often growing up in Pittsburgh. He stated growing up transit was important to him and very valuable especially when he could not drive. He recalled transit being seamless as he traveled between towns, connecting at hubs. He felt it was convenient and a reliable form of transportation.

   In Collier however, he felt the operating conditions were too varied, noting how big Collier County was and the mix of rural and urban conditions. He stated people are moving out to rural areas of the County where you are completely car dependent. He noted there are significant gaps where transit may not make sense.

   Commissioner Kowal stated there were large swath of populated areas where we need to figure out how to provide resources. He stated CAT needed a targeted plan to get reach people who are very far out, so they do not have to drive everywhere. The County needs to plan for businesses that are relocating to the area to allow them to access more of the workforce. He stated CAT needs to connect centralized service areas and major employers. Commissioner Kowal expressed concern at the number of employers including Arthrex and other new companies that moving to the Ave Maria area with limited transit resources. He stated the economic growth compounded with 2 new towns and 2 more villages with over 9,000 new homes to be built in the area will result in increased demand for all services, including transit. Commissioner Kowal noted this is in addition to the 2 existing industrial parks which continue to grow. He noted, in addition the Great Wolf Lodge, Paradise Sports and a new soccer team franchise, and the numerous new hotels approved and already under construction – all will continue to put pressure on transit to address congestion and connect people, jobs, and places to live.

2. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

   Commissioner Kowal stated he had no general comments. He felt CAT was well managed.

   He noted most recently CATConnect was before the Board. He stated some Lighthouse participants were not happy and had expressed concerns about CATConnect service. He stated some were concerned the routes were inefficient, passing drop off points only to turn around. He stated staff was able to explain the automation that programs trips and address their concerns.

   He added that Lighthouse illustrates the future demand of paratransit services. They have approximately between 200 – 300 participants that require disability services and this continues to grow. He explained this creates a need to add more vehicles into service. Commissioner Kowal stated listening to the Lighthouse, he felt more could be done to help the customers understand trip information. He noted the vehicles already have a great deal of technology and he thought it could be used to provide some (audible or visual) queues for passengers to give them trip information while they are onboard.

3. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

   Commissioner Kowal stated he generally knows where CAT operates, and he sees the CAT vehicles and bus stops. He felt CAT needs to do prepare for the developing transit in high growth areas. He stated the Board recognizes the opportunity transit provides to address growth and supported giving bonus densities for developments near places where transit is.

   He noted on Marco Island, a hotel there had partnered with CAT to accommodate their staff that operated late. He stated this was a good example of an employer working with transit. He wanted to encourage staff to continue to work with employers to connect the workforce with employment opportunities. Commissioner Kowal suggested CAT survey large employers in the area to understand where their workforce is coming from use that data to create transit service that meets their needs.

   Commissioner Kowal noted tourist should also use transit. He stated the bed tax collected by the Tourist Development Council could support the demand created in service industry jobs. He felt the funding of transit should be shared across industries that create some of the demand. He expressed concern that transit funding relies too heavily on ad valorum taxes. Commissioner Kowal stated there is an opportunity with all the new hotels (including boutique hotels), manufacturing, and industry coming to Collier to be creative in funding transit.

   Commissioner Kowal noted that in his law enforcement background, he saw the opportunity to leverage growth to pursue grants. He felt transit could use grants to build relationships with the private sector to fund transit. He added grants could be used strategically to fund early needs and give programs time to fully develop. He stated a business approach to identifying funding opportunities, including grants would be needed to address growth and demand for transit.

4. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

   Commissioner Kowal stated one of transit's primary role should be connecting people with employment opportunities. He added it was important to also provide transit for life sustaining trips and needed community services. He felt this was an important to maintain the quality of life in Collier County.

5. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

   Commissioner Kowal stated those all could be priorities. However, he was aware of the need for shared bike paths, sidewalks, and shared-use paths in areas to the east of the County. He stated there are people living near Naples that bicycle to work. He added, CAT needs to understand where the daily travelers are going and support as much of that as possible. He cautioned against trying to serve all areas in Collier County, especially where there is low ridership. He noted, with limited resources you need to address areas where you can serve the highest number of people and have the greatest impact – connecting people with jobs.

6. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

   Commissioner Kowal stated he recognized there are people in Collier County who depend on public transit for life sustaining trips. He felt this was an important service. He added service industry jobs rely that rely on transit including school workers, restaurant servers, and housekeepers are important people to serve.

7. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

   Commissioner Kowal felt that diversifying how transit is funded was important. He felt connecting the demand, including with large employers, with providing the service needed to be addressed. He stated leveraging grants to offset some initial investment costs was a good business practice. He felt state and federal grants could be leveraged with public-private partnerships if they could be sustained. He felt the continued growth in the County would increase demand for transit, and that needed to be planed for.

8. Would service expansion be considered if a municipality funded it?

   He felt that this warranted more discussion because municipalities represented a relatively small segment within county. He contrasted this with most of the Collier County being unincorporated citing Immokalee as an example. He stated Immokalee would benefit from more transit than most of the incorporated cities. He recognized Immokalee does not have a large tax base that could contribute so he questioned how effective that would be. He thought it should be vetted for future

consideration. He felt addressing how larger businesses that are creating demand for transit could contribute could be a better focus.

9. Can you comment on the outlook for transit?

   Commissioner Kowal felt the outlook for transit included continued growth in the East and Northeast portions of the County. He felt that with this growth, transit should be preparing to address demand with transit hubs. He stated connecting new growth areas with services was important to addressing congestion.

Date: **July 10, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview Collier County Commissioner William McDaniel (Policy Maker)

Commissioner William (Bill) McDaniel was interviewed via telephone on July 10, 2024. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Commissioner McDaniel's comments.

Interview Questionnaire

1. How familiar are you with transit overall?

   Commissioner McDaniel indicated he is not too familiar with CAT operations in any detail. He knows it is an important community service. He noted there has not been a great deal of discussion about transit as in the past.

2. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

   Commissioner McDaniel stated he understood the constraints of transit operating in Collier County. He noted Collier's geography and widely disbursed population areas, lower density were challenges for transit. He compared more densely populated areas such as Miami and other large cities where the intensity of development and congestion make transit more viable.

   Commissioner McDaniel provided an example, noting a resident who needs to take several buses with long connections when traveling in from Immokalee. He felt this use of transit in this case was cumbersome and difficult for people who rely on public transit. He felt there should be better, more efficient options, especially when considering the expense. He added there is a role for transportation companies such as Uber to meet some of those needs more efficiently.

3. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

   Commissioner McDaniel stated CAT had good visibility. He noted, no operation is perfect working 100% of the time. He added they were performing as expected.

   Commissioner McDaniel stated transit met a need for persons who cannot afford a car or cannot drive for a variety of reasons. He noted, especially for persons with limited mobility, the very elderly, and persons with developmental disabilities, transit is providing an important service.

He added overall as Collier County continues experience continued growth; he expects transit to help reduce the strain on roadways and other transportation infrastructure.

4. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

   Commissioner McDaniel felt all the above roles represented important considerations. He felt no one role should be prioritized, rather a rational business approach to meeting needs and demands should be developed and pursued. He noted each role has different needs and resources should be directed in an efficient manner.

5. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

   Commissioner McDaniel noted it was difficult to prioritize one need over another. He stated these likely all represented an area that needed to be considered when budgeting and allocating resources. He noted the operational efficiency of transit including downtime, area covered (land mass), and frequency needs to be discussed.

   He noted this question should consider the importance of regional coordination with Lee County. Speaking to church group in Immokalee, he was made aware of the need for additional connecting service between Lehigh Acres and Immokalee. He stated he would like to see an additional route connecting to Lee County where there is significantly more affordable housing. He added both communities would benefit greatly from more transportation options.

6. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

   Commissioner McDaniel commented, that just like the previous question, CAT needs to consider all customers in the development of its services. He stated while there are no one-size fits all, transit systems should have options and alternatives that serve demand with the appropriate size vehicle, service, and resources.

   Commissioner McDaniel added the state has several programs including vanpools that he felt reflected the need for different options. He stated vanpools worked directly with employers to address their needs and their workforce. He noted this is an example where the service and vehicle met the need of the customer. He commented both the rider and the employer benefited from the service.

7. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

   Commissioner McDaniel stated there was no “best” way to pay for transit. He felt transit was increasingly an expensive service that competed for other county needs. He recognized that user fees needed to be a part of providing service.

Commissioner McDaniel recognized there was an economic balance to be maintained. Transit services should be priced to encourage the use of public transit, making it more desirable than driving a single occupancy vehicle that adds to congestions, traffic, and pollution.

He added there was a financial benefit to transit relieving the demand and congestion on roads and potentially delaying costly investments in the construction of more transportation infrastructure.

Commissioner McDaniel stated there should be more discussion on transit financing, options, and the use of incentives to drive ridership. He added he would like to a more discussion surrounding equitable user fees rather than just a flat fee regardless of cost. He noted there did not appear to be any discussion regarding incentives. He stated he would not support a mandate that asked municipalities to contribute to transit funding.

8. Would service expansion be considered if a municipality funded it?

Commissioner McDaniel responded he could envision where a municipality may have a specialized need that they would want to fund. He mentioned how Marco Island as a barrier island could have a need related to the service industry jobs located there and the need to bring workers onto the island. He stressed this would have to be studied and a strong business case presented for it have support.

9. Can you comment on the outlook for transit?

Commission McDaniel felt the outlook for transit will focus on transitioning. He felt with the increasing use of artificial intelligence (AI) and connected and automated vehicles (AV), significant changes can be expected. He noted public transit needs to be on the forefront of technology to help build a more responsive and efficient system. He noted there had been some discussion regarding technology and the scheduling software, but he felt it was still developing.

Commissioner McDaniel expressed concern over the cost and expense of providing transit service. He felt there was insufficient information presented for policymakers to consider. He noted other areas discussion cost-benefit ratios that help to justify continued investments and expansion of services. He did not feel he had that information when discussing transit services.

He acknowledged, providing transit in Collier County was challenging with a population distribution that was cumbersome due to the layout of the county. He noted there weren't concentrated areas of high density that needed to be served by transit. Rather, he commented, Collier's population and even growth patterns appear to be disbursed throughout the County.

Commissioner McDaniel expressed frustration at how some studies were presented to the Board of County Commissioners. He referred to a regional fare study that did not concern operational perspective of charging fares. Rather, the study focused on rider sentiment which was biased.

He added, the Board has not seen a study where the cost benefit analysis for transit has been presented. He felt the Board needed to fully understand how the investments in transit were balanced against the services provided in a variety of areas. He noted there were some intrinsic fixed costs which should be balanced against benefits such as reducing congestion and pollution. He stated he has never seen an analysis of that kind.

Commissioner McDaniel added, the idea of employer contributions may be neutral. He noted employers can subsidize transit, but they will equally pay higher wages to attract talent. He stated businesses see this as a cost of doing business in place like Collier County.

Commissioner McDaniel gave an example, noting he did not know what the annual ridership of CAT was. He felt this information provided important context in decision making. He felt business metrics such as the rate of return on transit investments should be part of any recommendation. He felt discussions regarding route changes and timing needed to be considered as business decisions. He noted he could not recall ever having those discussions, adding as technology helps with operational efficiency, there was an opportunity to measure productivity and see improvements.

Overall, Commissioner McDaniel stated he was neither optimistic nor pessimistic about the future of transit. Rather, he stated he wanted to see more information with a stronger business model for evaluating performance.

Date: **July 3, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview Council Member Linda Penniman, City of Naples (Policy Maker)

Council Member Linda Penniman was interviewed via telephone on July 3, 2024. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Council Member Penniman's comments.

Interview Questionnaire

1. How familiar are you with transit overall?

   Council Member Penniman started the interview commenting on the evolving role of e-bikes. She wanted to stress that a discussion on e-bikes and their role within the transportation network and particularly within transit should be further explored. She noted that FDOT has a white paper on e-bikes and this information should be shared and discussed at the Collier MPO. She added that e-bikes can be a transportation alternative allowing the workforce to access more jobs, create more flexibility, and connect more people with jobs. She felt there had not been sufficient information and discussion on their emerging role.

   Council Member Penniman stated her familiarity with CAT primarily came from her role at the MPO. She felt there had been a great deal of discussion on serving people with handicaps, limited mobility and with no other transportation options. She was somewhat familiar with CAT operations as a whole and she has observed CAT buses in circulation throughout the County. She stated she was familiar with transit, having grown up in an area with public transportation.

2. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

   Council Member Penniman stated she would like to see e-bikes further vetted and additional information should be provided to policymakers and other decisionmakers. She noted that e-bikes were growing in popularity and provide another transportation option. She added they allow users to travel farther and provide more flexibility and reliability that traditional fixed-route transit that operates on a schedule. She felt it was an excellent option for individual mobility.

   Council Member Penniman commented the role of private transportation providers that are providing on-demand services. She felt there was a role for these private providers to supplement

transit service in some areas. She stated these options should be explored and discussed as part of developing plans for transit.

Council Member Penniman stated overall her impression of transit services was heavy influenced by her use of transit growing up. She stated many people who come from areas with robust transit systems and may have a bias when discussing transit in Collier. She stated places with robust transit evolved over many years with concentrated areas of populations to serve. She noted these conditions are very different from transit in the City of Naples and Collier County.

3. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

   Council Member Penniman stated she is aware of CAT operations. Through her work on the MPO she was part of some discussions regarding transit and paratransit services. She noted that the MPO has been diligent in including transit in discussions and plans as part of a multimodal approach. She commented her work on the MPO was very important and had been reappointed. She felt being part of discussions at the MPO was important to the coordination between the city, the County and the MPO.

4. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

   Council Member Penniman stated CAT role must include getting people to work every day. She felt connecting people and jobs was critical to CAT's role in the County, as well as to the businesses that need workers.

   She commented on her experience working in Immokalee. She noted that people in Immokalee are solving the transportation gap by organizing their own carpools and vanpools. She stated that this has become part of the culture where transportation options are very limited. She felt there should be a way to support these areas with dependable, safe, public transportation. She recognized this would be a significant challenge for CAT, noting the long travel distances, the hours of operations, and other constraints.

   She stated providing public transit has its challenges everywhere, not just in Collier. She noted in places where it snows, people wait for buses in very cold conditions. Effective transit must account for all these operating conditions and still be extremely punctual for people to use it and rely on it.

   Council Member Penniman expressed a desire to see the appropriate size vehicle in operation. She felt the larger buses were not appropriate for circulating on every route. She noted having appropriate size vehicles, vans, and other smaller vehicles could be shown to be more operationally effective. She was also concerned how empty buses may be perceived as an inefficient use of transit resources.

5. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

Council Member Penniman stated transit must be operationally efficient. It must be flexible, responsive, and light. She felt there should be a reasonable business approach to meeting demand. She added transit was an integral part of the whole transportation network in Collier County, adding CAT should foster confidence in the system.

In discussing the financing of transit, Council Member Penniman stated this is an area that needs to further be discussed. She noted that for a rider, a dollar may represent a significant amount of their budget or cost of getting to work. She felt transit has a role in facilitating access to jobs but there is also an opportunity to work with employers who are benefiting from the workforce to connect people and jobs.

Council Member Penniman stated CAT needs to study how transit is monetized in other places.

She noted the City of Naples has very limited land which is very expensive. She added it also has an ongoing demand for service workers and there are good paying jobs in Naples. She noted the high cost of living within the city means workforce and affordable housing are not located nearby. She stated this also applies to other areas of Collier County with over 54,000 vehicles traveling into Collier County on I-75 from Lee County almost daily. She felt there needed to be more coordination with Lee County policymakers.

Council Member Penniman stated there was nexus between available work, affordable/workforce housing, and areas where new jobs are coming. She added that nexus should be studied and addressed in upcoming plans. She felt supporting economic development, job creation, and transportation connections was important to the area.

Council Member Penniman stated CAT needs to identify opportunities and develop plans to capitalize on them. She noted she was part of a discussion at the MPO regarding the use of railroad tracks near Goodlett-Frank Road which could be used to connect trails with roads and transit to improve traffic circulation. She felt the use of e-bikes made this even more viable.

She added, when people are driving, they must focus on operating the vehicle. When people are riding in transit, either on a bus or rail, there is an opportunity to do other things and use that time productively. They can make calls, read, or do other things while someone else drives. She noted the time in a car is wasted.

6. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

   Council Member Penniman felt connecting people and work is critical to transit service in Collier. This should be a focus for CAT.

7. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

   Council Member Penniman stated CAT needs to better monetized the transit system. She suggested transit approach the Chamber of Commerce and bring them into the discussion. Their

role in the business community will be helpful in connecting economic development activities with transit services that will support them.

She felt that employers like Arthrex are forward thinking and will support transit as part of their business model. She felt employers could support transit as an option.

Council Member Penniman stated she would like to see more information and discussion surrounding the penny-sales tax. She felt it was important to understand how much community support there was for transportation initiatives funded by the penny sales tax. She felt transit could be better supported by these initiatives. She felt people would be supportive of efforts that connect people with jobs and that included supporting transit.

She added, bringing the business community into the finance discussion would be helpful and important to getting them to participate in transit as a solution. She noted, transit cannot be funded by transit users who have limited transportation options and limited financial resources.

Council Member Penniman stated, ideally transit would be readily accessible and connect major activity centers. She added, providing transportation options for people who simply did not want to drive was an important goal. She felt older populations would benefit if there was a transportation option such as transit that meant they did not have to drive everywhere.

8. Would service expansion be considered if a municipality funded it?

Council Member Penniman did not see a problem with municipalities funding transit within their areas. She felt every community has to make decisions that address their constituents needs and concerns. She did note, there needed to be further discussion before CAT elects to pursue this and examine how the service would connect through the County. She felt there needs to be transparency in who is paying for the additional services and how that would work within the transit system.

She stated financing transit is important and should be carefully planned out and defensible. She felt the penny sales tax needs to be discussed as an option for transit.

9. Can you comment on the outlook for transit?

Council Member commented the outlook for transit, stating it was very complex. She noted she was reading “The Great Displacement: Climate Change and the Next American Migration” by Jake Bittle and considering the implication for Naples, Collier County and Southwest Florida. She felt while some growth will continue, but there is a movement of people who are relocating due to storms, the high cost of living, and other factors. She felt this trend should be discussed. She stated the community needed to be prepared for emerging trends.

She felt the need for affordable workforce housing was an important consideration for Collier overall impacting several areas. She added this included transportation and especially CAT as they work to support connecting people and jobs.

She noted she would like to see more cooperation and collaboration between Lee and Collier Counties. She expressed concern at the amount of people commuting into Collier because of

where affordable housing is located. She stated the coordination between Lee and Collier needed to focus on transportation impacts, facilitating connecting jobs and workforce housing as well as the congestion, traffic, and safety in the transportation network including I-75.

She stated she would like to see FDOT's white paper on e-bikes as she sees this as a continuing trend.

She concluded. there is a place for transit in Collier County as part of its transportation network that supports growth economic activity, building and construction. She felt there needs to be continued discussion on how CAT will connect with employment centers. She hoped that the issues she raised would be further discussed and fully vetted.

Date: **July 2, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview Councilman Berne Barton, City of Naples (Policy Maker)

Councilman Barton was interviewed on July 2, 2024, in person at his offices in Naples, Florida. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Councilman Barton's comments.

Interview Questionnaire

1. How familiar are you with transit overall?

2. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

   Councilman Barton did not have any specific discussion points to raise. He stated his constituents had not raised any concerns regarding CAT service. He was confident if his constituents had experienced any problems with CAT service, they would have made them known to the city.

3. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

   Overall, he felt CAT was an effective operation. He noted CAT operates within the city with no bus pull offs, but they manage not to significantly impede the flow of traffic, limiting how long they stay pulled over and holding traffic. He stated he see the CAT vehicles in operation and feels there is an appropriate level of service within the city.

4. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

   Councilman Barton noted he had limited personal experience with CAT, but overall, felt CAT provided a valuable service. He indicated connecting workers who live outside the area with jobs

within the City of Naples was an important objective for CAT. He added CAT provides options for a variety of Collier County residents and having alternatives/options is important.

5. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

   Councilman Barton stated he had limited information with which to make a recommendation but felt the CAT service area was very large and growing. He noted the County was expanding considerably with growth in the North and Northeast corridors, citing Ave Maria as an example. He felt there was continued growth already approved in these areas, with more expected to come. He noted connecting the workforce that may reside further away from jobs will become increasingly important, especially given the cost of housing within the City of Naples.

   Councilman Barton noted there could be some interest in premium services. He stated for example providing express service to the airport (RSW) and other major destinations could serve tourists and visitors. He felt CAT adequately evaluated service needs.

6. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

   Councilman Barton stated Collier County is experiencing a major affordable housing challenge. He stated trend continues to move the workforce away from jobs in the city and the County as a whole. He stated the City of Naples' economic needs surround the tourism industry and in the service industry sectors. He added filling these jobs creates traffic and congestion which could be helped with efficient transit service. He felt that the workforce continues to move further away from jobs in Collier County.

   He stated although service workers primarily use transit, he felt there was an opportunity to provide transit service that appealed to tourists and visitors.

7. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

   Councilman Barton expressed the responsibility to be a good steward of taxpayer's money. He expressed an interest in seeing some of the industries prospering from tourism contribute in some way to supporting transit. He stated part of the solution of funding transit should include those benefiting from the economic activity in Collier including tourism, lodging, airlines, and developers. He noted this should include efforts to provide affordable housing for workers.

8. Would service expansion be considered if a municipality funded it?

   Councilman Barton felt municipalities could participate in the funding, noting those are discussions for those policymakers. He did not think this would apply to the City of Naples due to the relatively small size of the city.

9. Can you comment on the outlook for transit?

Councilman Barton felt the outlook for transit needed to consider the rapid growth in the County and the traffic congestion as a top issue. He stated a robust transit system was needed to alleviate commuter traffic, traffic congestion, and to help take vehicles off the road. He felt visitors and tourism to be part of the community and should be considered in any future plans.

He noted that preserving the City of Naples and Collier County's unique qualities including its pristine environment was critical to its continued success and economic competitiveness.

Councilman Barton was positive about embracing technology in general but wanted to see CAT take a business approach to its implementation and use. He stated the adoption of technology, including adoption of electrical vehicles should be fully vetted. The technology should be proven with documented results before CAT makes significant investments.

He added that maintaining a livable community and preserving Collier County's resources were important to its economic property and maintaining the current standard of living. He added it is the reason people continue to move here and we all have a responsibility to continue to safeguard resources, maintain a high standard of living, and make wise investment decisions.

Document: Stakeholder Interview Councilman Rich Blonna, City of Marco Island (Policy Maker)

Councilman Rich Blonna was interviewed via telephone on July 18, 2024. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Councilman Blonna's comments.

Interview Questionnaire

1. How familiar are you with transit overall?

   Councilman Blonna stated he has been working closely with CAT to bring enhanced transit service to Marco Island during the winter tourist season. He stated he has been looking at the feasibility of trolley service with a loop route to service the most heavily visited areas on Marco Island. He added this work had led to a better understanding of the constraints and challenges of providing transit.

   He noted there are significant challenges to cost sharing and operations which have made it difficult.

   Overall, he noted while his interactions with CAT have been focused on the trolley service he has a high-level understanding of transit operations in Collier County. He noted he is also involved with Conservation Collier and as a liaison to various committees which keep him very busy.

   He added he had recently become aware of the Public Transit Advisory Committee (PTAC).

2. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

   Councilman Blonna stated his work trying to implement transit on Marco Island is a clear example of how transit solutions are difficult to implement. He stated public funding, and the state and federal grant restrictions offer little opportunity to tailor services to a community's needs, be creative, or partner to fund transit solutions.

   Councilman Blonna stated he would like to address the congestion and safety concerns during the peak winter season. He noted 2 trolleys in operation in a loop configuration could allow visitors on Marco Island to travel between the most frequented areas along 4 connected roadways. Ideally visitors could come on to the island and park their car and not move it until they left. He added or better yet, they could take a taxi or Uber and not bring any more cars onto the island.

   Initially, he proposed a shared funding model where the business community through advertising revenue could be used along with fares and a discounted rate from CAT to fund a pilot. He stated after speaking with CAT, it was obvious the bureaucracy is inflexible. He added, Marco Island cannot create a separate pool of resources specific to its needs. It is all part of the larger county-wide system.

   Councilman Blonna noted CAT staff had been very helpful and he appreciated working closely with them. He stated CAT staff is bound by bureaucracy and the service request for Marco Island is an outlier, making the service a challenge to implement. He noted this was in addition to some

hesitancy with the City Council. He stated there was a clear contrast between public and private initiatives. He added, he was confident the pilot project would work.

Councilman Blonna explained he is a supporter of transit solutions and visited Anna Maria Island to observe the trolley system there. He said it was a great experience and helped him develop some of his approach. He stated they arrived at Anna Maria, stayed in a beach front cottage and took the trolley everywhere without ever moving his car. He added he is still researching how the service was started by Manatee County and then transferred to their Chamber of Commerce. Councilman Blonna said he is interested in learning more, especially the lessons learned from implementing the service.

He concluded, noting there is potential to connect other parts of the county. He pointed to Donna Fiala Eagle Lakes Community Park and the opportunity to connect with bicycle paths. He expressed support for transit connections with bicycles, putting bicycle racks on buses. He stated connecting these modes was important.

3. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

   Councilman Blonna expressed he had a high level of awareness of CAT. He noted he took participated in a free ride day and rode Route 21 to Marco Island. He felt it was important to experience the service firsthand. He stated that riding transit provided a beautiful perspective where you can see over cars into the distance and see the natural areas. It provided a wider view of the natural resources surrounding the area.

   He added, there are some misconceptions about who is riding transit and the fear of overcrowding. He stated the positive impact of transit, reducing the number of cars on the roadway, eliminating the need to find parking at popular destinations, and the comfort and ease of riding transit are consistently understated. He stated, there is also an important opportunity for people coming to work in Marco Island. He added, employers and the workforce, visitors and residents can all benefit from transit service on Marco Island.

4. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

   Councilman Blonna responded transit can have a role in all the options presented with the proposed trolley service. He stated he is focused on Marco Island, but this pilot provides an example of how transit can meet community needs.

   He stated Marco Island and the trolley pilot could operate over just a few blocks in a loop, connecting riders with shopping, dining, and even City Hall.

   Councilman Blonna commented on the area's demographics which show an aging population which will become depend on transit. He noted right now, this demographic may be hesitant about implementing transit solutions, but trends support developing transit. He added, Marco Island is attracting younger residents and more cosmopolitan people who travel and are familiar with transit, including international visitors. He stated even work patterns are changing, where some workers can choose to work from home and given an option may not want to drive. He added

multiuse development is also changing how much people depend on cars. Councilman Blonna stated he understood transit was not the solution for everything, but he added it needed to be part of the mix of solutions.

He added Marco Island needs to develop different transportation options.

5. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

   Councilman Blonna agreed all the options listed where areas where CAT needed to develop. He stated mobility on demand was not popular on Marco Island and he stated it may have limited application.

   He stated the hotels and condo would likely not use the traditional fixed route bus service or the larger buses, but they would support branded, smaller vehicles that reflected the local character.

   Councilman Blonna stated temporary service, which is aimed at tourists and temporary, such as during the winter season, would make sense and help with congestion.

   Councilman Blonna was confident the beach trolley will be well supported once it is implemented which is why a pilot project is so important. It will demonstrate how transit can relieve congestion, demand for limited parking, and allow people to get around Marco Island without a vehicle.

6. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

   Councilman Blonna agreed all the customers mentioned should be fully explored.

   He stated visitors have needs very different from the workforce that may be accessing jobs on the island. Marco Island is removed and difficult to access. He noted workforce traveling in from Golden Gate, Immokalee, and other outlying areas can find Marco Island too far. He added professional staff, government workers, fire, and police – he did not see them using public transit based on their profession.

   Councilman Blonna was confident CAT was looking at all their customers and trying to make sure to connect the service with the riders. He noted, this was not always possible.

7. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

   Councilman Blonna stated the finance side of transit was complicated. He felt that advertising revenue could be increased to reflect market rates. He noted the current rates are substantially lower than they should be. He added fares appeared to be flat across the board, rather than reflecting the service. He stated this was an area that could also be updated to better reflect a market approach. Councilman Blonna suggested improved business relationships with government agencies, businesses, and other groups could help to underwrite some of the costs.

Councilman Blonna stated Marco Island has lowered taxes the past few years resulting in less funding for projects such as the trolley. He stated he would continue to advocate for transit on Marco Island during season.

8. Would service expansion be considered if a municipality funded it?

   Councilman Blonna stated Marco Island would likely not fund service expansion without some incentive. He stated there was an opportunity to engage the business community. And while he did not think the business community would agree to outright fund transit service, he felt if they could underwrite the cost through advertising.

   He noted sharing costs brings stakeholders together.

9. Can you comment on the outlook for transit?

   Councilman Blonna stated the outlook for transit is greatly dependent on who is moving along the 951-Corridor. He felt the growth in the eastern part of Collier County will continue to drive growth and that growth will look for alternatives to just driving.

   He added the lack of parking will also impact how people visit and frequent popular destinations. If people find it too difficult to park and there is no transit option, they are likely to go elsewhere.

   Councilman Blonna was confident newer residents to Collier County will have an impact on the demand for transit. He stated people will want options to driving and the added benefits of reduced congestion, impacts to the environment, and time savings will make transit more desirable. He stated this would be bolstered by new residents who come from places with lots of transit. He stated as long as the transit service matches the demand and character of the location, he was positive on the outlook for transit.

Date: **August 12, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview Collier County Commissioner Rick LoCastro (Policy Maker)

Commissioner Rick LoCastro was interviewed in person on August 12, 2024. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Commissioner LoCastro's comments.

Interview Questionnaire

1. How familiar are you with transit overall?

   Commissioner LoCastro stated he was very familiar with transit operations. He previously served as a Senior Commander over several military bases that included transportation services. From that perspective he understood not only logistics and operations, but ongoing maintenance, service and budgetary needs. From the Collier side, when he first became a commissioner, he toured the transit facility on Radio Road to become familiar with county operations. Since then, he has been out to see new vehicles when invited. He noted the Radio Road facility is in his district. He stated he has been following several board items that focused on CAT operations.

   He added, transit is an expensive service provided by the County and it often competes with other needs. He stated there is always careful consideration given to transit requests because the Board needs to balance the expenditure with the benefit provided. He referenced connecting people with work and reducing congestion, safety, and increased access.

2. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

   Commissioner LoCastro stated he was aware of some of the amazing programs CAT has managed although he felt they were not well known or publicized. He recalled a time when CAT hosted a meeting at the JW Marriott to talk to the business community about some of the different services CAT provided. He stated it was important to communicate with the business community and other customers about what services CAT can offer. He added it was also important for CAT to understand the business community's needs, referencing hours of operation as an example. He recalled one business owner stated how bus service hours did not match up with his staffing needs. CAT had responded they could look at making adjustments to the schedule to meet that business owner needs. He stated this was an example of how communication with customers was important and something CAT should be doing regularly.

   Commissioner LoCastro noted he has good communication with Trinity Scott, especially related to constituent concerns and complaints.

   He felt often the complaints brought to the Board dealt with miscommunication, or the customer was not fully informed about situations. He recalled one complaint where a constituent complained about being told a program was being closed on the day of, with no notice. Commissioner LoCastro recognized CAT cannot do or be everything for everyone, but they must communicate clearly with their customers, especially those that depend on the services they provide. He stated there is a clear expectation changes in programs that affect customers, especially terminating programs must be brought to the Board's attention. Commissioner LoCastro stated ending programs are policy decisions and the Board must consider not just cost-effectiveness but the impact to the community.

Commissioner LoCastro stated he hoped that the bus drivers understand how important their communication with the customer is. He often hears during constituent complaints how riders get information from bus drivers. He wants bus drivers to understand they represent all of Collier County when they are talking to customers and it's not ok to blame anyone for difficult decisions that need to be made. He stated while it may be easy to agree with a customer when they say things are terrible or being negative, he wanted to remind drivers that agreeing with negative comments creates negative sentiments. Customers should be given the opportunity to offer feedback instead.

3. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

   Commissioner LoCastro stated he is aware of CAT and transit operations generally. He understands the constraints and the balance of capital needs and the accompanying maintenance costs associated with heavy duty vehicles and logistics.

   He has been following the transit discussion in Marco Island and their attempts to address congestion on the island with a trolley circulator. He stated he was disappointed he could not dispel wrong information regarding implementing a transit circulator on Marco Island. He stated the misinformation about how the trolley would operate was difficult to dispel. Ultimately, he noted these were community decisions and those resources could be used elsewhere.

   He expressed concern over the use and location of bus shelters. He stated there were areas that were in need of bus shelters. Some areas had lots of riders who often stood in the rain with no shelter. Commissioner LoCastro stated he wanted to make sure those areas were identified and prioritized for a shelter. He suggested CAT should look at relocating low-use shelters to those areas of high need. He recognized the cost of shelters had continued to increase and was hopeful CAT was looking at repurposing, recycling, and looking for any means of mitigating those costs. He cautioned; he was not sure how reasonable it was to move shelters but was hopeful CAT would look into it.

4. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

   Commissioner LoCastro stated all of those are the role of transit. He recognized there is a balance between need and what can be accomplished. He stated CAT needs to carefully assess how effective service is and make those recommendations.

   He noted, the Board was supportive of transit overall and was prepared to allocate additional resources to CAT if there was proper justification and it was reasonable request. He noted, CAT cannot operate in a vacuum and the County has a great deal of needs. CAT needs to bring data and information to the Board that demonstrates they are being efficient with resources and leveraging other benefits in the community.

   Commissioner LoCastro stated he expected CAT to be proactive and gave referenced new developments. He stated there was an opportunity to anticipate demand with new housing developments and work with other County staff to identify new potential riders. He noted CAT staff should be prepared to work with new developments to potentially connect them with transit.

5. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

   Commissioner LoCastro started by stating CAT cannot meet every transportation need in Collier County. He stated CAT cannot be expected to be UBER to everyone. He added CAT must prioritize its services by matching service to need. The County is looking at being more efficient and possibly relocating resources across departments. He stated CAT could use additional resources.

6. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

   Commissioner LoCastro stated CAT should have a variety of customers and a primary customer did not seem to align with their service goals. He stated CAT should analyze utilization and make decisions based on how effectively they can meet those needs.

7. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

   Commissioner LoCastro stated a strong operation looks at all available resources and opportunities. He added this includes revisiting prior decisions. He stated just because a previous Board rejected some strategy, which did not mean that conditions may have changed sufficiently that the Board could reconsider. He used the example of advertising. He knows some bus wraps and outdoor advertising had been rejected but he felt there needed to be a closer look at interior bus advertising. He referenced the model of Disney World. He stated Disney buses are all wrapped and communicate a sense of place, but the interior of the buses advertise restaurants, shows, and other attractions.

   Commissioner LoCastro stated the Board has limited ways to address needs. The Board can reallocate resources from other programs or try to raise taxes. He noted both solutions can hurt people and create gaps. This is why he hoped CAT was looking at alternatives and innovative ways of increasing revenue.

   Commissioner LoCastro expressed concern about raising user fees. He cautioned about raising fees to the point where it did not make sense for people to take transit. He added CAT wants to increase ridership and there should be care consideration of the impacts before raising fees.

8. Would service expansion be considered if a municipality funded it?

   Commissioner LoCastro stated yes, if a municipality would like additional services and was willing to pay for it, it made sense for CAT to provide that service. There were efficiencies that could be captured by CAT providing and connecting transit services.

   Commissioner LoCastro referenced the Marco Island trolley. He felt communication needed to be strengthened. He referenced the fear that transit would be bringing more congestion onto Marco Island was raised by citizens.

He felt the benefits of reducing congestion, minimizing traffic crashes, and making visiting Marco more pleasant were not well communicated. He felt there was a similar discussion now.

Commissioner LoCastro noted he had attended a conference at the JW Marriot with the previous director. He stated several businesses, including hotels participated. One business spoke to the use of vanpools and how that was not really promoted. He hoped that these transit services that offer a variety of solutions be more visible and promoted as alternatives.

9. Can you comment on the outlook for transit?

Commissioner LoCastro stated the outlook on transit depended on how effective transit is. He noted transit operations will continue to cost more with increases in fuel, continual operating expenses from wear and tear on vehicles, and the demand for expanding services. CAT will need to demonstrate they are spending money wisely. He recognized adding capital equipment such as a bus comes with paying for fuel, a driver, and maintenance. He added this is often not recognized when a new vehicle is acquired. He noted transit vehicles in particular need ongoing maintenance due to the heavy utilization, stop and go driving, and the miles they drive. Commissioner LoCastro wanted to make sure resources and vehicles are allocated and deployed correctly. Transit needs to demonstrate real efficiency.

He noted public perception of empty vehicles and making sure the correct vehicle is in operation on routes was discussed. He hoped CAT was communicating with its ridership and the community to demonstrate how they are meeting needs. He added this included where shelters are placed.

Commissioner LoCastro noted his concern with the reliance on grants. He stated one-time grants cannot be relied upon as they represent a one-time injection of cash and often do not cover ongoing maintenance costs. He felt these could be problematic for determining costs needed to operate the vehicle. He noted transit is an expensive service to provide and there is every indication to support that it will continue to escalate in costs.

Date: **August 22, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: Stakeholder Interview Council Member Tony Pernas, City of Everglades (Policy Maker)

Council Member Tony Pernas was interviewed via telephone on August 22, 2024. The interview began with a brief introduction of the Transit Development Plan and the CAT organization. This memo represents a summary of Council Member Penniman's comments.

Interview Questionnaire

1. How familiar are you with transit overall?

   Councilman Pernas stated that serving on the City Council and the Collier MPO has given him the opportunity to become familiar with the challenges and opportunities of transit. He said there is no public transportation in Everglades City, and for smaller communities that is a significant concern.

   He noted, for example, that Everglades City has a population of only 352 people. However, during the winter tourist season, the population in Everglades City jumps to over 1,500. He said most of the properties are second homes, with tourism playing a vital economic role. He added that Everglades City has restaurants, museums, historic properties, and a significant ecotourism industry. He stated that Everglades City is the gateway to Everglades National Park and as a result the city has around a million visitors annually.

   He added that the challenge is Everglades City is far removed, and the only transportation is by individual car. The nearest grocery store is over 35 miles away, and access to services, jobs, healthcare, and shopping requires quite a bit of travel. He stated he understood that there is challenges to providing transit service to small communities in outlying areas.

   He added that there is still a need in his community to provide some type of service, even if it is just a connection to life-sustaining shopping or services several times a week.

2. Do you have any specific discussion points about transit in Collier Area Transit you would like to raise.

   Councilman Pernas stated that even small towns should have some transit. For persons with no vehicles, who can't drive, or are too elderly, they should have some way of accessing jobs, medical services, and doctor appointments, food, and other areas. He added he did not think regular bus service would work in these outlying areas the same as in more populated areas, nor would he expect significant transit services.

He stated Everglades City is at a disadvantage when accessing jobs and other resources without some type of public transportation in place.

3. How would you rate your awareness of CAT, are you familiar with how to use transit or where it operates?

   Councilman Pernas stated that before serving on the MPO, he had limited understanding of CAT. He noted that since serving on the MPO and chairing the Local Coordinating Board, he has gained a better understanding of CAT and its operations.

   He added there is limited information, however, for the general public. He noted that CAT did not have a significant public profile on social media and did not openly advertise their services (routes, schedules) in local newspapers etc. He stated regular users and transit riders may have a better understanding of transit because they communicate directly with drivers and interact with the system. He added that unless you actively seek out information about changes or services provided, you are not likely to know about them.

   Councilman Pernas stated CAT services should be promoted.

4. What do you view as the role of transit in Collier? Connect workers with jobs? Primarily for persons without cars? Relief for limited parking, roadway congestion?

   Councilman Pernas stated that all of the roles mentioned are essential to public transit. He stated connecting workers with jobs is essential to economic growth.

   He noted the list should have also included supporting tourism. He added that if public transit were available visitors can use public transportation to visit Everglades National Park, Everglades City and, Big Cypress National Preserve. He noted public transit has an opportunity to increase visitation and reduce the problems associated with parking access. He added, public transportation can also be utilized for beach access. Tourists do not want to fight traffic on the beach and pay for parking. It would be much better for visitors, businesses, and our facilities if transit just picked people up from their hotels and took them to the places they wanted to visit.

   Councilman Pernas noted congestion could also be alleviated by transit, especially where the jobs are not close to where people are living.

5. What would you consider transit priorities? Increase areas served? Increasing service frequency, adding bus shelters, introducing mobility-on-demand, connecting service with sidewalks, bicycles, and multi-use paths?

   Councilman Pernas noted those were all important priorities for CAT, and he understood those were options for improving service.

   He stated that from his perspective in Everglades City, CAT needed to prioritize underserved areas. He noted that although Immokalee is also far out, but at least they have some service. Residents of

Everglades City, Chokoloskee, Copeland, Jerome and Plantation Island have no transit services, and are at a disadvantage.

Councilman Pernas acknowledged the need for bus shelters and other amenities for transit riders. He added that Florida's environment is hard on people who have to wait for the bus. He stated shelter from the rain, heat, and other elements is just as important as the service.

Councilman Pernas stated a great deal is being done to connect bicycle paths and multimodal transportation corridors, noting this was very encouraging. He hoped transportation would become more of an interconnected, integrated system.

6. Who should transit target as primary customers? Persons without access to a vehicle, community, the environment, businesses, tourism?

   Councilman Pernas stated all of the customers mentioned should be targeted for better delivery of services and to understand their needs. He felt, however, CAT should prioritize senior citizens and low-income workers who are disproportionately affected by the lack of transit.

   He added in order for CAT to be successful, they need to reach out to people with no other means of transportation.

7. How best do we pay for transit services? User fees? Including improvements through new developments, partnerships with major employers, businesses, institutions, and increased advertising? Is there an opportunity to consider innovative funding strategies to help fund transit?

   Councilman Pernas noted all financing options were important. He noted in some cases there may be an opportunity to partner with businesses and private companies. He added there were companies using vanpools, which were a great tool in places like the hotels along the beaches. He noted those workers are not likely to be the highest-salaried workers; therefore, user fees can only cover so much of the cost.

   He noted state and federal grants should be leveraged to bring more transit to Collier. There should be better coordination between businesses who need workers and areas of the community that may not be able to access those opportunities.

   Councilman Pernas stated he understood transit was expensive. He noted, however, it has the potential to create more economic activity when it connects workers with jobs. You cannot just look at the cost of providing transit. You must also consider how it improves the quality of life for persons and how it connects people with opportunities.

8. Would service expansion be considered if a municipality funded it?

   Councilman Pernas noted this would not work for a community like Everglades City with a population of 352 people as it does not have an adequate tax base. For larger municipalities like Marco Island with a much larger tax base it may work.

Councilman Pernas stated he would not discount this way of funding transit service, but it has to recognize this will not work for every community.

9. Can you comment on the outlook for transit?

Councilman Pernas stated the outlook for transit was actually promising in spite of all of the challenges. He stated Collier County cannot continue to widen roads indefinitely. He stated traffic continues to get worse, and the solution is not to continue to build new roads either. Transit can alleviate traffic congestion and should be considered a solution.

He added even when widening roads, transit should be considered. As an example, he stated when widening US 41, there should be transit lanes added.

He was optimistic about light rail. He stated that light rail has already been implemented and ridership is steadily increasing (Orlando to Tampa, Miami to Orlando). Councilman Pernas stated he expected the next 20 years to see more light-rail as Florida becomes better connected and starts addressing congestion.

Situational Appraisal
Technical Memo No. 1

Date: **August 23, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: **Situational Appraisal – Technical Memo No. 1 Revised - Action Required**

The Situational Appraisal as been updated. Please review.

Table of Contents

1 BASELINE CONDITIONS, DEMAND ESTIMATION & LAND USE DEVELOPMENT ASSESSMENT 6
1.1 Study Area 7
1.2 Population Profile 8
1.3 Demographic Characteristics 16
1.4 Transportation Disadvantaged Population 20
1.4.1 Recent Improvements to Paratransit Services 22
1.5 Labor and Employment Characteristics 22
1.6 Educational Attainment 27
1.7 Tourism 28
1.8 Major Trip Generators 30
1.9 Major Developments 33
1.10 Existing and Future Land Use 34
1.11 Commuter Travel Patterns 37
1.12 Roadway Conditions 38

2 TRANSIT PERFORMANCE 38
2.1 Existing Transit Services 39
2.1.1 Fixed route services 39
2.1.2 Paratransit Services 42
2.1.3 Technology Solutions 43
2.1.4 Fare Structure 44
2.1.5 Transit Facilities 44
2.1.6 Vehicle Inventory 46
2.1.7 Safety 47
2.2 Other Transportation Service Providers 47
2.3 Comprehensive Operations Analysis 2021 - Recap 48
2.4 Transit Usage 49
2.4.1 Route Ridership by Month 49
2.4.2 Farebox Recovery 53
2.5 Trend and Peer Comparison Analysis 55
2.5.1 Peer Selection 56
2.5.2 Normalizing Data 58
2.5.3 Performance Measures 58
2.5.4 Effectiveness Measures 63
2.5.5 Efficiency Measures 65
2.5.6 Key Findings 69

3 PUBLIC OUTREACH ..... ERROR! BOOKMARK NOT DEFINED.
3.1 On-Board Surveys 1
3.1.1 Survey Characteristics 1
3.1.2 Trip Purpose ..... **Error! Bookmark not defined.**
3.1.3 Origin and Destination Characteristics ..... **Error! Bookmark not defined.**
3.1.4 Passenger Travel Characteristics ..... **Error! Bookmark not defined.**
3.1.5 Transit Dependency ..... **Error! Bookmark not defined.**
3.1.6 Passenger Demographic Information 2
3.2 Online Surveys ..... **Error! Bookmark not defined.**
3.2.1 CAT Sticker Survey ..... **Error! Bookmark not defined.**
3.2.2 Baseline CAT Survey ..... **Error! Bookmark not defined.**
Introduction 2
Initial Peer Group 2

Overview of Methodology 3
Normalizing Cost Data 5
Comparison of Results with Previous TDP 6
Stage 2 Secondary Screening 7
Final Peer Group Selection 7
Characteristics of Peer Systems 9
Primary Review Data Values for All Factors and Potential Peers 1
Primary Review Likeness Scores for All Factors and Potential Peers 1

LIST OF TABLES

Table 1-1: Collier County Demographic Characteristics 17
Table 1-2: Collier County transportation disadvantaged trips served. 20
Table 1-3: Top Employers in Collier County in 2023. 31
Table 1-4: Top Ten Planned Unit Developments in Collier County by Area. 33
Table 1-5: Future Land Use in Collier County. 37
Table 1-6: Journey-to-Work Characteristics. 38
Table 2-1: Existing Fixed-Route Services in Collier County. 39
Table 2-2: Park-and-ride locations and connections. 41
Table 2-3: Fare Structure in Collier County (2024) 44
Table 2-4: CAT Vehicle Inventory 2024 46
Table 2-5: Fare Structure in Collier County (2024) 54
Table 2-6: System Performance Review Measures 55
Table 2-7: Transit System Peer Review Selection 56
Table 2-8: Average of Likeness Score Sums by Peer Group 57
Table 3-1: Transit System Peer Review Selection 3
Table 3-2: Average of Likeness Score Sums by Peer Group 6
Table 3-3: Average of Likeness Score Sums by Peer Group. 8

LIST OF FIGURES

Figure 1-1: Map of Study Area. 7
Figure 1-2: Collier population totals, estimates, and projections (Source: US Census Bureau and BEBR). 8
Figure 1-3: Historical and Projected Decennial Population Growth Rates (Source: US Census Bureau). 9
Figure 1-4: Collier County year by year population projections (Source: Collier County Government). 10
Figure 1-5: Collier County Population Density by TAZs in 2019. 11
Figure 1-6: Collier County Projected Population Density by TAZs in 2050. 12
Figure 1-7: Collier County Population Density Growth Rate per TAZ from 2019 to 2050. 13
Figure 1-8: Collier County Dwelling Unit Density per TAZ in 2019. 14
Figure 1-9: Collier County Projected Dwelling Unit Density per TAZ in 2050. 15
Figure 1-10: Collier County Estimated Dwelling Unit Increase by TAZ from 2019 to 2050. 16
Figure 1-11: Household Income Over Time in Collier County 18
Figure 1-12: Population Age Distribution in Collier County 19
Figure 1-13: Distribution of Households with No Vehicle in Collier County in 2022. 20
Figure 1-14: Collier County transportation disadvantaged trips, 2019–2023 (Source: Florida Commission for the Transportation Disadvantaged Annual Operations Reports (AOR)). 21
Figure 1-15: Ratio of TD Trips to Total Population. 22
Figure 1-16: Collier County Employment Density by TAZs in 2019. 23
Figure 1-17: Collier County Projected Employment Density by TAZs in 2050. 24
Figure 1-18: Collier County Estimated Employment Density Growth by TAZs from 2019 to 2050. 25
Figure 1-19: Collier County Labor Force Distribution by Service Area, 2010, 2020, and 2022. 26
Figure 1-20: National, State and County Unemployment 27
Figure 1-21: Educational Attainment in Collier County. 28
Figure 1-22: Transit Access to Point of Interest Destinations in Collier County. 29
Figure 1-23: Density Map of Point of Interest Destinations by TAZ. 30

Figure 1-24: Transit Access to Top Employers in Collier County in 2023. 32
Figure 1-25: Density Map of Top Employer Locations by TAZ. 33
Figure 1-26: Status of Planned Unit Developments in Collier County. 34
Figure 1-27: Existing Land Use Zoning Areas in Collier County. 35
Figure 1-28: Future Land Use Designation in Collier County as of 2024. 36
Figure 2-1: Existing CAT Services 40
Figure 2-2: Paratransit Ridership 42
Figure 2-3: CAT Radio Road Transit Facility (Source: Google Street View) 45
Figure 2-4: Intermodal Transfer Station (Source: Google Street View) 45
Figure 2-5: Station location for private bus service and Park and Ride locations along transit network. 48
Figure 2-6: Total Monthly Ridership in Collier County during FY2023 49
Figure 2-7: Total Passengers per Route in Collier County during FY2023 50
Figure 2-8: Passengers per Revenue Hour in Collier County during FY2023 50
Figure 2-9: Seasonal Variation of Average Monthly Ridership 51
Figure 2-10: Top Ridership Routes in Collier County in FY2023 52
Figure 2-11: Average Monthly Ridership of Top Ridership Routes in Collier County in FY2023 53
Figure 2-12: 5-year trend (left) and 2022 peer comparison (right) charts for unlinked passenger trips. 59
Figure 2-13: 5-year trend (left) and 2022 peer comparison (right) charts for passenger miles travelled. 59
Figure 2-14: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue miles. 60
Figure 2-15: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue hours. 60
Figure 2-16: 5-year trend (left) and 2022 peer comparison (right) for vehicles operating at maximum service. 61
Figure 2-17: 5-year trend (left) and 2022 peer comparison (right) for vehicles available at maximum service. 61
Figure 2-18: 5-year trend (left) and 2022 peer comparison (right) charts for operating expense. 62
Figure 2-19: 5-year trend (left) and 2022 peer comparison (right) charts for fare revenue. 62
Figure 2-20: 5-year trend (left) and 2022 peer comparison (right) for unlinked passenger trips per capita. 63
Figure 2-21: 5-year trend (left) and 2022 peer comparison (right) for passenger miles travelled per capita. 63
Figure 2-22: 5-year trend (left) and 2022 peer comparison (right) for vehicle revenue miles per capita. 64
Figure 2-23: 5-year trend (left) and 2022 peer comparison (right) for unlinked trips per vehicle revenue mile. 64
Figure 2-24: 5-year trend (left) and 2022 peer comparison (right) for unlinked trips per vehicle revenue hour. 65
Figure 2-25: 5-year trend (left) and 2022 peer comparison (right) charts for operating expense per capita. 65
Figure 2-26: 5-year trend (left) and 2022 peer comparison (right) for operating expense per unlinked trip. 66
Figure 2-27: 5-year trend (left) and 2022 peer comparison (right) for operating expense per passenger mile. 66
Figure 2-28: 5-year trend (left) and 2022 peer comparison (right) for operating expense per revenue mile. 67
Figure 2-29: 5-year trend (left) and 2022 peer comparison (right) for operating expense per revenue hour. 67
Figure 2-30: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue mile per vehicle. 68
Figure 2-31: 5-year trend (left) and 2022 peer comparison (right) charts for farebox recovery ratio. 68
Figure 2-32: 5-year trend (left) and 2022 peer comparison (right) charts for average fare. 69
Figure 3-1: Distribution of satisfaction level with CAT service from survey responses. **Error! Bookmark not defined.**
Figure 3-2: Distribution of trip purposes from survey responses. **Error! Bookmark not defined.**
Figure 3-3: Distribution of most taken routes from survey responses. 3
Figure 3-4: Distribution of trip destinations from survey responses. **Error! Bookmark not defined.**

APPENDIX A HEADING 1 1
A.1 Heading 2 1
A.1.1 Heading 3 1

1 Baseline Conditions, Demand Estimation & Land Use Development Assessment

The baseline conditions analysis provides a detailed report on the existing and projected future conditions of the service area. The foundation of the transportation development plan will be based on the contextual information presented in this section. The collected data will also be used in the Situational Appraisal to provide the basis for transit improvement considerations.

The following topics were reviewed and analyzed for Collier County in the context of the TDP:

- Study Area
- Population Profile
- Demographic Characteristics
- Transportation Disadvantaged Population
- Labor and Employment Characteristics
- Educational Attainment
- Tourism
- Major Trip Generators
- Major Developments
- Existing and Future Land Use
- Commuter Travel Patterns
- Roadway Conditions

Data collected for select population, demographic, and socioeconomic characteristics are supported by various maps and tables. Primary data sources include the U.S. Census Bureau, specifically from the 2020 Decennial Census and the 5-Year American Community Survey (ACS), Collier County, Florida Commission for the Transportation Disadvantaged, Collier Area Transit, and the Regional Economic Research Institute at Florida Gulf Coast University, supplemented by local and regional agency sources as necessary.



1.1 Study Area

Collier County is in southwest Florida, east of the Gulf of Mexico. The county is bordered on the northwest, northeast, east, south, respectively by Lee, Hendry, Broward, Miami-Dade, and Monroe counties. Collier County has three municipalities: Everglades City, Marco Island, and Naples, the County seat.

In terms of geographical area, Collier County is the largest county in Florida with a land area of approximately 1,996.8 square miles according to the 2020 Decennial Census from the US Census Bureau. A significant portion of the county area is designated as protected lands (more than 1,875 square miles), primarily in the eastern and southern parts of the county.

Figure 1-1 shows the extent of the study area. Due to the size of Collier County, a study area has been produced as outlined by the red boundary, which covers the existing transit network along with the core populated areas of the County and excludes some of the park land. For presentation purposes moving forward in this document, some of the map figures will be zoomed to the study area extent to show greater detail and avoid wasted space.

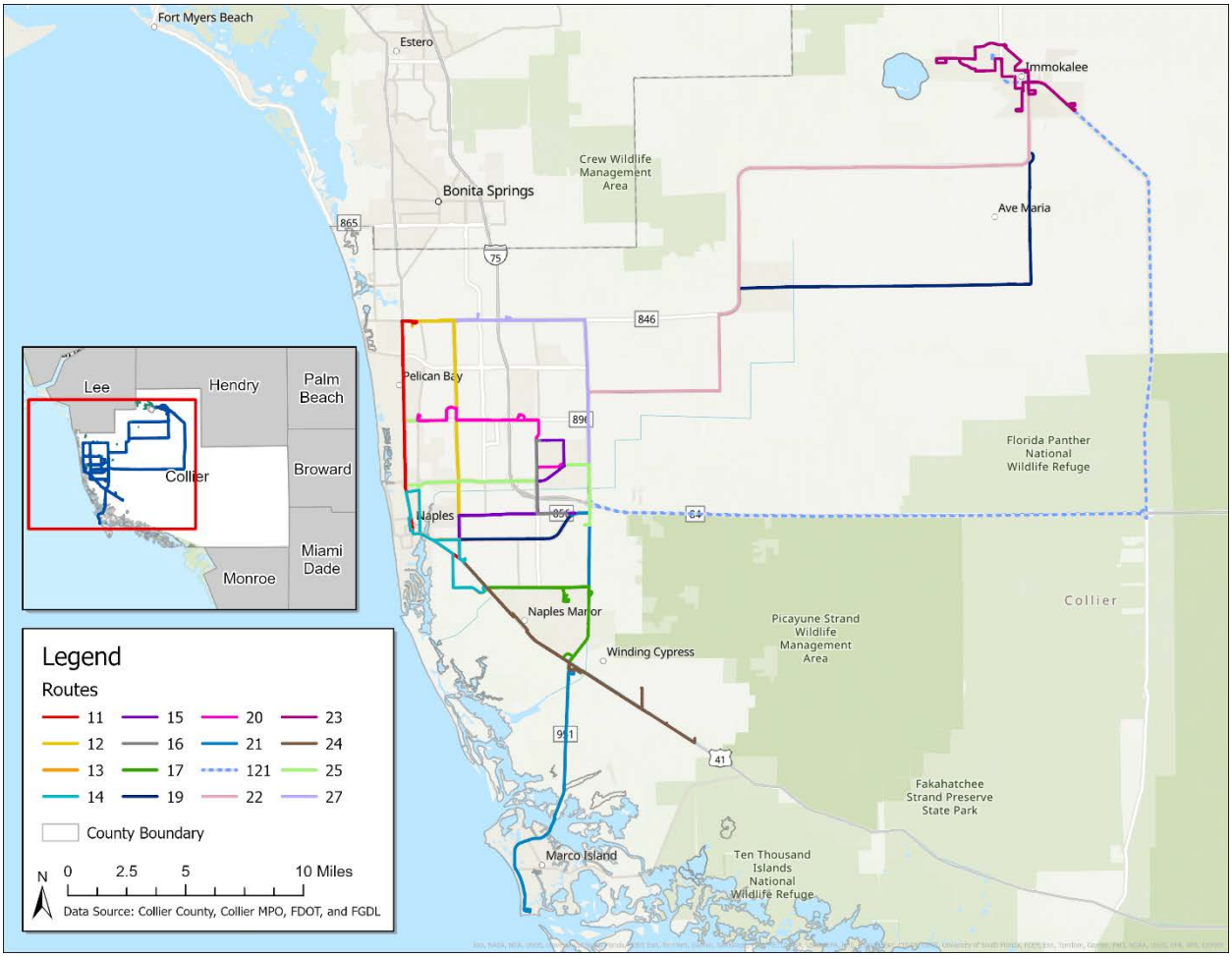


Figure 1-1: Map of Study Area.

1.2 Population Profile

As of the 2020 Decennial Census, Collier County was ranked the 19th most populous county in Florida. As per the US Census Bureau 2020 Decennial Census, the county population accounts for 1.74% of the total state population in 2020 and is estimated to grow to 1.83% by 2050 based on State population projections.

The Collier County population has been steadily increasing over the last few decades, as shown in Figure 1-2 below. Population values were obtained from US Census Bureau decennial censuses and annual population estimates. There was a slight dip in the census population count in 2020 compared to the estimated values for the previous years, likely due to the COVID-19 pandemic. The population projection values were obtained from the Florida Bureau of Economic and Business Research (BEBR) at 5-year intervals until 2050. Collier County's population is projected to continue increasing steadily.

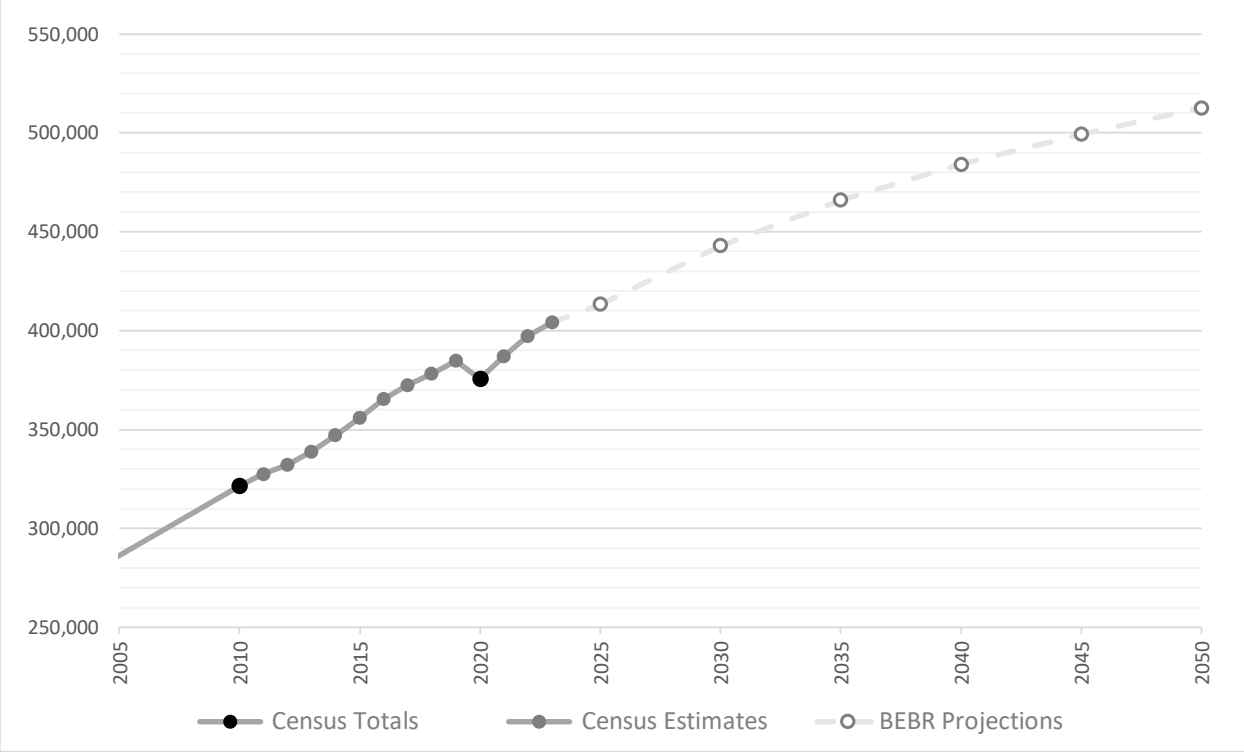


Figure 1-2: Collier population totals, estimates, and projections (Source: US Census Bureau and BEBR).

Collier County's population has been increasing during the past few decades; however, the overall growth rate is expected to slow over the next couple of decades, like state-wide conditions. In general, the county has consistently experienced and will continue to have higher rates of growth compared to that of Florida, as shown in Figure 1-3 below.

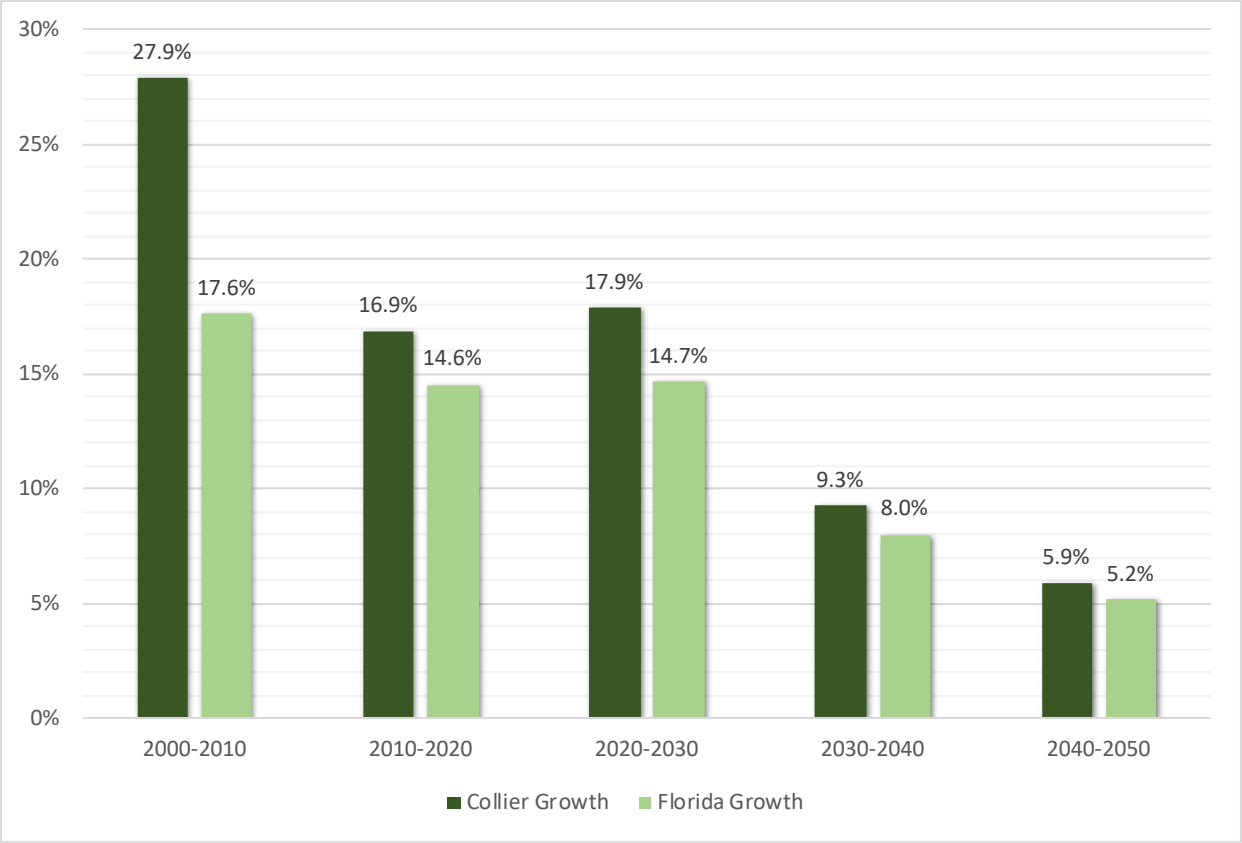


Figure 1-3: Historical and Projected Decennial Population Growth Rates (Source: US Census Bureau).

Collier County typically receives a significant number of tourists and seasonal residents, impacting the travel patterns and increasing traffic congestion during the peak season periods. The County developed annual population projections for the fiscal year and peak season periods to better plan for seasonal demand impact on public services. Figure 1-4 displays these projection values; with annual fiscal year population values reflecting the permanent resident population and peak season population values estimated with a constant adjustment factor.

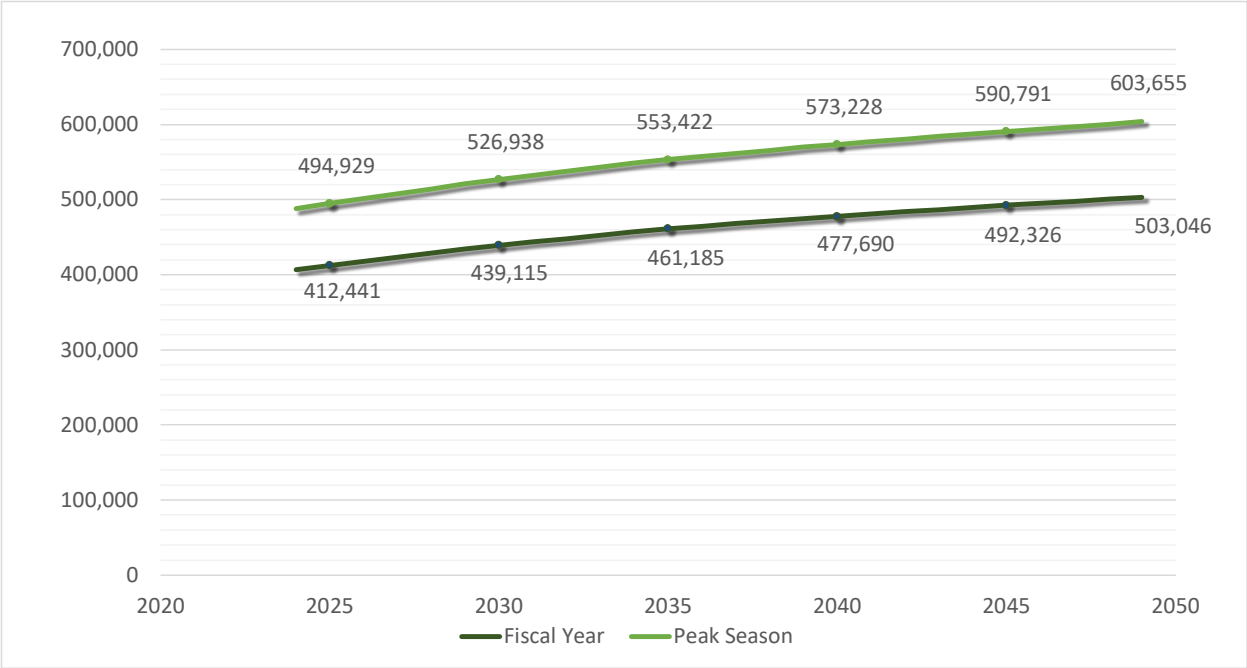


Figure 1-4: Collier County year by year population projections (Source: Collier County Government).

Traffic Analysis Zones (TAZ) were used to analyze statistics and change at a smaller geographic unit. Estimated and projected population, employment, and dwelling density values for 2019 and 2050 were interpolated from 2015 values and 2045 projections. Employment will be discussed in a later section.

Figure 1-5 and Figure 1-6 depict population density at the TAZ level for 2019 and 2050 respectively. The estimated population distribution within Collier County in 2019 is highly concentrated in the central business and residential districts of Immokalee, Ave Maria, Pelican Bay, Golden Gate, and other communities around North and South Naples. Golden Gate especially has a high concentration of population with several red and orange TAZ blocks symbolizing higher population density. The distribution pattern remains very similar for the projected 2050 population densities. The areas with higher population density are all located near, if not along the existing transit network, which means that the current network is doing well in providing service in the more populated areas.

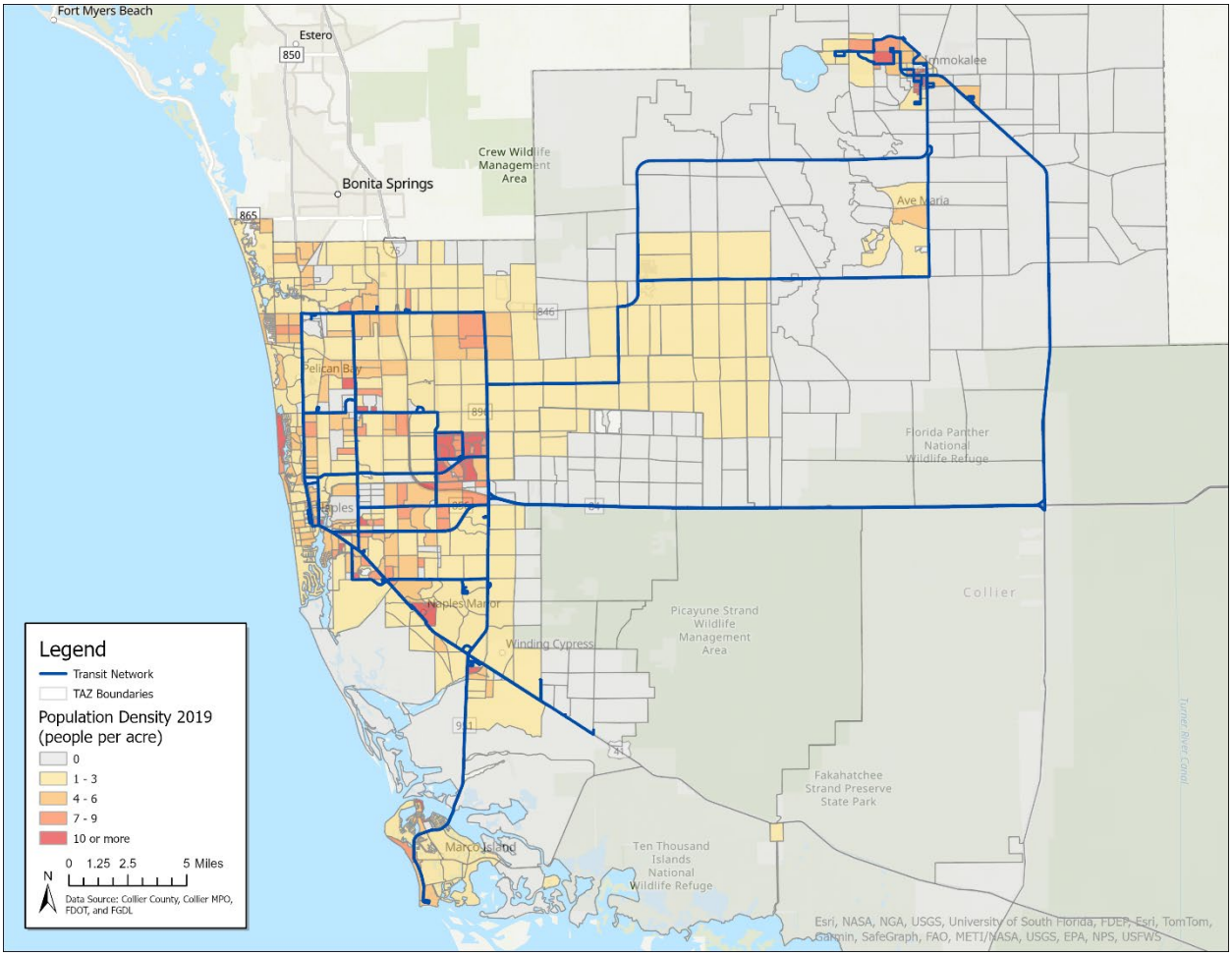


Figure 1-5: Collier County Estimated Population Density by TAZs in 2019.

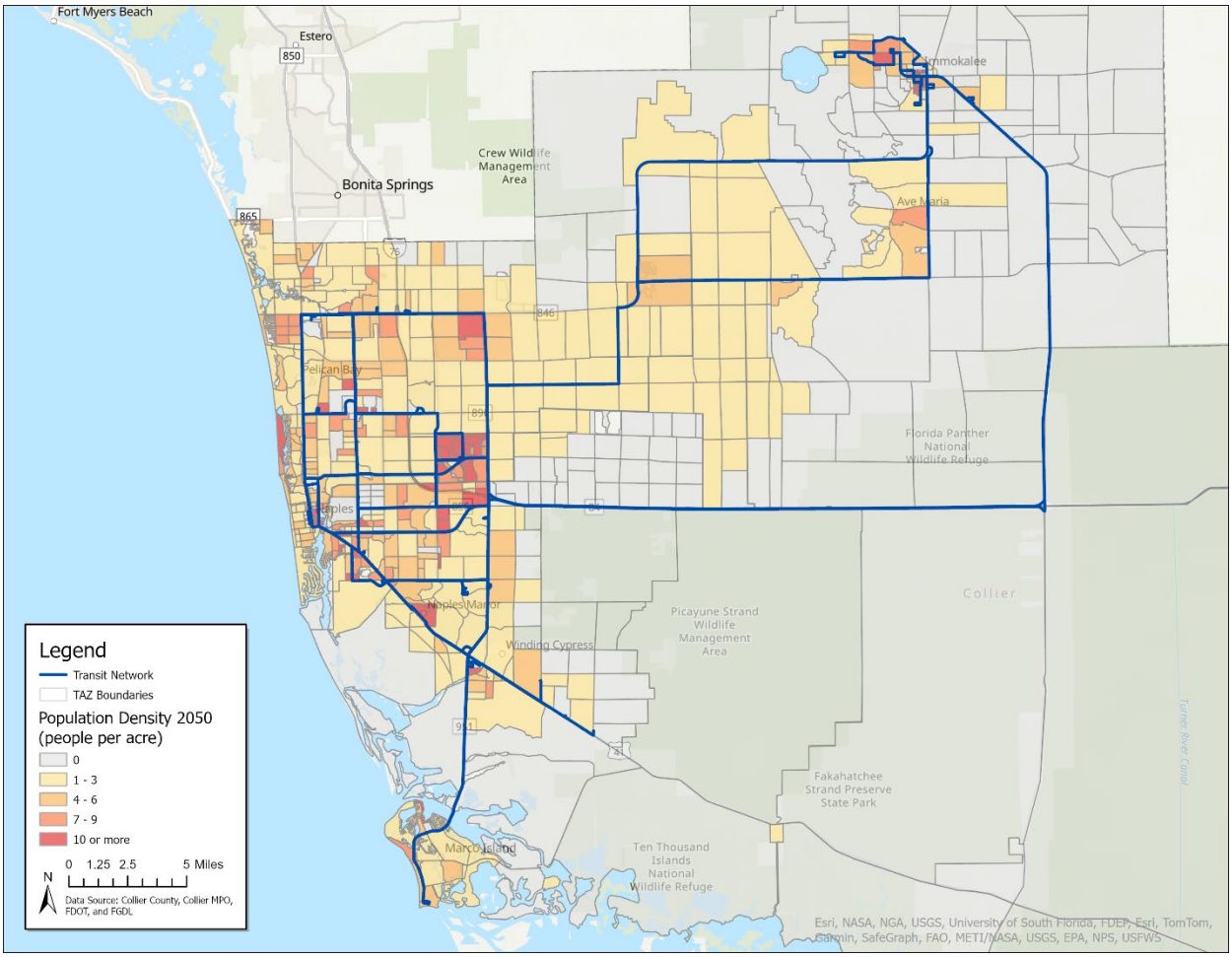


Figure 1-6: Collier County Projected Population Density by TAZs in 2050.

Figure 1-7 shows the population density increase between the 2019 estimates and the 2050 projections. This growth rate map indicates greater increases for the TAZs within and around the urban communities of Immokalee, Ave Maria, Orangetree (west of Ave Maria), and Golden Gate. There are also a few TAZ blocks around North and South Naples with high growth rates, symbolized in red showing higher population density increase. These areas of high growth indicate potential for more transit demand as the population increases. The agricultural areas next to these communities appear to have little to no population growth, specifically outside of Immokalee and in the parks or nature reserves, which is expected as there are limited residential areas and less dwelling units there.

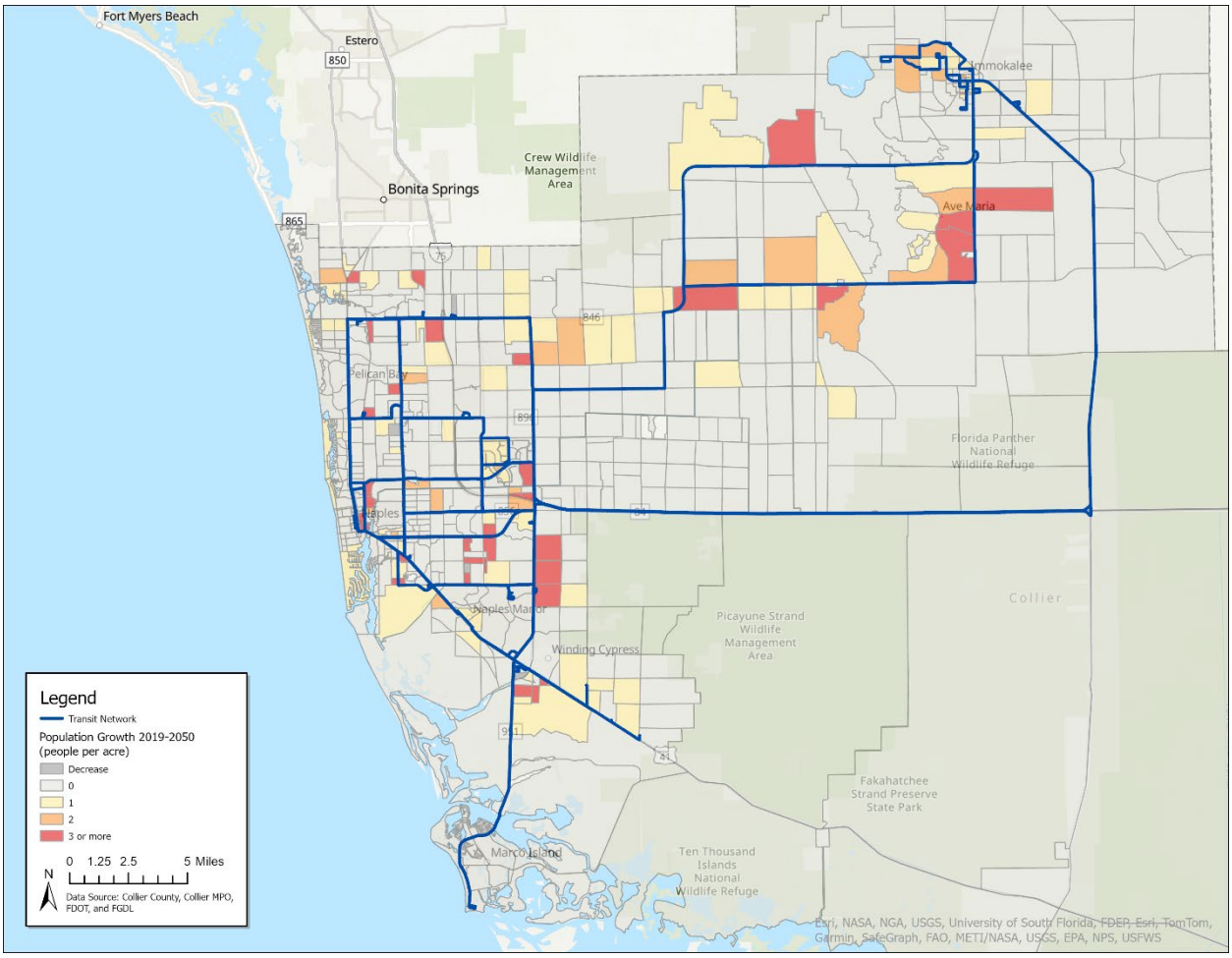


Figure 1-7: Collier County Population Density Growth per TAZ from 2019 to 2050.

Figure 1-8 and Figure 1-9 illustrate the distribution of dwelling units at the TAZ level for 2019 and 2050 respectively. Similar to the population distribution in Collier County, higher numbers of dwelling units are seen in and around Marco Island and Golden Gate, indicating greater resident occupancy and transit demand in these regions. Higher dwelling unit numbers are also observed along the Gulf of Mexico coast along the west end of Collier County, mostly around Pelican Bay. This distribution pattern remains very similar for the 2050 estimated projections. Again, following population density patterns, areas with higher numbers of dwelling units are all located near, if not along, the existing transit network, indicating that the current network is doing well in providing service in the more populous residential areas.

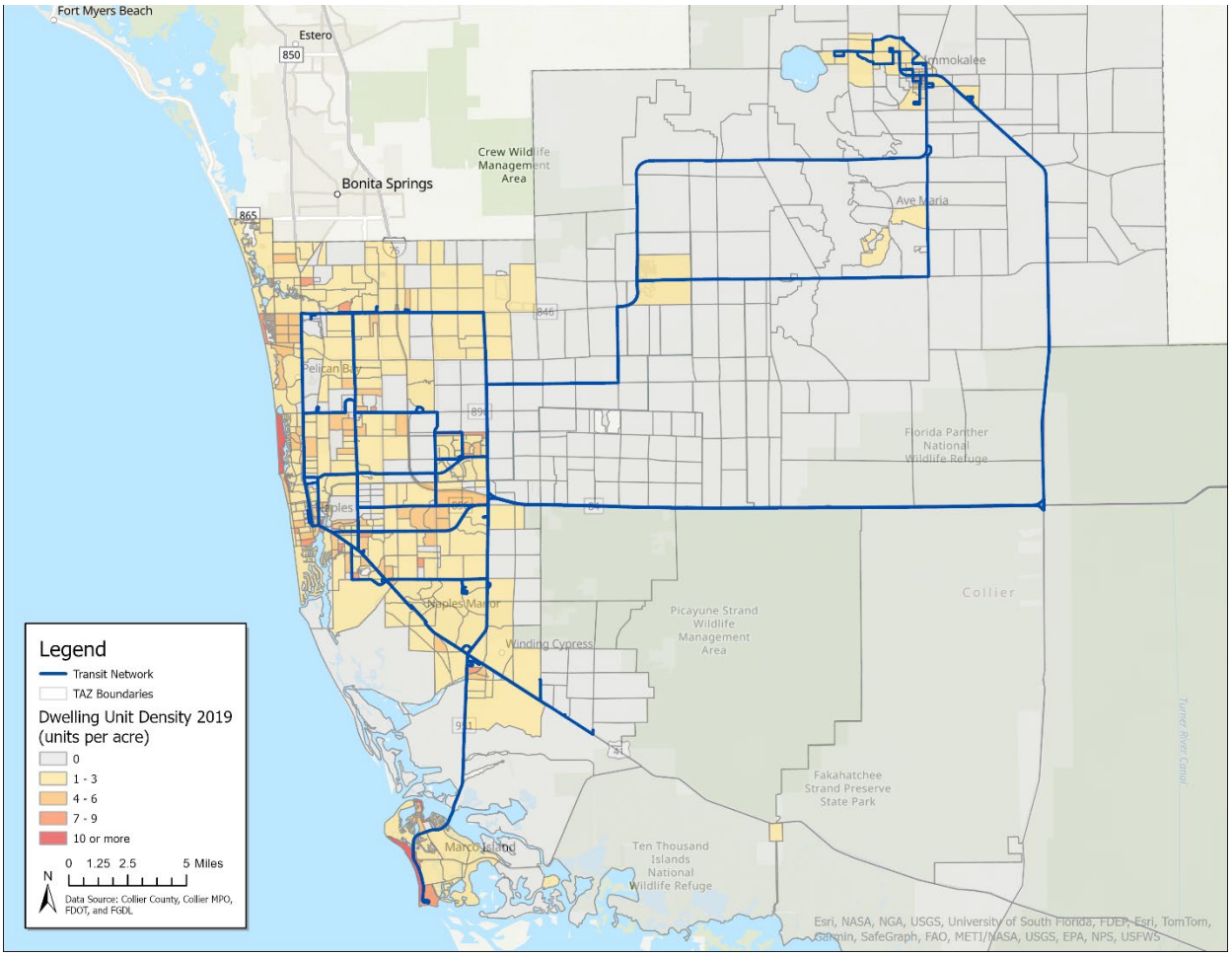


Figure 1-8: Collier County Estimated Dwelling Unit Density per TAZ in 2019.

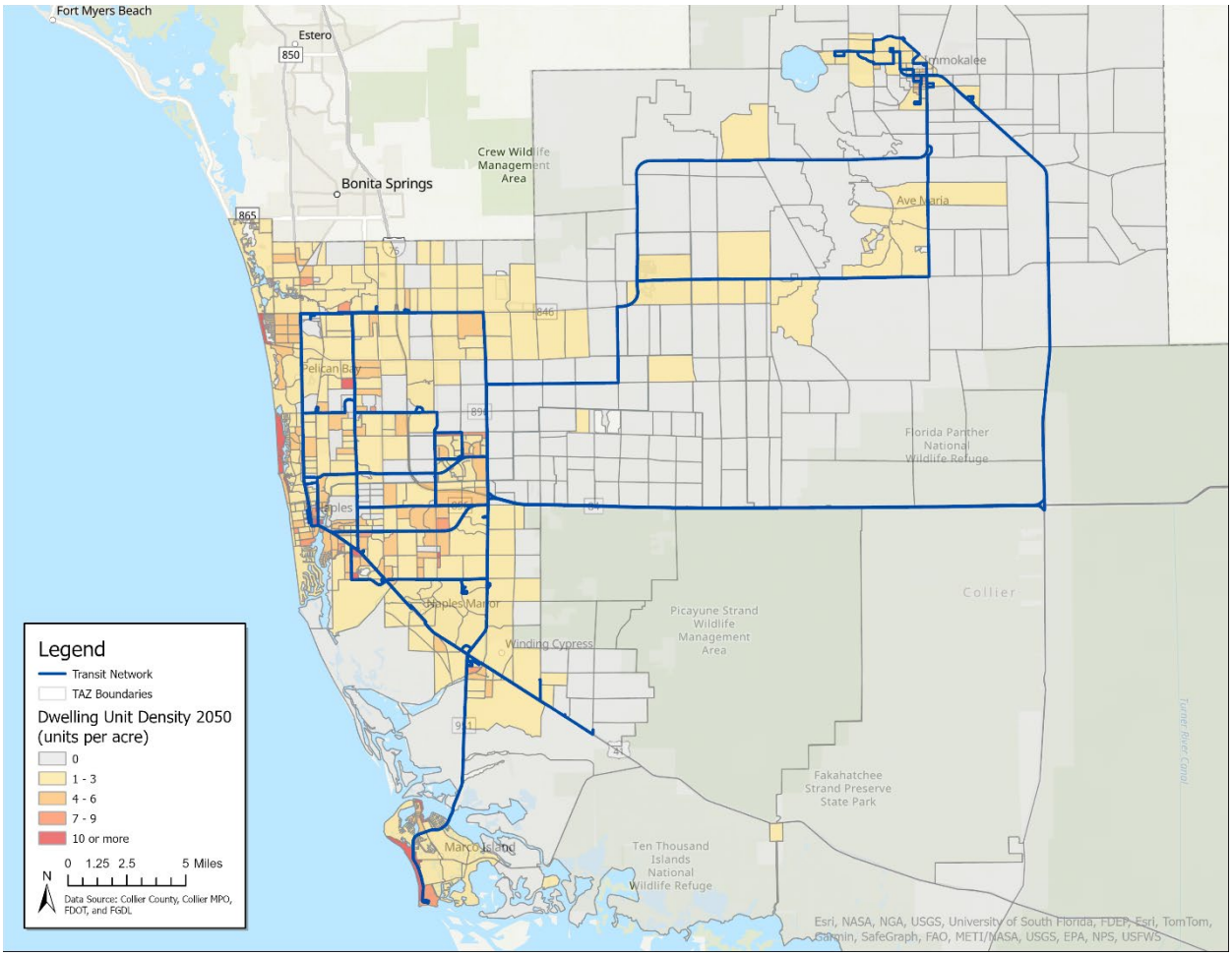


Figure 1-9: Collier County Projected Dwelling Unit Density per TAZ in 2050.

Figure 1-10 shows the increase in dwelling unit density per TAZ between the 2019 estimates and the 2050 projections. This growth change map indicates greater increases in the Ave Maria community and a few small TAZs in North, East, and South Naples. As with population growth, the agricultural areas next to these communities appear to have little to no increase in dwelling units, specifically outside of Immokalee and in the parks or nature reserves, which is expected as there are limited residential areas and less dwelling units there. The increase in dwelling unit density appears to be slower than population density increase, as there are less higher increase blocks (symbolized by red and orange) in the dwelling unit density maps compared to the population density maps.

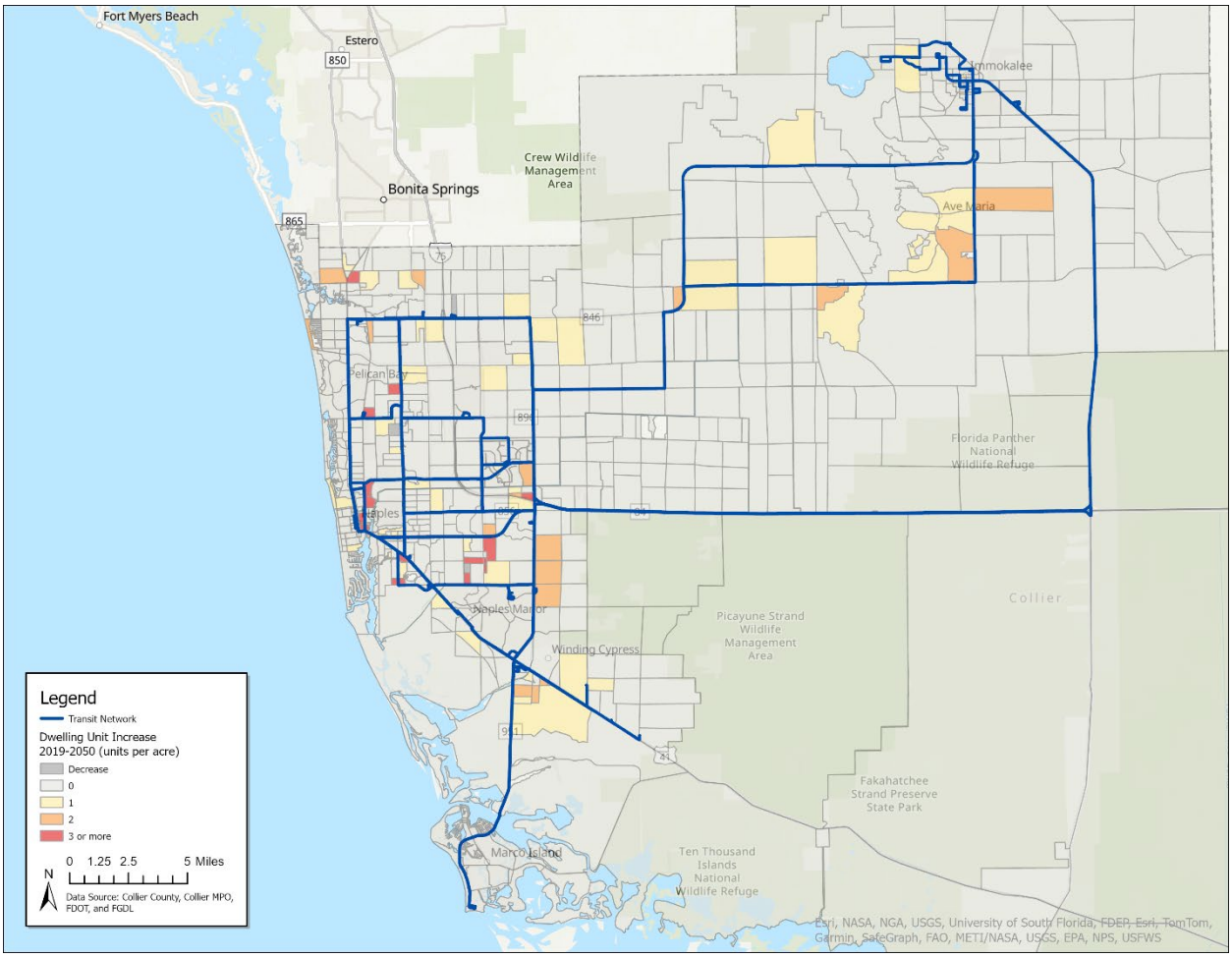


Figure 1-10: Collier County Dwelling Unit Density Increase by TAZ from 2019 to 2050.

1.3 Demographic Characteristics

Demographic characteristics such as age, household income, poverty status and the number of vehicles available in a household are key indicators to helping understand transit propensity. Table 1-1 summarizes these characteristics pulled from data from the United States Census Bureau in the years of 2010, 2018, 2020 and 2022.

Table 1-1: Collier County Demographic Characteristics

Characteristic	2010	2018	2020	2022
Gender				
Male	49.7%	49.3%	49.2%	49.5%
Female	50.3%	50.7%	50.8%	50.5%
Ethnic Origin				
White	85.8%	88.1%	84.5%	73.2%
Black or African American	6.6%	7.0%	6.8%	6.5%
Other	6.4%	3.6%	3.6%	5.6%
Two or more races	1.1%	1.3%	5.2%	14.6%
Hispanic Origin				
Not of Hispanic/Latino origin	74.8%	72.5%	72.0%	71.4%
Hispanic or Latino origin	25.2%	27.5%	28.0%	28.6%
Age				
<15 years	20.0%	18.8%	18.6%	18.2%
15-59 years	62.1%	59.9%	59.1%	59.8%
60+ years	17.9%	21.3%	22.3%	22.0%
Household Income				
Under $10,000	7.2%	6.3%	5.8%	4.9%
$10,000-$49,999	40.9%	35.8%	33.2%	28.9%
$50,000-$99,999	30.9%	30.0%	30.0%	28.9%
$100,000-$200,000	16.7%	20.9%	22.7%	25.9%
$200,000 or more	4.2%	7.0%	8.3%	11.4%
Poverty Status				
Above poverty level	86.2%	85.9%	87.2%	87.5%
Below poverty level	13.8%	14.1%	12.8%	12.5%
Vehicle Available in Household				
None	4.3%	4.3%	4.2%	4.3%
One	21.1%	20.6%	20.1%	20.3%
Two	42.5%	41.0%	40.5%	40.3%
Three or more	32.1%	34.1%	35.2%	35.2%

Source: 2010 ACS 5-year estimates, 2018 ACS 5-year estimates, 2020 ACS 5-year estimates, 2022 ACS 5-year estimates

A significant portion of the population owns two or more vehicles, and around a third of the residents in Collier County have an annual income exceeding $100,000. Combined, these statistics may indicate a lower propensity to use transit among the community. Household income reveals an increasing disparity between the rich and poor, as those earning over $100,000 have increased from 16.7% to 25.9%, while those earning under $10,000 have only decreased around 2%. Moreover, the percentage of the population living above the poverty line has only shown a slight increase. In Figure 1-11, changes in income brackets are shown over time.

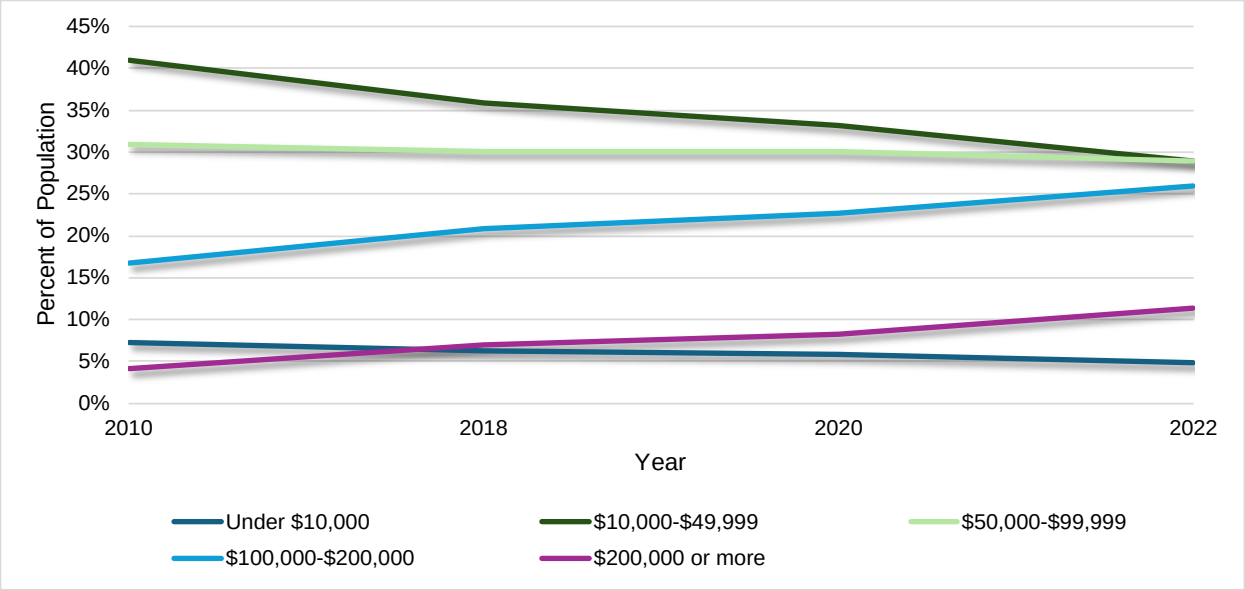


Figure 1-11: Household Income Over Time in Collier County

Source: 2010 ACS 5-year estimates, 2018 ACS 5-year estimates, 2020 ACS 5-year estimates, 2022 ACS 5-year estimates

The percentage of individuals earning less than $10,000 annually declined from 7.2% in 2010 to 4.9% in 2022, reflecting a 2% decrease. Conversely, those earning $100,000 or more saw a 10% increase, indicating a faster rate of income growth among higher earners. As incomes rise, fewer individuals may rely solely on public transportation, with increased access to private vehicles or alternative options. The percentage of those earning between $50,000 and $99,999 has remained stable, representing a group that may still favor public transit for its convenience and cost-effectiveness, particularly in urban areas where traffic congestion and parking costs are significant. Additionally, the proportion of individuals earning $200,000 or more grew by 7% between 2010 and 2022.

The age distribution among males and females has remained relatively consistent from 2000 to 2022, with a balanced ratio between genders, each comprising about half of the population. The ethnic majority remains Caucasian. Over time, there has been a slight decrease in the youth population and a corresponding rise in the senior population, underscoring the growing need for accessible services. Notably, the percentage of residents aged 60 and older is on the rise, potentially increasing demand for fixed-route transit and paratransit services. Figure 1-12 illustrates the population distribution by gender and age group, showing Collier's aging population, where older age groups now surpass younger ones.

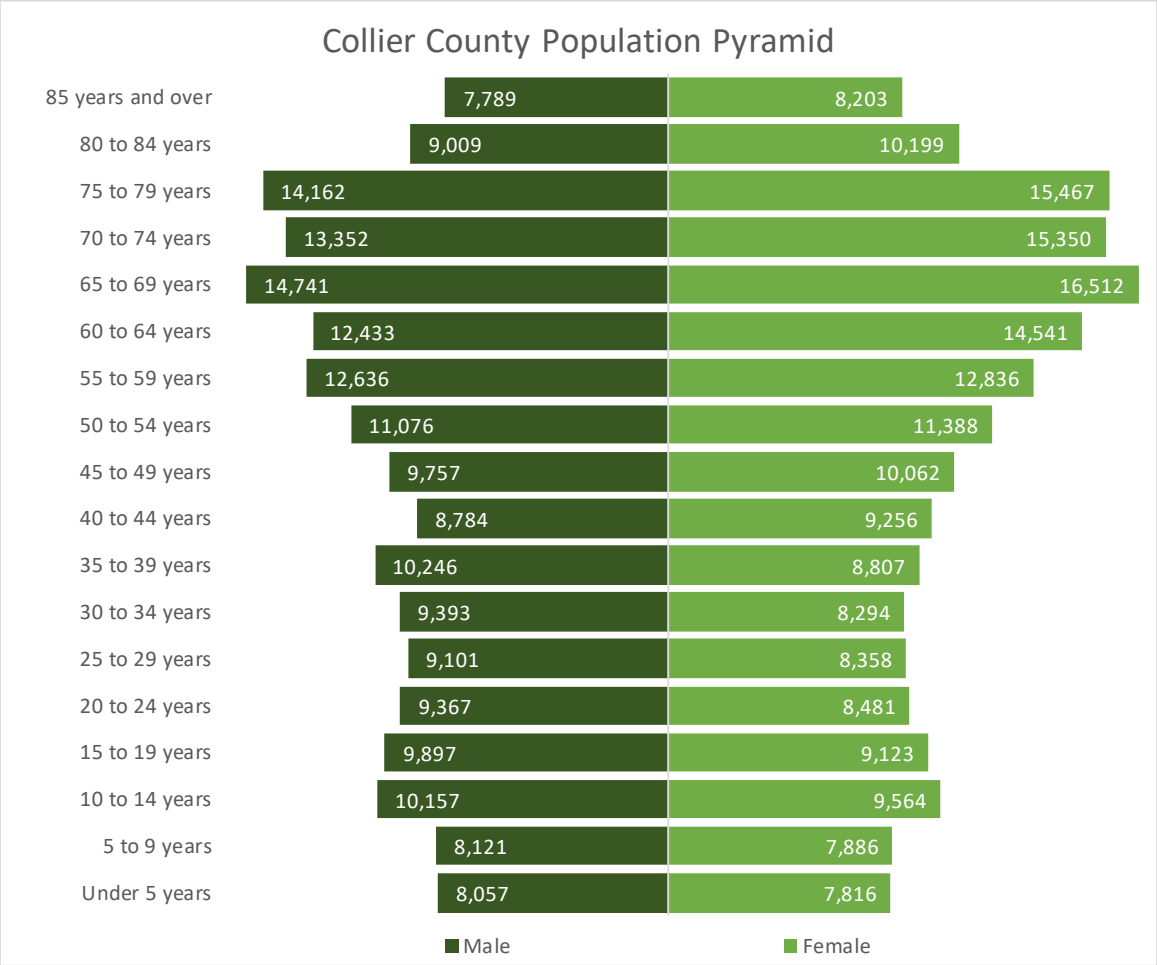


Figure 1-12: Population Age Distribution in Collier County

Since 2010, over 95% of households in Collier County have consistently had access to at least one vehicle, with less than 5% of households lacking a private vehicle. Although this percentage is small, it remains a significant demographic indicator, highlighting areas that may be more dependent on public transit and could potentially benefit from enhanced service. Increasing transit options could also encourage a shift among the majority who currently rely on private vehicles, offering convenient alternatives that promote greater use of public transportation for daily travel.

Figure 1-13 illustrates the distribution of households without vehicles across Collier County at the TAZ level. The existing transit network appears to serve most of these areas effectively, though coverage is limited in regions further east of Immokalee/Ave Maria near the conservation or rural areas. A small number of no-vehicle households are also present in Everglades; however, transit service is absent in much of southern Collier County, leaving this area underserved by the current network.

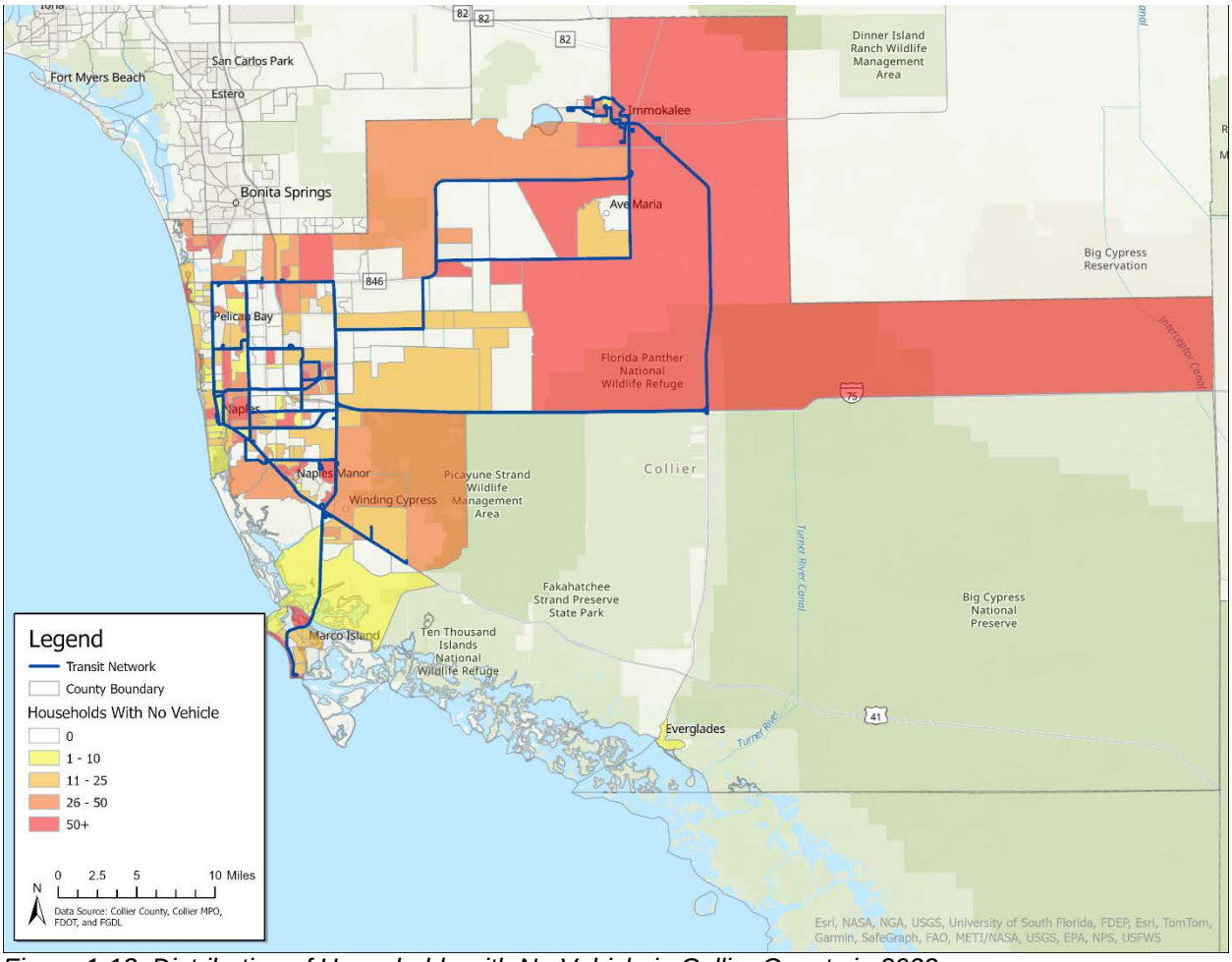


Figure 1-13: Distribution of Households with No Vehicle in Collier County in 2022.

1.4 Transportation Disadvantaged Population

The Transportation Disadvantaged (TD) population represents a key demographic with a growing need for public transit services, including fixed route services. As part of its paratransit service known as CAT Connect, CAT provides transportation to the eligible TD population with service available children who are handicapped or high-risk or at-risk persons, who because of physical or mental disability, income status, or age or who for other reasons are unable to transport themselves or to purchase transportation and are, therefore, dependent on others to obtain access to healthcare, employment, education, shopping, social activities, or other life sustaining activities. Table 1-2 shows the total number of TD trips served between 2019 to 2024.

Table 1-2: Collier County transportation disadvantaged trips served.

	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	% Change (2019-2024)
TD Trips Served	117,585	104,137	113,598	109,044	133,799	156,438	33.0%

Source: Collier County Community Transportation Coordinator's Annual Operating Reports, Fiscal Years 2019-2024.

The number of TD trips served through CAT's brokered system, as the Community Transportation Coordinator (CTC) for Collier County, increased 33% from 117,585 in 2019 to 156,438 in 2024. This demonstrates the increasing desire and need for more paratransit trips in the region. Figure 1-14 shows the number of TD passengers served from 2019 to 2024.

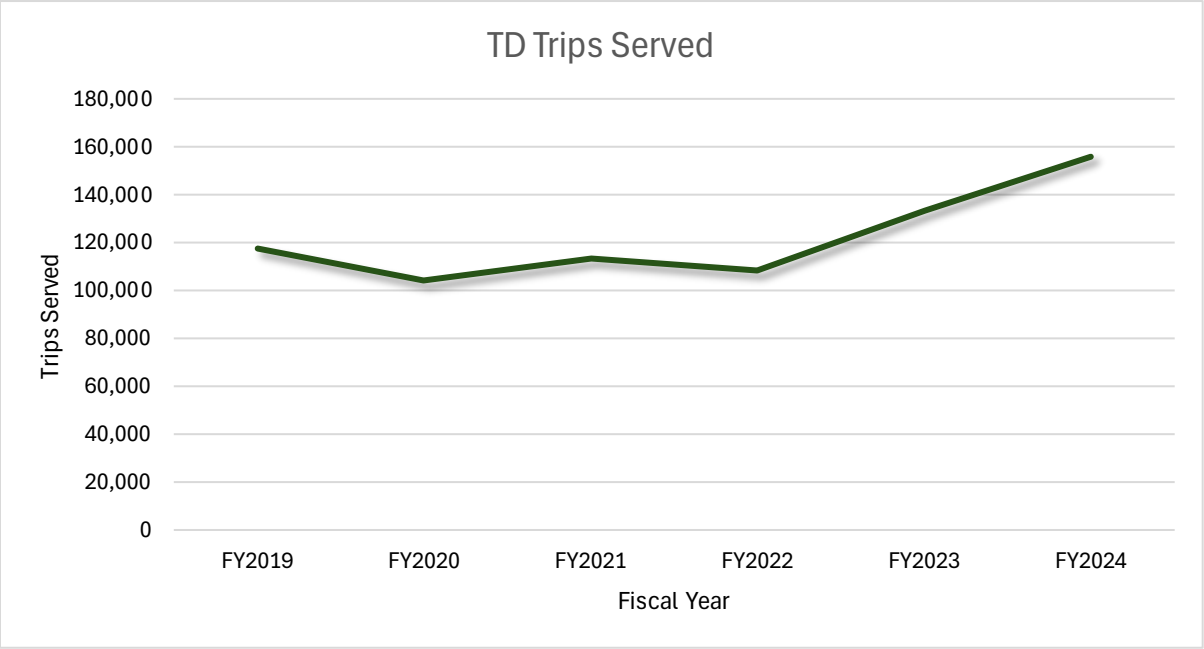


Figure 1-14: Collier County transportation disadvantaged trips, 2019–2023 (Source: Florida Commission for the Transportation Disadvantaged Annual Operations Reports (AOR)).

During this period, the total number of TD passengers followed an overall upward trend, despite occasional dips in ridership in 2020 and 2022, likely caused by the lasting effects of the COVID-19 pandemic. The most notable growth in TD trips occurred between 2022 and 2023, with a 22% increase. As TD ridership continues to expand, it will be essential to ensure adequate services are available to support this community, while also promoting access to fixed-route services, which offer a more cost-effective option for all users. As shown in Figure 1-15 below, TD trips have increased in line with population growth. As per the 2023 TDSP, the potential TD population is 165,309. This is expected to increase year after year.

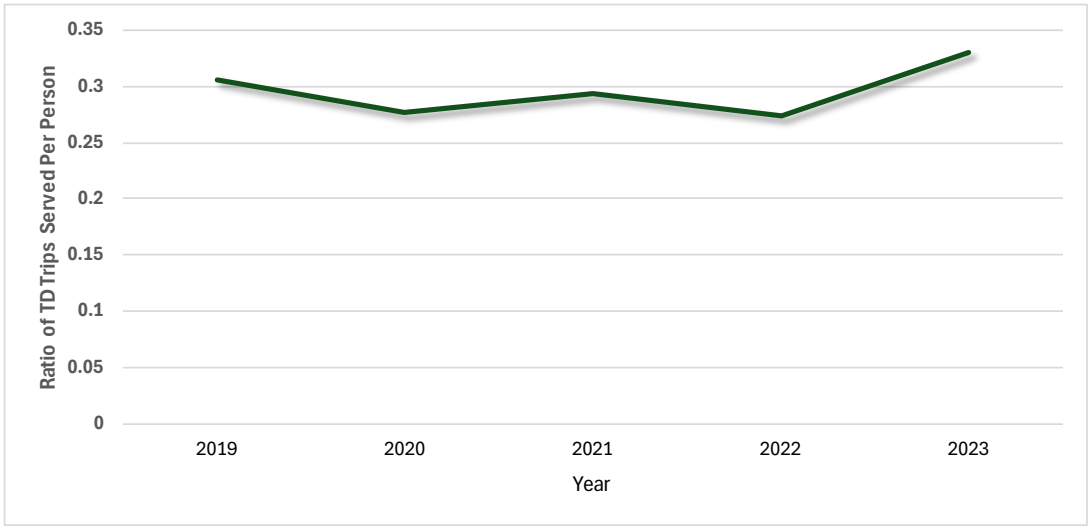


Figure 1-15: Ratio of TD Trips to Total Population.

1.4.1 RECENT IMPROVEMENTS TO PARATRANSIT SERVICES

Several improvements have been implemented to the paratransit services in Collier County as outlined by the CAT Connect Paratransit Service Report. Ecolane, a paratransit software, has been implemented, and Travel Trainings provided by CAT have been ongoing. Additionally, improvements to the phone systems have resulted in a decrease in average queuing time and a reduction in abandoned calls.

1.5 Labor and Employment Characteristics

The employment sector distribution in Collier County not only reflects the economic vitality and job market trends but also serves as a critical indicator of transit dependency and the necessity for inclusive transportation planning. Figure 1-16 and Figure 1-17 show the estimated employment densities at the TAZ level in 2019 and 2050 respectively. As commercial areas and places of employment grow and develop, urban communities such as Pelican Bay, Immokalee, and communities in North, East, and South Naples will experience a higher increase in employment numbers. This is depicted in the employment distribution maps, as the TAZs around these urban communities have higher employment numbers compared to the rest of the County, represented by yellow, orange, and red. These TAZs are mostly located along the existing transit network, which means that the current network is doing well in providing service in the more employment-dense areas.

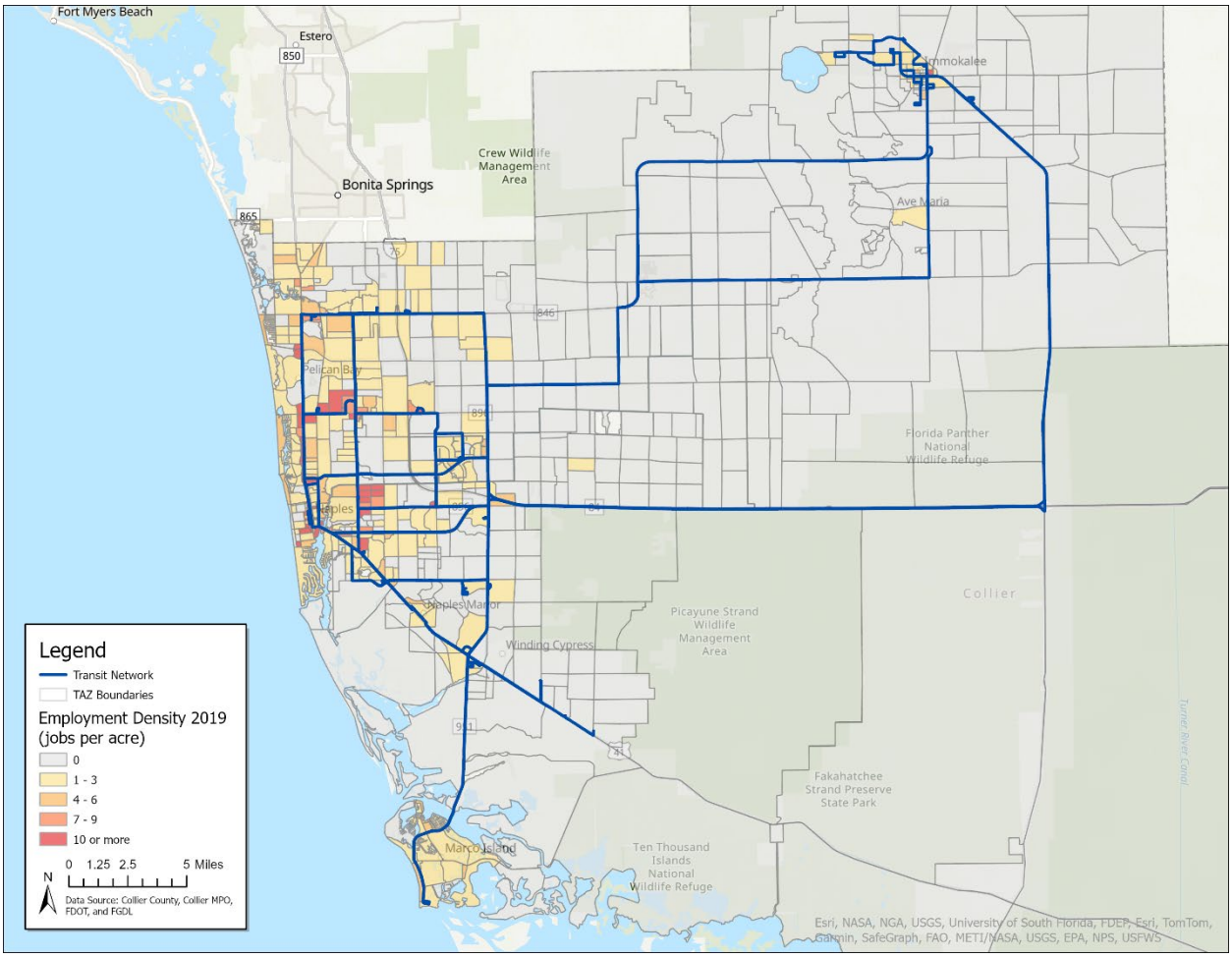


Figure 1-16: Collier County Estimated Employment Density by TAZs in 2019.

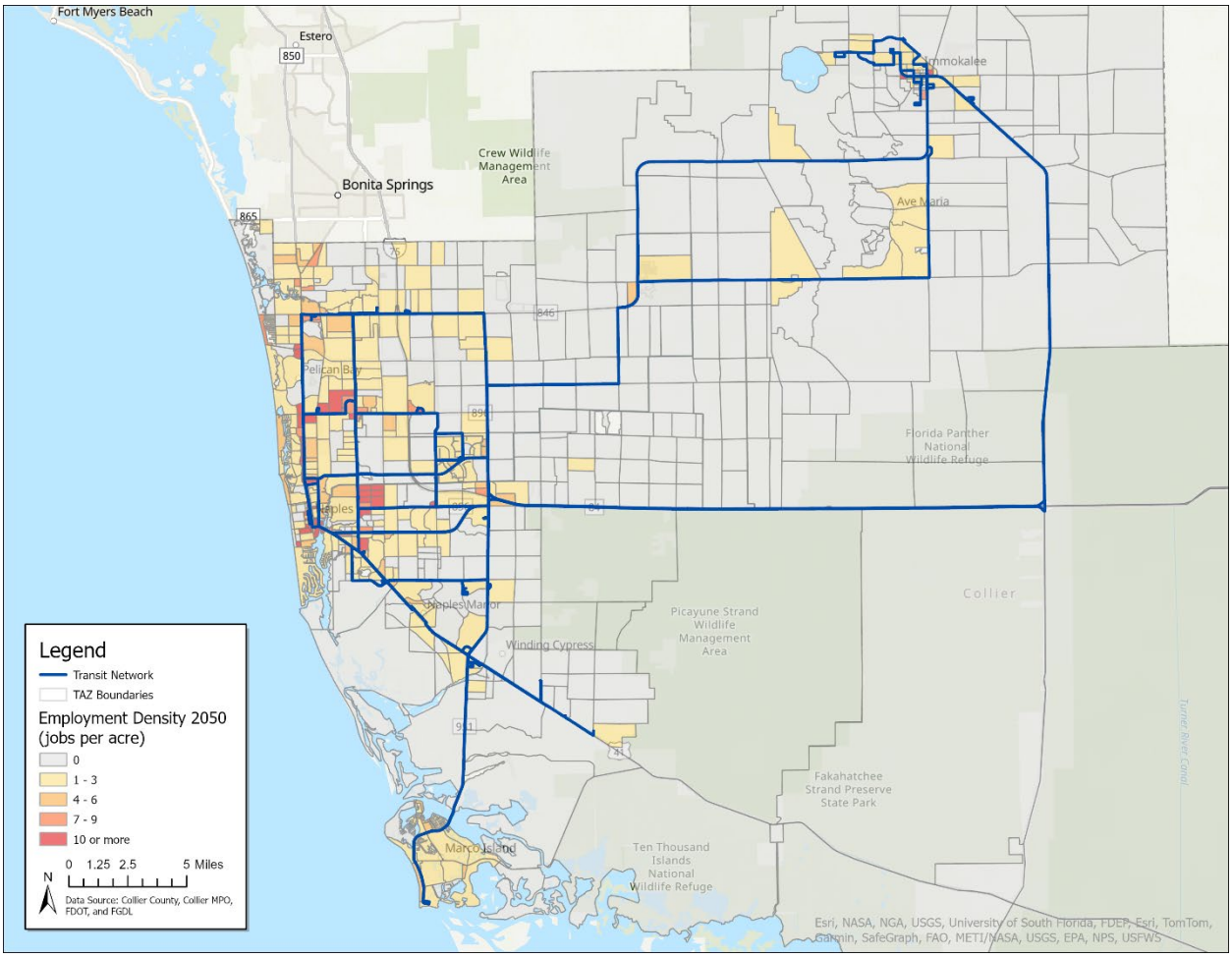


Figure 1-17: Collier County Projected Employment Density by TAZs in 2050.

Figure 1-18 shows the employment density increase between the 2019 estimates and the 2050 projections. The Collier County area does not seem to have a high increase in employment, as most of the TAZ blocks show little to no increase in employment density in the map. There are very few TAZ blocks with higher increases, these are located around the communities of Ave Maria, Golden Gate, and Orangetree (west of Ave Maria), along with a few along the coast. The few small high growth areas for employment are also centered around the urban communities and along the existing transit network. Areas with high increases in employment numbers indicate potential for more transit demand as employment opportunity increases, generating more trips to get to these destination points.

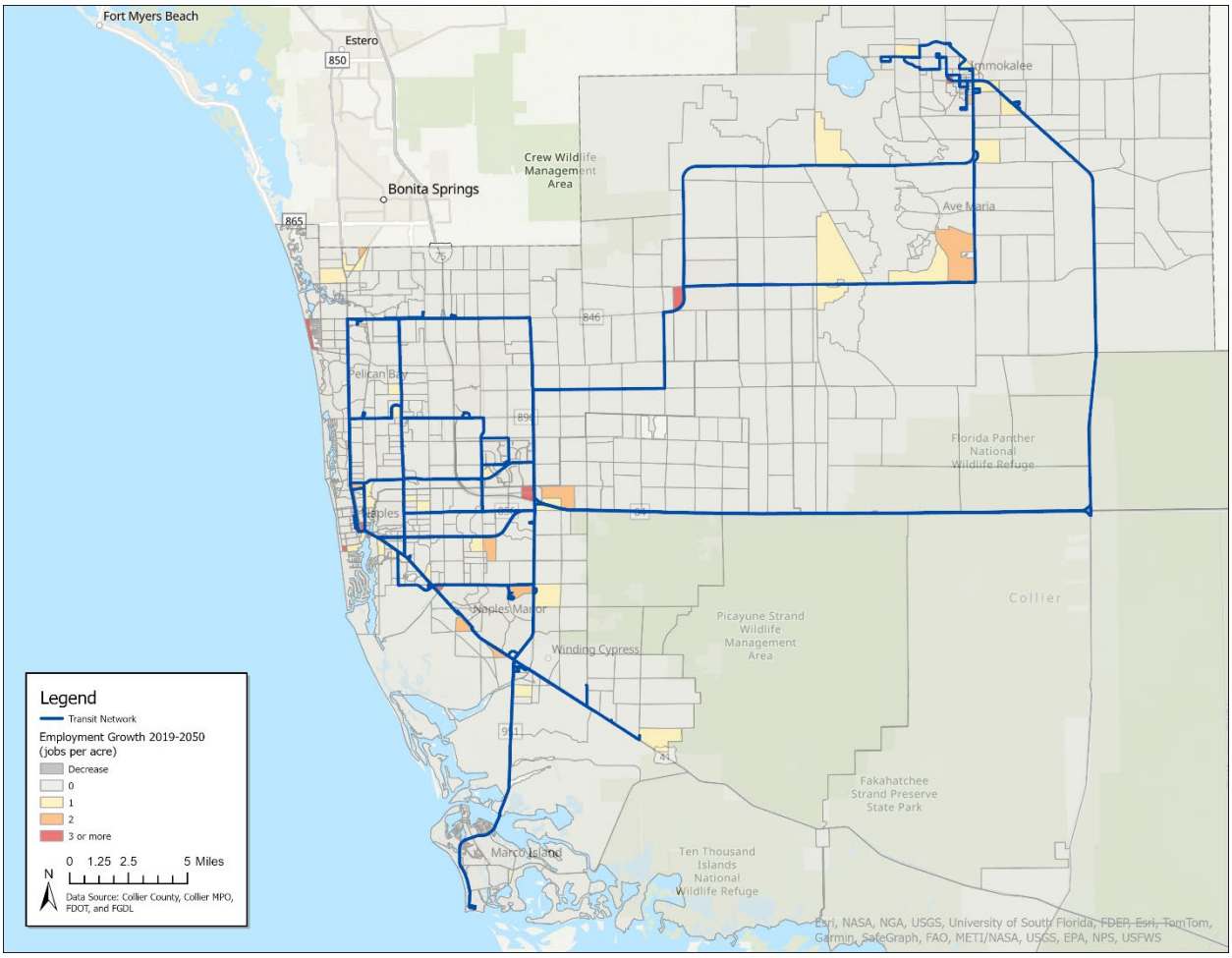


Figure 1-18: Collier County Employment Density Growth by TAZs from 2019 to 2050.

Figure 1-19 illustrates the distribution of employment across various sectors in Collier County in 2010, 2020 and 2022, offering insights into which sectors most influence the mobility requirements of the residents in before, during and after the COVID-19 pandemic.

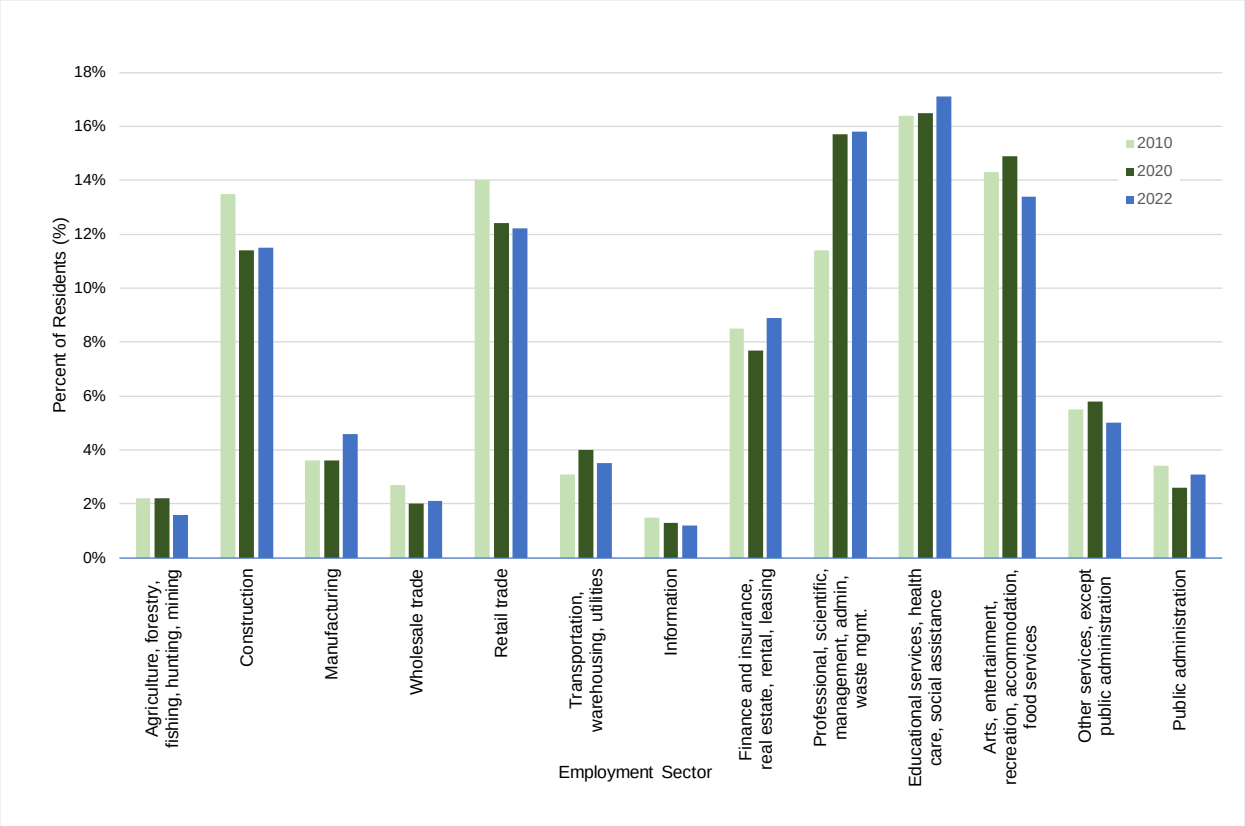


Figure 1-19: Collier County Labor Force Distribution by Service Area, 2010, 2020, and 2022.

Source: 2010 ACS 5-year estimates, 2020 ACS 5-year estimates 2022 ACS 5-year estimates.

As seen from Figure 1-19, the largest employment sectors in Collier County from 2010 to 2022 were the educational services, health care and social assistance sectors at around 16-17% of the workforce. Following closely are professional, scientific, management, administrative, waste management services and the arts, entertainment, recreation, accommodation, and food services sectors, each accounting for approximately 11-15% of the workforce. From Figure 1-11, a greater percent of the population earns more than $50,000. Thus, over time, more residents in Collier County can afford personal transportation, which may reduce their reliance on public transit. This observation also presents itself in *Table **1-1***; most of Collier's households own two or more cars. In contrast, sectors such as agriculture, forestry, fishing, hunting, mining, and transportation and warehousing, and utilities have experienced a downtick in their share of the workforce from 2010 to 2022. These types of jobs tend to have less employees working from home, leading to a lower reliance on personal vehicles or transit options in the County. Overall, the figure highlights the need for targeted transit solutions that cater to the unique needs of each employment sector, ensuring equitable access to mobility for all residents, regardless of income level.

Lee County is the primary location for Collier County residents working outside their home county. According to commuting patterns data are derived from the Census Bureau's LED LODES dataset, the highest number of net inbound commuters to Collier County in 2023 were from Lee County totaling to 7881 net inbound commuters. This highlights the extent to which the labor markets of the two counties are interconnected.

Figure 1-20 shows the unemployment rates in years ranging from 2010-2022 based on ACS 5-year estimates.

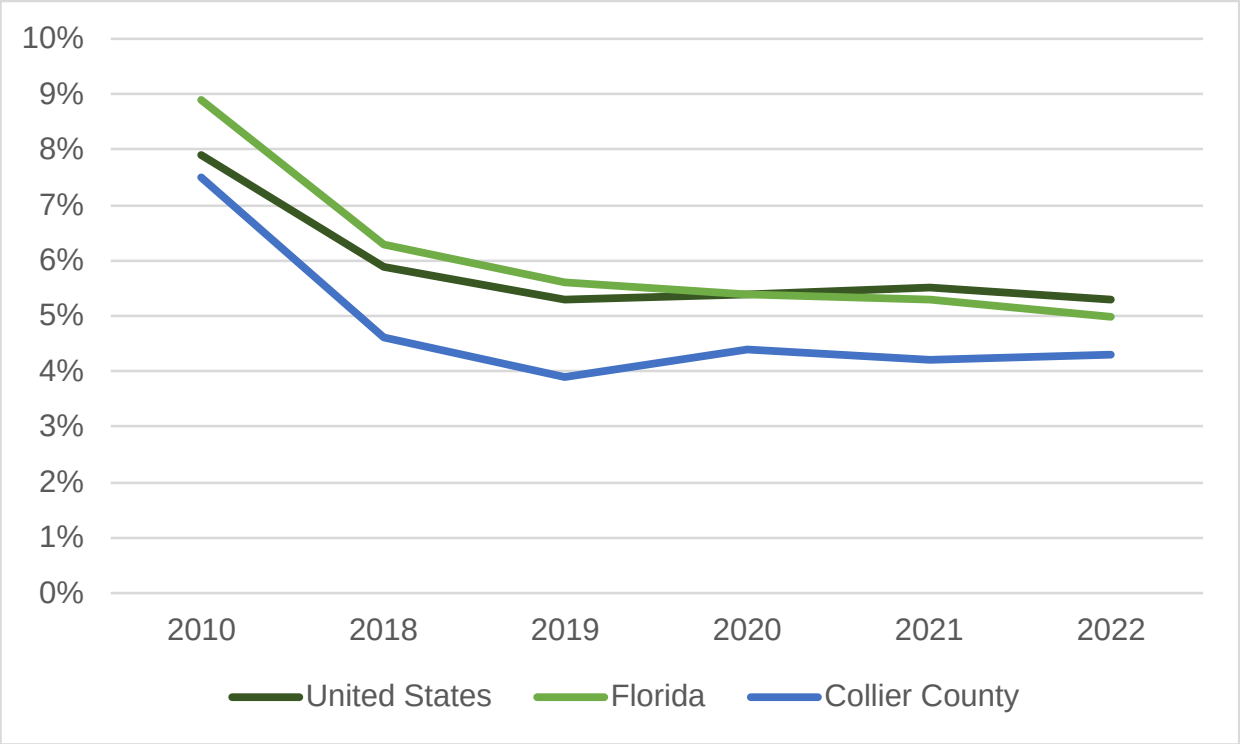


Figure 1-20: National, State and County Unemployment

In 2010, Collier County experienced higher unemployment rates. However, since then, there has been a consistent decline year by year. Collier County's unemployment rates consistently outperformed both national and state-wide averages. Even during the pandemic, when many regions faced economic challenges, Collier County maintained lower unemployment rates. Lower unemployment rates can correlate with economic recovery, as more people are employed of all income ranges engage in various activities. This increased economic activity can lead to higher public transportation usage.

1.6 Educational Attainment

Levels of educational attainment in the county can correlate with earnings potential and job security. This influences mobility need. Figure 1-21 shows the educational attainment of residents ages 25 years and older in Collier County.

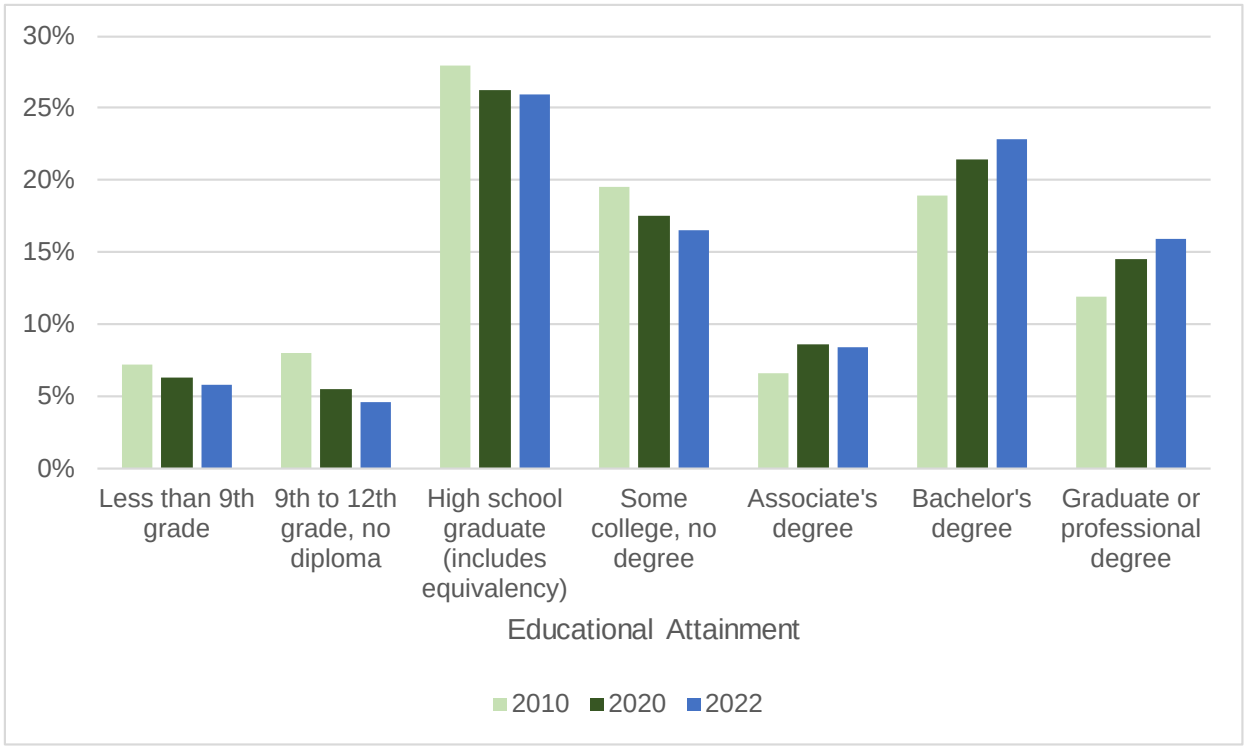


Figure 1-21: Educational Attainment in Collier County.

As seen from the Figure 1-21 above, more residents have obtained a bachelor's degree over time from 2010-2022. Despite this, while those obtaining bachelor's and graduate degrees are increasing in the County, approximately 30% of the population does not have a college degree which indicates around a third of the population with potentially lower potential earnings and an increased likelihood of requiring transit service.

1.7 Tourism

Tourism plays a vital role in shaping transportation needs and services within Collier County. Tourists arrive in Collier County year-round, but the peak season spans in the winter from October to April. There are two distinct groups of visitors: seasonal residents who live in Naples for more than 4 months (typically October - April) and those visiting the area as tourists. The Tourist Development Council (TDC) makes a distinction between these groups, as seasonal residents tend to own properties while vacationing visitors do not.

In most tourist destinations, tourists often rely on public transit, especially those accustomed to using it in their home communities and therefore tourists, combined with seasonal visitors and residents contribute to an overall increased transportation demand. According to the Collier County Tourist Development Council and Gulfshore Business, in 2023, through October, Collier County welcomed 2.3 million visitors, generating an economic impact of $3.01 billion (Roesler, 2023). This substantial economic impact underscores the importance of efficient transportation services.

Collier County boasts pristine beaches, attracting sun-seekers and water enthusiasts. Tourists may use various services such as the Breeze Beach Shuttles, bike routes, and bicycle rentals as first mile/last mile access to transit hubs. However, it's worth noting that tourism numbers have shown some fluctuations. For instance, in March 2023, Collier County experienced a 20% year-over-year decline in visitors compared to

March 2022. These fluctuations in visitor numbers can impact transportation needs and usage patterns throughout the year.

Figure 1-22 and *Figure **1-23*** show key tourist destinations by mapping major points of interests in Collier County in relation to transit line locations in the region. Attractive destinations include airports, beaches, museums, boating areas, and parks. While a grand majority of points of interest lie around the Naples region, there could be more extensive access to the beaches in Marco Island.

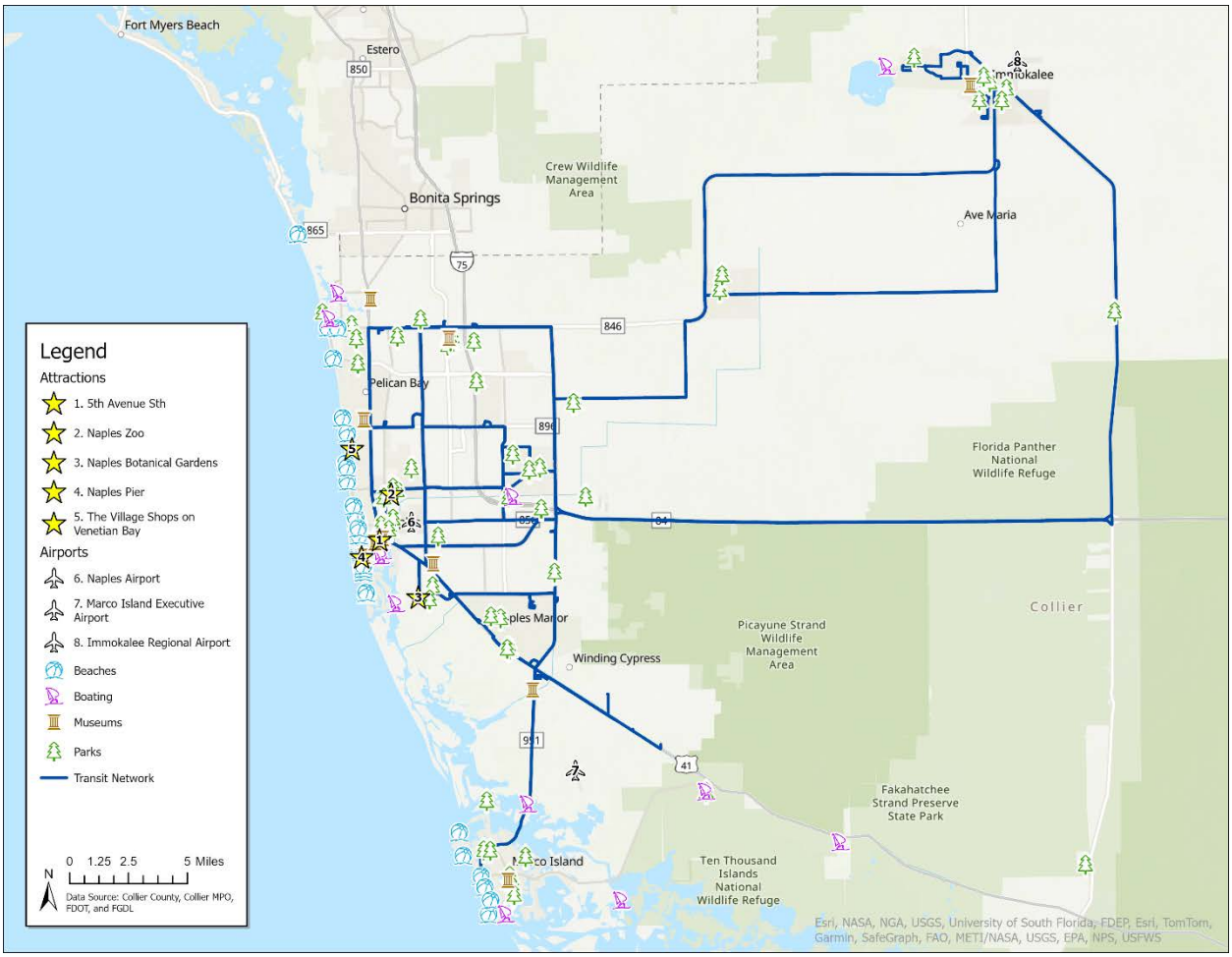


Figure 1-22: Transit Access to Point of Interest Destinations in Collier County.

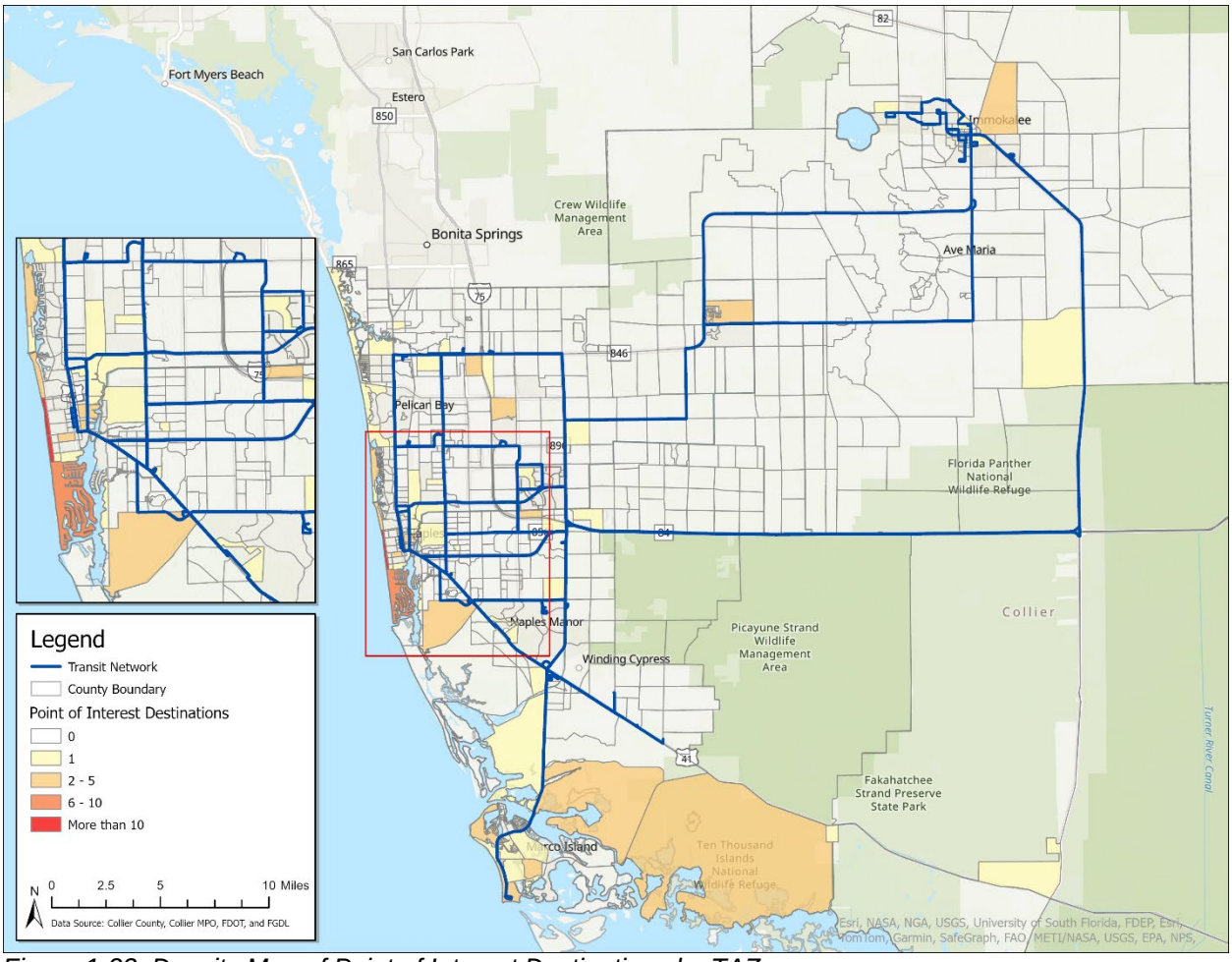


Figure 1-23: Density Map of Point of Interest Destinations by TAZ.

More recently, a study in June 2024 by Florida Gulf Coast University on Regional Economic Indicators (Southwest Florida Economic Outlook, Regional Economic Research Institute, FGCU, 2024) found that seasonally adjusted real tourist tax revenues for coastal counties were up 14% in March 2024 compared to March 2023. In addition, airport passenger activity also increased 12% from April 2023 to April 2024. This suggests that tourists are increasingly visiting Florida's coastal areas, like Collier, and spending more money, which likely reduces their propensity to use transit.

1.8 Major Trip Generators

Understanding the major trip generators within the county can help determine where to provide the most transit service. Table 1-3 displays the top employers in Collier County by the number of employees. The largest employers operate in the educational, government, and healthcare industries. Arthrex, Publix Supermarket, and Gargiulo are the three largest private sector employers in the county. On the other hand, some of Gargiulo's locations are in rural or industrial areas, lacking public transit access. The nearest stop to the location at Oil Well Road is one of Route 19's stops 2.72 miles away. Further, the closest bus stop to the Gargiulo packing house location in Immokalee is a Route 22 stop 1.63 miles away. Due to all Publix locations being near commercial centers, most, if not all, locations are accessible by transit. Similarly, most, if not all, public-school and local government buildings in the county are surrounded by residential or commercial hubs areas that have access to public transit stops. As development expands to accommodate

more housing and commercial demand (see Section 3.8), it will be necessary for CAT to consider expanding their public transit services.

Table 1-3: Top Employers in Collier County in 2023.

Employer	Number of Employees
Collier County Public Schools	5810
Collier County Local Government	5045
Arthrex	3983
NCH Healthcare System	3288
Publix Super Market	2935
Gargiulo	2082
Pacific Tomato Growers	872
Walmart	807
Marriott International, Inc.	669
Moorings Park	657
Downing-frye Realty Inc.	605
McDonald's	545
Vi at Bentley Village	494
Asg	447
David Lawrence Center	423
Philharmonic Center For The Arts	412
Naples Lake Country Club	402
Walgreens	389
Ave Maria School of Law	372
Heartland Health Care Center Ft Myers	372
Aa Stucco & Drywall Inc.	350
Home Depot	350
Seminole Casino Hotel Immokalee	350
CVS Pharmacy	349
Twineagles Pro Shop	333

Source: Regional Economic Research Institute at Florida Gulf Coast University (2023).

Figure 1-24 and Figure 1-25 show the distribution of top employer locations in Collier County and their distribution relative to existing transit lines. While most places of employment are accessible to transit, there exist many points of interest north of Pelican Bay and North or Immokalee which are further from a transit line. An extension of transit lines along Route 29 and 41 towards Everglades City would be important as well and increase commercial zones in that area.

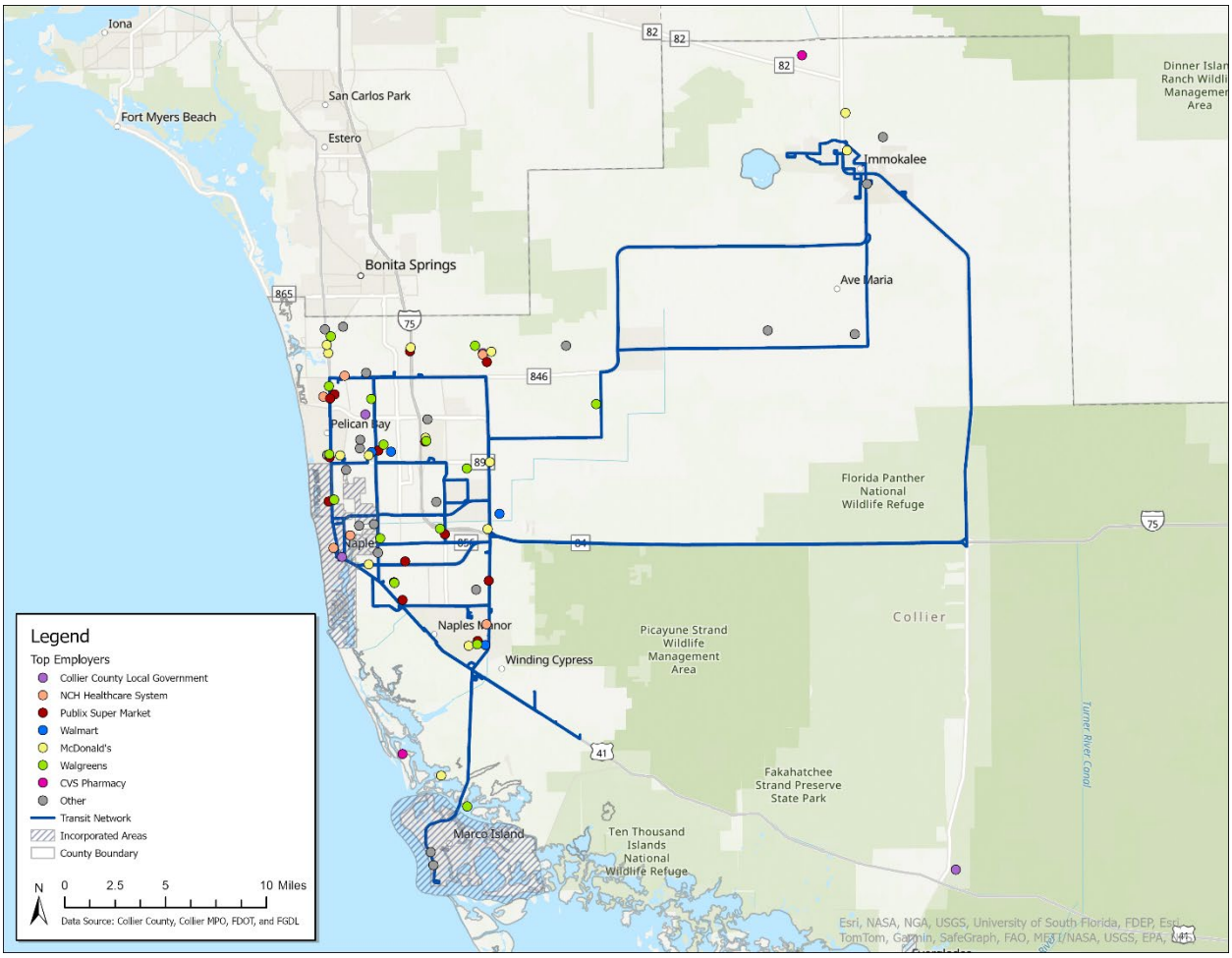


Figure 1-24: Transit Access to Top Employers in Collier County in 2023.

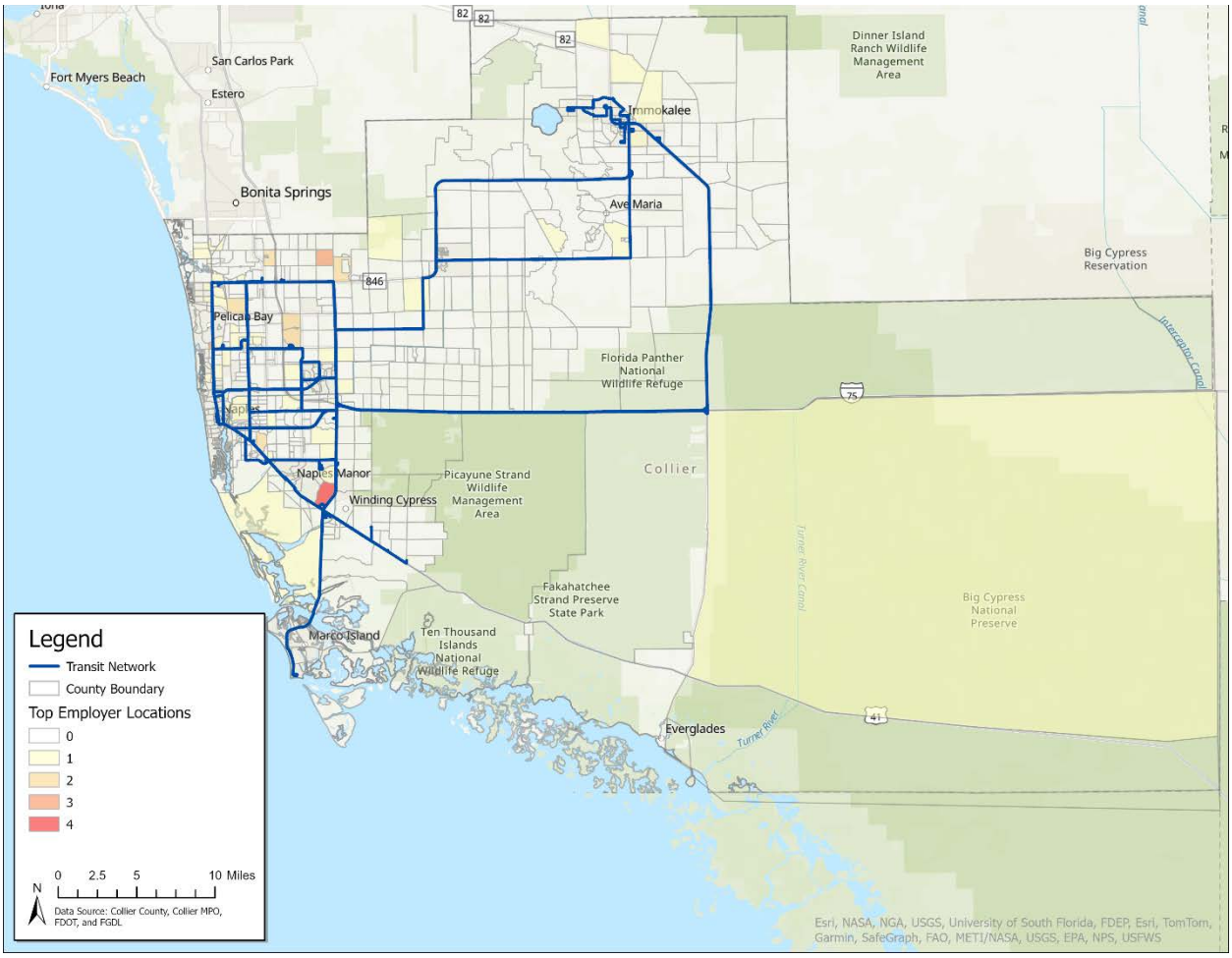


Figure 1-25: Density Map of Top Employer Locations by TAZ.

1.9 Major Developments

Table 1-4 shows the top 10 planned unit developments (PUDs) by acreage. Transit lines running adjacent to each proposed development are also outlined.

Table 1-4: Top Ten Planned Unit Developments in Collier County by Area.

Planned Unit Development	Acres	Transit
Town of Ave Maria SRA	5928	Routes 19/22/23
Marco Shores/Fiddler's Creek	4215	Routes 21/24/121
Lely Resort	2880	Routes 17/21/24/121
Heritage Bay	2562	Route 27
Sabal Bay	2518	Routes 13/14/24
Hacienda Lakes	2264	Routes 17/21/121
Pelican Marsh	2191	Routes 11/12/27
Orange Tree	2131	Routes 19/22
Pelican Bay	2114	Routes 11/25/29
Winding Cypress	1960	Routes 12/17/21/24/121

Source: Collier County GIS Hub.

Most of the proposed developments have transit services running adjacent to them. However, it's crucial to note that a significant portion of these developments are gated communities, which presents unique challenges for public transit access. Gated communities, which are prevalent in Collier County, often have restricted entry points and private roads that can limit direct access for public transit vehicles. Since most of these developments seek to expand residential areas, it will be important to ensure either an expansion of existing transit routes or the addition of new transit lines to serve these areas effectively. This may require innovative solutions to overcome the access limitations posed by gated communities.

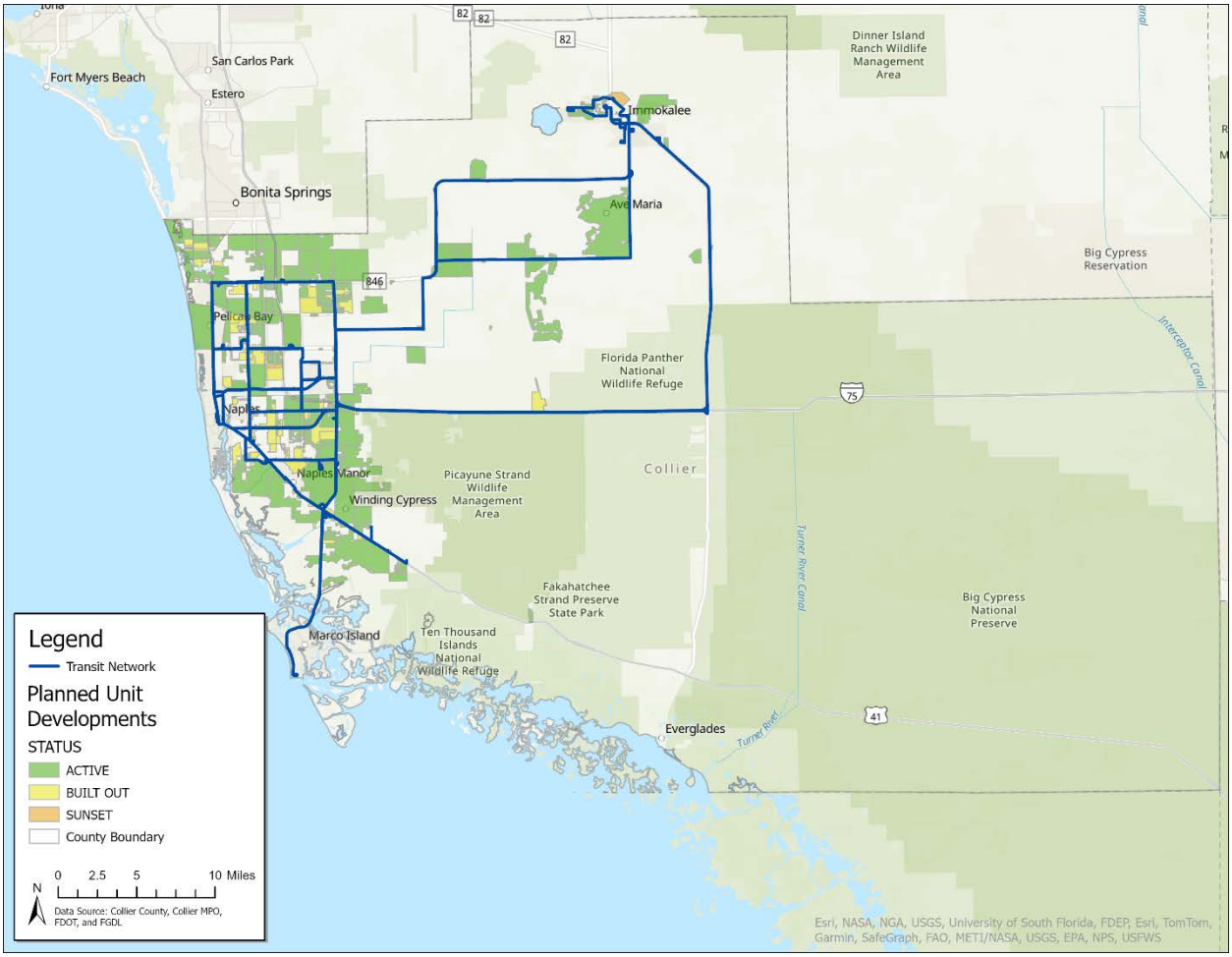


Figure 1-26: Status of Planned Unit Developments in Collier County.

Figure 1-26 shows the Developments of Regional Impact (DRIs) in Collier County as of May 3, 2024. These developments are noted for potential impacts to existing and future travel demand. The table shows which routes currently serve these developments in the existing CAT transit network as of May 3, 2024.

1.10 Existing and Future Land Use

With a fairly large land area, much of Collier County consists of agricultural land or park space. A significant portion of Collier County's land area is currently zoned for agriculture or open space (more than 90% all together; 38% and 54% respectively). About 5% of the land area is zoned for planned unit development (PUD), allowing for a significant amount of new or upcoming developments that would impact transit use and demand. The Naples and Marco Island are both zoned as incorporated areas. The land use varies

more in Immokalee and the urban communities surrounding Naples, including Palm River, Golden Gate, Fiddler's Creek and surrounding planned communities, and so on. Excluding agriculture, open space, PUD, and incorporated area zoning, these areas consist of 76% residential, 12% commercial, 9% industrial, and 3% civic and institutional zoned land.

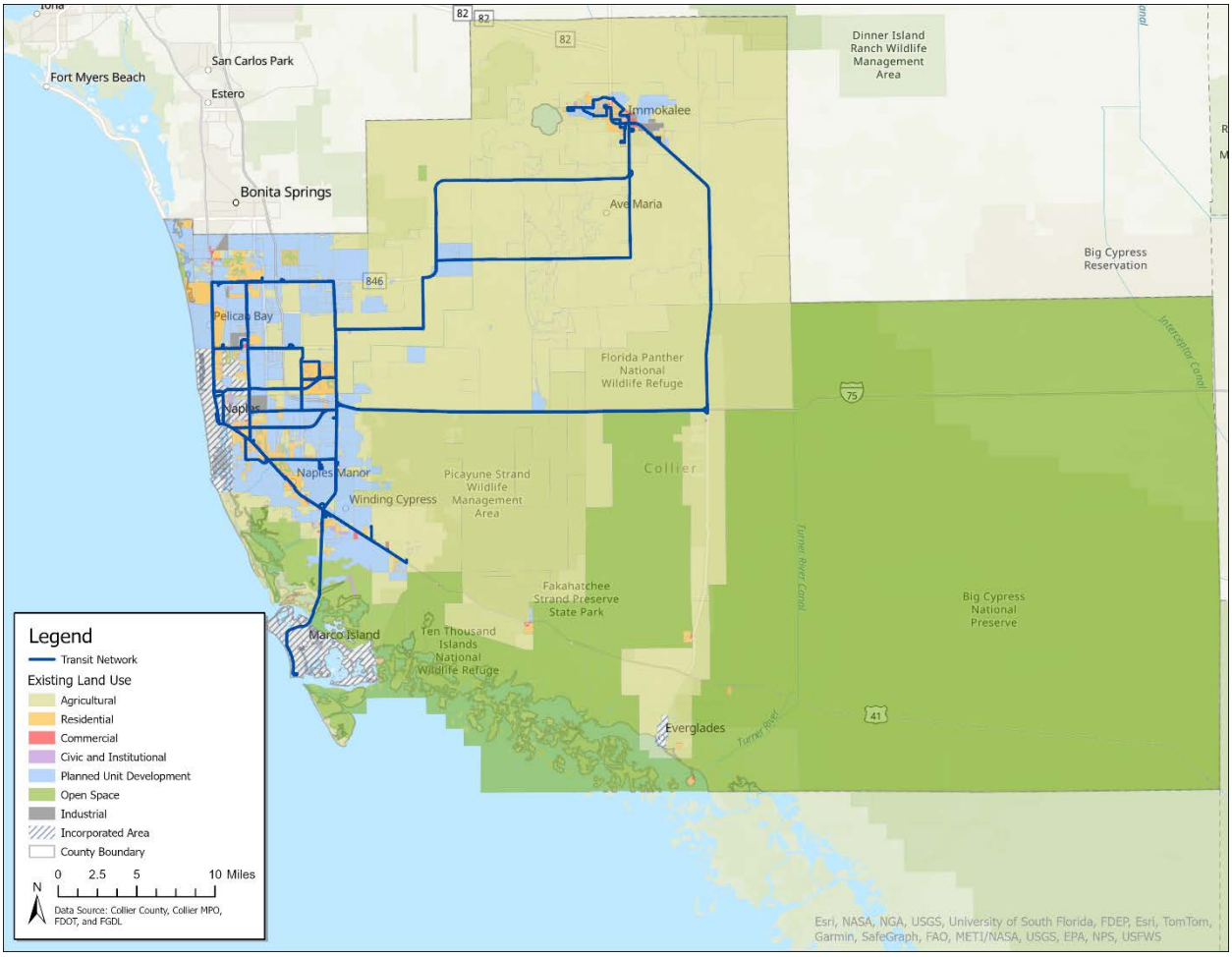


Figure 1-27: Existing Land Use Zoning Areas in Collier County.

As the County grows and develops, land use areas are redesignated consequently to accommodate for development needs and purposes. In the County's future land use designations, open space or conservation designation areas are expanding, specifically in the Big Cypress National Preserve as it now includes the Florida Panther National Wildlife Refuge where it was previously zoned as agricultural land. A notable amount of agricultural land has been rezoned as rural or estates designation, which is defined as low density residential development with limited agricultural activities. The PUD areas are zoned as urban residential land. The future land use designation also adds a new category of mixed-use activity in replacement of commercial and civic and institutional zoning.

A more detailed breakdown of future land use designations shows that conservation continues to occupy the largest portion (59%) of the County's acreage. It is still followed by agricultural/rural uses at 18%, but at a significantly smaller percentage compared to existing agricultural area. Estate designation and residential uses each constitute another 7% of the land. Noteworthy is the presence of sending and

receiving areas, comprising of 3% and 2% of the land respectively, which serve as mechanisms to steer development away from environmentally sensitive regions towards designated growth areas.

Although the predominant land use remains focused on conservation and agriculture, mixed-use zoning holds immense potential for fostering transit-oriented development. Transit planning should prioritize serving receiving areas, ensuring that transit infrastructure supports the anticipated influx of development in these zones. Meanwhile, transit routes passing through sending areas should aim to minimize ecological impact and focus on connecting these areas to transit hubs and receiving districts.

Residential areas present opportunities for creating walkable, mixed-income neighborhoods that are well-connected to transit services. Transit-oriented design principles should be integrated into the planning and development of these areas, emphasizing pedestrian-friendly streetscapes, mixed-use zoning, and access to public transportation. Additionally, transit routes serving these neighborhoods should offer frequent and reliable service, catering to the diverse needs of residents across different income levels and demographics.

Figure 1-28 and Table 1-5 depict future land use designation in Collier County as of 2024. The figure shows more generalized categories of land use. The table includes more detail including finer subcategories of land designations along with percentage breakdowns for each designation, sorted by acreage.

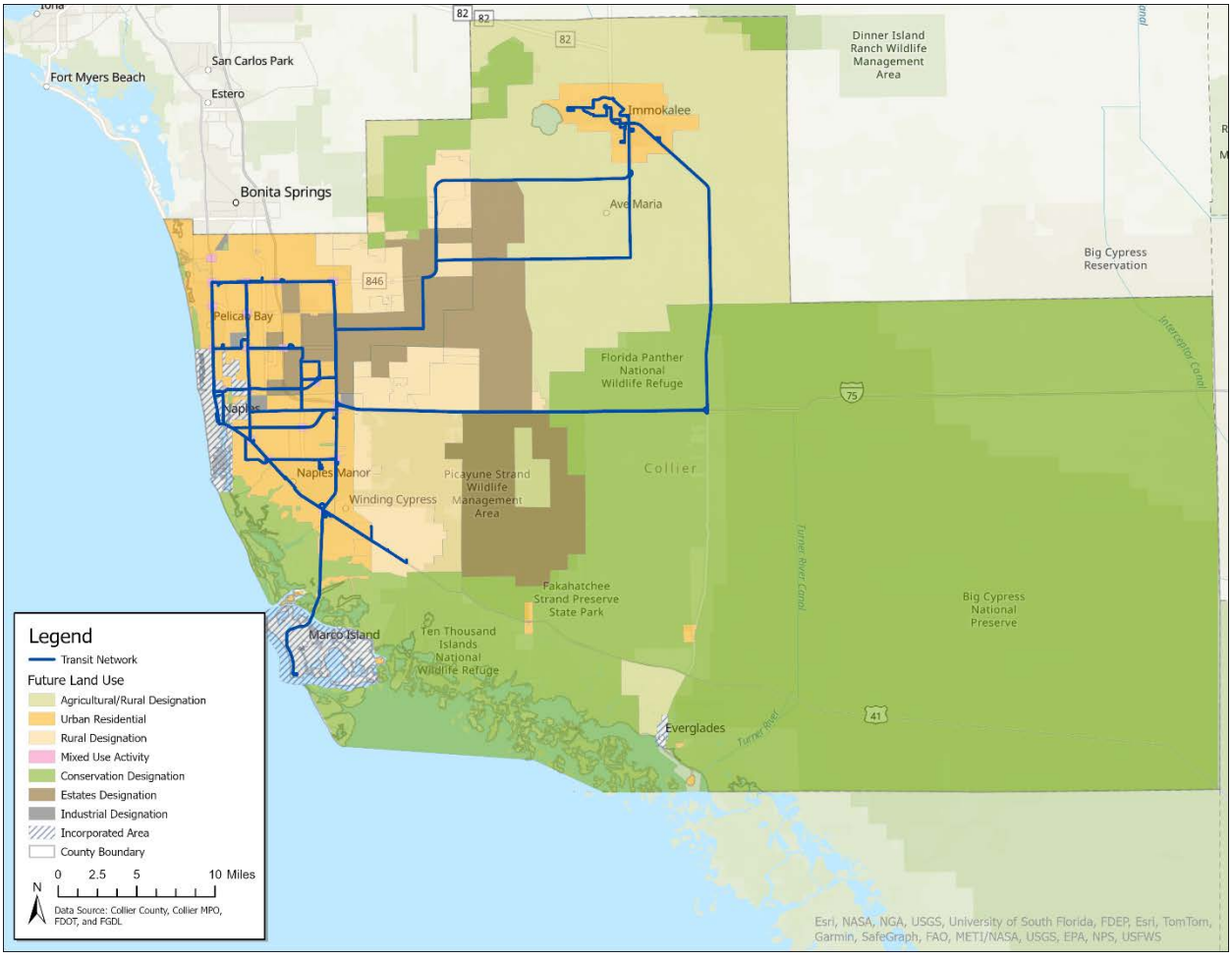


Figure 1-28: Future Land Use Designation in Collier County as of 2024.

Table 1-5: Future Land Use in Collier County.

Future Land Use	Acres	% of Area
Conservation	856,551	59%
Agricultural/Rural	257,645	18%
Estates Designation	101,302	7%
Residential Uses	95,936	7%
RF-Sending	44,843	3%
Incorporated Area	25,941	2%
RF-Receiving	22,672	2%
Urban Coastal Fringe Subdistrict	11,775	1%
RF-Neutral	8,836	1%
Mixed Use	3,079	<1%
Rural Settlement Area District	2,824	<1%
Immokalee Road Rural Village Overlay	2,778	<1%
Industrial District/Rural Industrial District	1,839	<1%
US 41 East Overlay	1,526	<1%
Bayshore/Gateway Triangel Redevelopment	1,190	<1%
Interchange Activity Center Subdistrict	454	<1%
Commercial	249	<1%
Livingston Rd/Veterans Memorial Blvd E Resi Subdistrict	36	<1%
Carman Drive Subdistrict	15	<1%
Orange Blossom/Airport Crossroads Comm'l Subdistrict	10	<1%
Corkscrew Island Neighborhood Coml Subdistrict	9	<1%
Ivy Medical Center Subdistrict	4	<1%
Total	**1,440,427**	**100%**

Source: Collier County GIS Hub.

1.11 Commuter Travel Patterns

Understanding mode choices of commuters is essential to understanding the frequency and need of transit options in Collier County. In Table 1-6, journey-to-work characteristics and commuter flow patterns were compiled based on Census data for residents 16 years or older.

Table 1-6: Journey-to-Work Characteristics.

Characteristic	2010	2020	2022
Place of Work			
Worked inside county	89.5%	89.3%	89.3%
Worked outside county	8.1%	8.4%	8.3%
Mode to Work			
Drive alone	75.3%	74.0%	74.0%
Carpool	12.3%	12.0%	10.9%
Public transit	1.6%	1.1%	0.5%
Walk	1.2%	1.1%	0.7%
Work at home	6.1%	9.4%	11.7%
Taxicab, motorcycle, or other means	2.5%	1.7%	1.7%
Travel Time to Work			
<10 minutes	11.6%	10.6%	10.0%
10-19 minutes	33.1%	29.7%	29.1%
20-29 minutes	24.2%	24.7%	24.9%
30-44 minutes	18.9%	22.2%	22.8%
45+ minutes	12.2%	12.8%	13.2%
Departure Time to Work			
6:00-8:59 AM	67.8%	65.9%	64.8%
Other times	32.2%	34.1%	35.2%

Source: 2010 5-year estimates, 2018 5-year estimates, 2022 5-year estimates.

As shown in Table 1-6, more people work inside the county. As time passes, less people use public transit or walk and more work at home. A consistent percentage of people drive alone (74-75%). Travel times to work remain consistent, although longer commute times are steadily increasing. Finally, a consistent number of residents (around 65-67%) leave for work between 6AM-8:59AM.

1.12 Roadway Conditions

2 Transit Performance

This section evaluates transit services in Collier County, including an overview of current services, trend analysis, and peer comparison. It examines existing transit operations, infrastructure, and other key providers. Additionally, it reviews performance trends over the past five years and compares CAT service with peers using standard criteria.

2.1 Existing Transit Services

2.1.1 FIXED ROUTE SERVICES

As of 2024, Collier Area Transit (CAT) operates 16 existing fixed bus routes services that operate throughout Collier County. CAT's service area largely consists of the urbanized part of Collier County, including the City of Naples and the City of Marco Island. Unincorporated rural communities in the County that receive transit service include Ave Maria and Immokalee. Service is provided 7 days a week, all year round except for 6 holidays. Daily service typically begins between 5:30 AM and 6:00 AM and ends later in the evening between 7:30 PM and 8:00 PM for most routes. No services are provided on major holidays, including on Thanksgiving Day, Christmas Day, New Year's Day, Memorial Day, Independence Day, and Labor Day. In 2023, the service's annual ridership was 729,767. CAT's services also include Route 600, also known as the LinC Lee-Collier which connects transit lines in Leeside County and Collier County. Route 600 is interlined with LeeTran's Route 240 and connects to LeeTran's Route 140. *Table **2-1*** shows the existing transit lines in Collier County as of 2024.

Table 2-1: Existing Fixed-Route Services in Collier County.

Count	Route	Services
1	11	US 41 to Creekside Commerce Park
2	12	Airport to Creekside Commerce Park
3	13	NCH & Coastland Center Mall
4	14	Bayshore to Coastland Center Mall
5	15	Golden Gate City (Santa Barbara)
6	16	Golden Gate City (Santa Barbara)
7	17	Rattlesnake to FSW
8	19	Golden Gate Estates & Immokalee
9	20	Pine Ridge Road
10	21	Marco Island Circulator
11	121	Express Immokalee to Marco Island
12	22	Immokalee Circulator
13	23	Immokalee Circulator
14	24	US 41 East to Charlee Estates
15	25	Golden Gate Parkway & Goodlette - Frank
16	27	Immokalee Road

Source: CAT Website.

In addition to fixed-route services, CAT operates the Paradise Beach Trolley. This service runs every Friday, Saturday, and Sunday from mid-February to the end of April. It shuttles passengers from the Conner Park Parking Lot on Bluebill Avenue to Delnor-Wiggins Pass State Park and Vanderbilt Beach, operating from 8 am to 3 pm and from 4:30 pm to 7 pm. Figure 2-1 shows a map with the current transit routes in Collier County as of 2024.

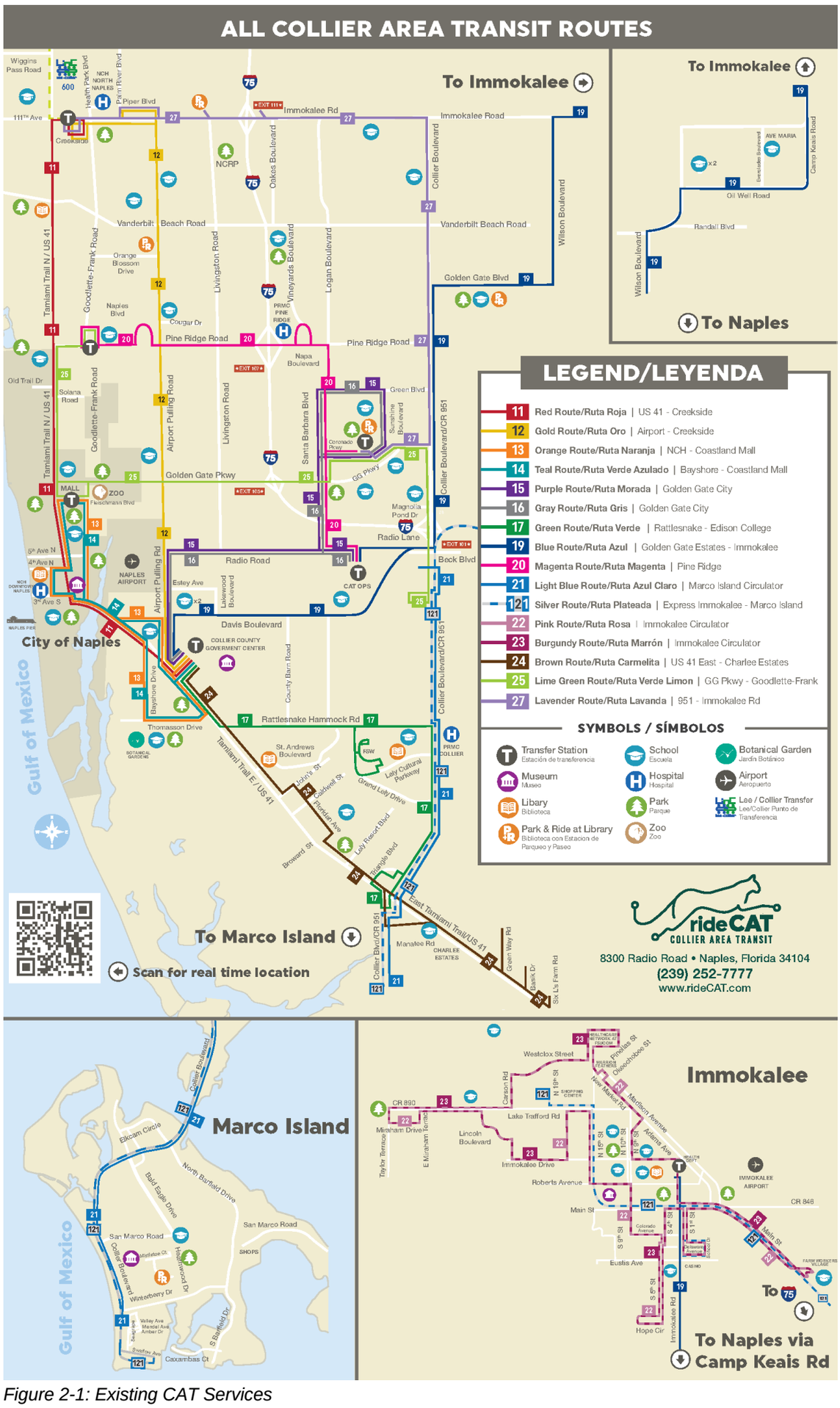


Figure 2-1: Existing CAT Services

There are currently four park-and-ride locations around Colier county. They are free to park in and operate from 5 A.M. to 9 P.M. on all days of the week, however, overnight parking is prohibited. Table 2-2 below lists the four park-and-ride locations along with the address of the lot, the number of parking spots provided, the nearest bus stop number, and connecting bus routes. Figure 2-2 depicts a map of the park-and-ride locations along with the CAT transit system.

Table 2-2: Park-and-ride locations and connections.

Name	Address	# of Parking Spots	Nearest Stop	Connecting Routes
Livingston Park and Ride	Livingston Rd/Immokalee Rd	20	682	27
Park and Ride at Orange Blossom Library	2385 Orange Blossom Dr	5	101	12
Park and Ride at Golden Gate Public Library	2432 Lucerne Rd	5	564	15, 16, 20, 25, 27
Park and Ride at Estates Library	1266 Golden Gate Blvd W	5	278	19

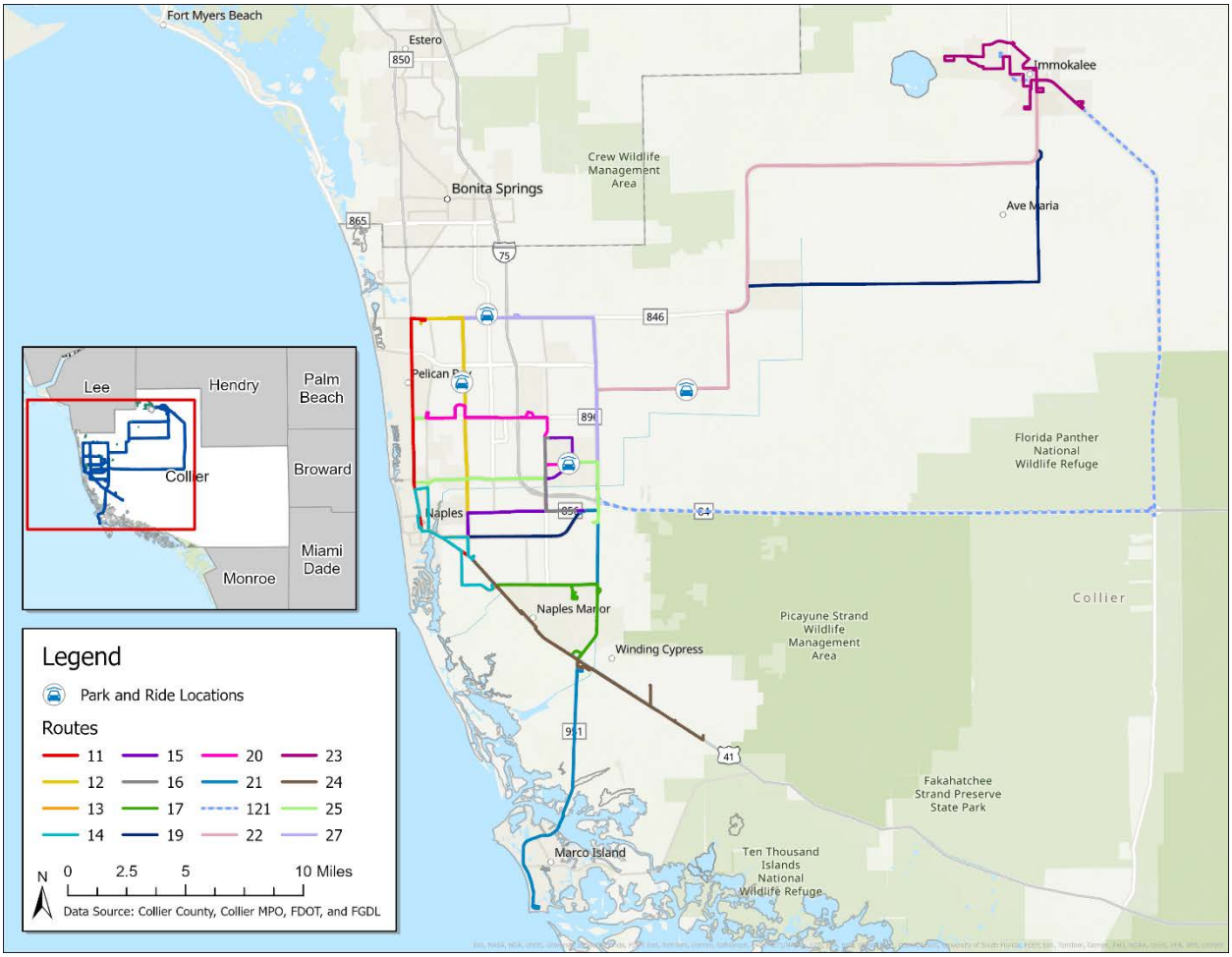


Figure 2-2: Map of park-and-ride locations in Collier County with the CAT transit system.

2.1.2 PARATRANSIT SERVICES

Collier County also provides paratransit (shared ride, door-to-door) services through the CATConnect program with funding from the Florida Department of Transportation, Agency for Persons with Disabilities and Florida Commission for the Transportation Disadvantaged (TD). Those who qualify for CATConnect are primarily those under the Americans with Disabilities Act (ADA) as well as those who qualify as TD individuals. TD individuals are counted as those who because of a mental or physical disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to healthcare, employment, education, shopping, social activities, or other life-sustaining activities.

The CATConnect paratransit service is administered by Collier County Public Transit & Neighborhood Enhancement (PTNE) Division and provides shared, door to door transportation service for medical appointments, work, school and select other trips depending on the funding program requirements.

In the June 2024 CATConnect Paratransit Service Report, it was found that paratransit ridership was on an increasing trend, with a significant increase from 2022 to 2023 of 35.8%, see Figure 2-3. Collier County overall has 7% fewer vehicles that peer systems but higher passengers per trip compared to peer agencies.

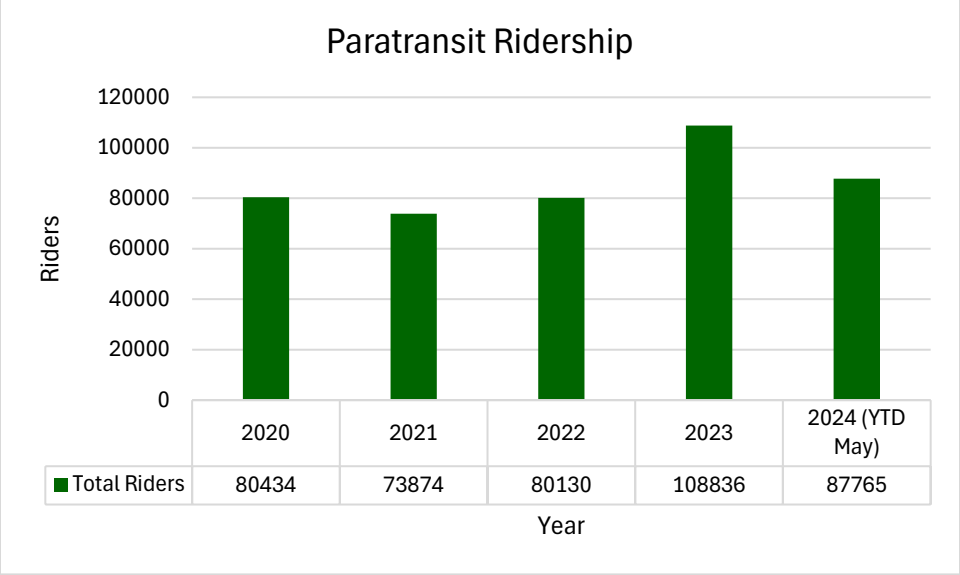


Figure 2-3: Paratransit Ridership

2.1.3 TECHNOLOGY SOLUTIONS

Collier County has several existing technology solutions and goals that will help the County prosper in the next 10 years.

2.1.3.1 IT Infrastructure and Management

Collier Area Transit (CAT) has a dedicated IT department responsible for managing both the physical and digital infrastructure of its transit services. This includes software development, maintenance, and ensuring data privacy and security.

2.1.3.2 Transit Development Plan and Mobility Initiatives

The 10-year Transit Development Plan identifies mobility-on-demand services as a top priority. In line with this, CAT upgraded to Ecolane scheduling software in July 2021, replacing RouteMatch for paratransit services. This upgrade streamlined scheduling, dispatching, and real-time updates, significantly improving efficiency and service reliability.

2.1.3.3 Passenger Convenience and Mobile App Integration

In March 2022, CAT launched the CATconnect Mobile App. The app allows passengers to schedule, monitor, and manage trips seamlessly. Integrated with the CATCash fare system, it provides an account-based payment option that eliminates the need for cash transactions. The app also offers trip details and past journey records for user convenience.

Collier County also offers the Collier 311 App, which connects users to a variety of government services and information, including construction updates, waste services, and service requests.

2.1.3.4 Exploring Sustainable Transportation

In response to evolving demands, CAT is exploring the introduction of electric shuttles as a greener alternative to traditional buses. Additionally, CAT is considering ride-share-style services in specific areas to improve flexibility and accessibility.

2.1.3.5 Infrastructure Enhancements and Data Integration

Collier County's express lanes present an opportunity for conversion into BRT routes. The County's Transportation Management Services Department is key in planning and enhancing this infrastructure, working alongside the dedicated planning team to drive technological innovation.

CAT also maintains both static and real-time General Transit Feed Specification (GTFS) data, feeding into the Transit App service. Ongoing upgrades to CAD/AVL systems, Mobile Data Terminals (MDTs), Automatic Voice Annunciation (AVA) systems, and Automated Passenger Counters (APCs) are part of CAT's commitment to providing accurate data and seamless passenger experiences. These systems are integrated with the Mobile Ticketing Platform, powered by Masabi, and aligned with ITxPT standards to ensure a unified, efficient transit experience.

2.1.4 FARE STRUCTURE

As of 2024, CAT uses TripSpark fareboxes on all their transit vehicles which accept cash, reloadable smartcards, and paper transfer tickets. Mobile tickets for CAT buses can also be purchased on the RideCAT mobile application or Transit App. In the future, they will be working with LECIP fareboxes.

The fare structure as of 2024 is presented in Table 2-3.

Table 2-3: Fare Structure in Collier County (2024)

Fare Category	Fare	Reduced Fare
One-Way	$2.00	$1.00
Children 5 years of age and younger	Free	Free
Marco Express	$3.00	$1.50
Transfers – up to 90 minutes	Free	Free
Day Passes	$3.00	$1.50
Smart Card Pass		
15-Day Pass	$20.00	$10.00
30-Day Pass	$40.00	$20.00
Marco Express 30-Day Pass	$70.00	$35.00
Discounted Pass		
Summer Paw Pass (Valid June 1 – August 31 for students. Price includes Smart Card)	$30.00	
30-Day Corporate/Perk Pass (300+ Employees)	$29.75	
Smart Card Media Fees		
Smart Card	$2.00	
Registration	$3.00	
Replacement with Registration	$1.00	

Source: rideCAT website; Collier County

The Reduced Fares are for members of Medicare, Disabled Community, those 65 years and older, children 17 and under, high school and college students and active / retired military personnel. ID is required. This fare would also apply to the subcontracted transportation provider with the Florida Commission for the Transportation Disadvantaged that provides transportation services under the non-emergency transportation Medicaid Contract for Collier County. Discount Passes are for persons eligible under the identified programs.

2.1.5 TRANSIT FACILITIES

There are currently two passenger transfer stations and five passenger transfer points provided on the CAT system. The first transfer station located at the Mobi Transfer Station also known as the Radio Road Transfer Station which is located at 8300 Radio Road in Naples as shown in **Error! Reference source not found.**. This building is also a facility for the CAT Connect Paratransit program. At this facility, bus operations and bus transfers occur.



Figure 2-4: CAT Radio Road Transit Facility (Source: Google Street View)

The second passenger transfer station operated by CAT is the Government Center Transfer Station located at 3355 Tamiami Trail in East Naples, as shown in Figure 2-5 below, which accommodates pedestrians, cyclists, and "kiss-and-ride" passengers that are briefly either picked up or dropped off. This location provides in-person customer service, schedules, and pass sales, and is served by routes 11-17, 19, 22, and 24. Although parking is free, it is not an official park-and-ride site. The facility includes a busway with a turn-around, six sawtooth bus berths, a passenger platform with benches and trash receptacles, restrooms, snack machines, an air-conditioned lobby, and a customer service area with an informational kiosk.



Figure 2-5: Intermodal Transfer Station (Source: Google Street View)

Collier County plans to build a third transfer facility in the Immokalee Community on a vacant parcel owned by the county, with the plans currently underway and scheduled for completion in the fall of 2024. The

proposed site, approximately 1.7 acres in size, is currently a grass field adjacent to a green wooded area. It features an asphalt/concrete driveway providing access to the Health Department and a maintenance shed. The bus transfer station will enhance passenger and transit efficiency with new bus bays, canopy-covered shelters for passengers, a waiting platform with benches and trash receptacles, vending machines or options for food trucks, restroom facilities for passengers and drivers, and ADA improvements. Currently, passengers transferring at this location use a shelter located in a parking lot shared by visitors to the Health Department, County Library, and the David Lawrence Center.

Other transfer point locations within Collier County include Walmart Plaza; Pine Ridge and Goodlette-Frank Rd (Magnolia Square Plaza); Coastland Center; Creekside (Immokalee Road); and the Health Department in Immokalee. CAT also has dedicated parking spaces at the Orange Blossom Library, Golden Gate Parkway Library, Golden Gate Estates Library, Marco Island Library, and Immokalee Library.

In addition, the 2020 Park and Ride Study identified and prioritized sites for potential park and ride facilities. These facilities are designed to provide areas where commuters can park and access public transit, carpools, or vanpools, helping to address traffic congestion and parking constraints. The locations of these areas include Creekside, the Government Campus, Coastland Center Mall, Freedom Square, Physicians regional, the Golf Course near VA Hospital, Immokalee Health Department, Beach Lot at Pine Ridge Road, and Radio Road Transfer.

2.1.6 VEHICLE INVENTORY

Table 2-4 below provides a summary of the 74-vehicle fleet at CAT, with a breakdown by make and model and some key statistics. These 74 vehicles include those used for fixed-route public transit services, paratransit services and support vehicles. The fixed route fleet increased by 17% from 2013 when there were 29 vehicles, compared to 34 currently. It is understood that even with this fleet size expansion, CAT still currently struggles to provide the services required, which is likely due to the large service area that the agency serves.

The age of the fleet generally can be considered quite near end of life, with the average expected date of retirement only 2 years away in 2026 with many already being beyond their expected retirement age.

Table 2-4: CAT Vehicle Inventory 2024

Make	Model	Vehicle Type	Number of vehicles	Average Miles/Yr	Average Cost	Average % Federal funding	Average Expected Date of Retirement
CHEVROLET			**5**	**42,893**	**$105,141**	**80%**	**2021**
	Glaval	D	5	42,893	$105,141	80%	2021
FORD			**33**	**47,160**	**$77,985**	**81%**	**2026**
	Challenger	D	15	51,191	$79,663	75%	2025
	Escape	F	1	6,543	$23,170	100%	2031
	F-150 XL	G	1	28,897	$21,888	100%	2029
	F-150 XLT	G	1	22,859	$26,200	92%	2028
	Glaval	D	4	58,034	$83,093	80%	2023
	Impulse	D	6	66,666	$82,161	80%	2026

	Taurus SEL	F	1	6,080	$26,667	73%	2029
	Transit	F	2	24,053	$22,874	100%	2030
	Villager 7.3L V8	C	2	21,902	$204,781	100%	2032
FREIGHTLINER			**1**	**25,265**	**$138,632**	**90%**	**2028**
	Legacy	C	1	25,265	$138,632	90%	2028
GILLIG			**31**	**63,453**	**$433,013**	**98%**	**2028**
	G27B102N4	A	10	69,016	$393,761	98%	2026
	G27D102N4	A	3	84,276	$410,091	98%	2026
	G27E102H2	A	4	24,542	$476,193	100%	2035
	G27E102N2	A	12	68,768	$440,861	96%	2031
	G30B102N4	A	2	50,336	$530,207	100%	2022
VPG			**4**	**18,749**	**$50,173**	**80%**	**2020**
	MV1	F	4	18,749	$50,173	80%	2020
Total System			**74**	**51,866**	**$227,864**	**88%**	**2026**

(Source: Collier Area Transit Vehicle Inventory Report-1st Half February 2024)

2.1.7 SAFETY

There isn't much discussion of the safety and security in any of these documents. It's a required expenditure under the FTA grants. Annually 5307 grants must commit 1% of their federal allocation to safety and security improvements.

2.2 Other Transportation Service Providers

Although the LinC bus route provides commuter service between the Collier and Lee counties by connecting riders to local bus service in both counties, there is a lack of regional public transportation that provides intercity commuter service. Services offered by private intercity bus companies, including Greyhound, RedCoach, and FlixBus, help to bridge the gaps in terms of regional connectivity to destinations further afield. These private transportation services can both complement and/or compete with public transportation services.

The private bus companies in Collier as listed above provide transportation services with connections to major cities in Florida. They typically provide direct service to Fort Myers, Sarasota, Tampa, Fort Lauderdale, Miami, and so on, as well as further cities such as Orlando and Tallahassee. The station stop for all Greyhound, RedCoach, and Flixbus services is located at 8845 Davis Boulevard. It is accessible by CAT route 19 as shown in Figure 2-6.

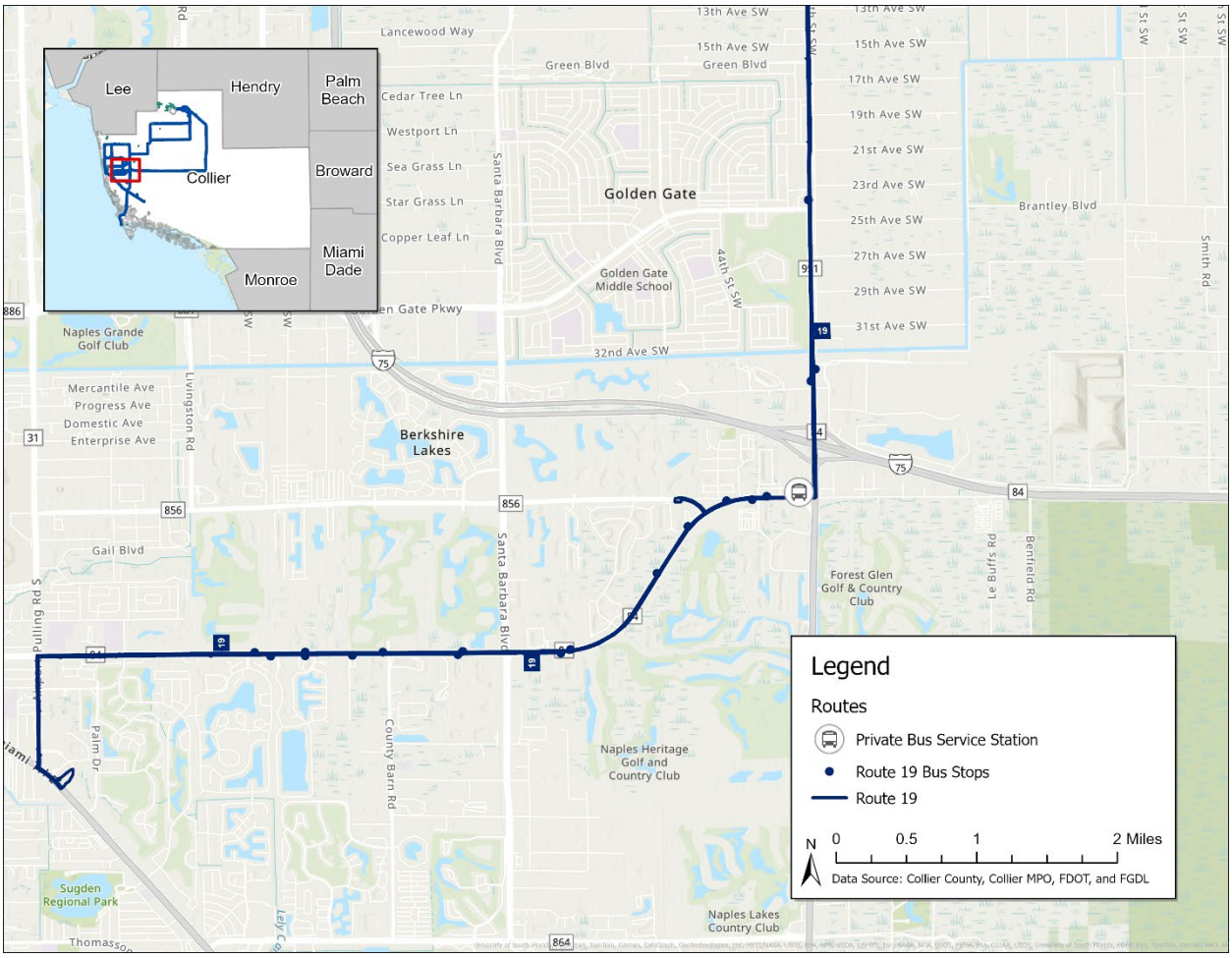


Figure 2-6: Station location for private bus service and Park and Ride locations along transit network.

2.3 Comprehensive Operations Analysis 2021 - Recap

The purpose of a Comprehensive Operations Analysis (COA) is to review the transit network and assess how best the agency can improve services and efficiency, particularly in relation to day-to-day operations. This assists with increasing value for the agency and ensuring that the transit system is as effective and efficiency as possible in the shorter term. Generally, the COA is thought of as feeding into the TDP where the TDP sets the longer-term strategic goals and identifies the needs help the transit system grow, evolve and improve overtime.

The COA conducted in 2021 analyses the fine details of the transit operations, assessing elements such as service enhancements and optimization. This can include repurposing routes, moving service from less productive areas and routes, and enhancing well performing routes.

The key takeaways in relation to route optimization from the extensive analysis undertaken in the COA that have been implemented to date are summarized below. The recommendations that were implemented were the ones that were deemed to be cost neutral:

- Elimination of Route 12B – low productivity and requires additional bus.

- Route 17 and 18 which followed similar alignments were consolidated into the current Route 17.
- Re-alignment of Route 19 - Maintain service on Collier Boulevard and Immokalee Road with select trips to Ave Maria via Oil Well Road.
- Route 21 alignment changes – maintaining service on Collier Boulevard between Marco Island and Walmart but removing service on San Marco Road. Additionally consolidated with Route 28.
- Route 25 alignment changes – A low ridership route moved to travel on US41 between Pine Ridge Road and Golden Gate Parkway. Removing service on Collier Boulevard and Goodlette Frank Road.
- Removal of Route 28 – consolidating Route 28 with Route 19.
- Route consolidation of 20 and 26. Routes 20 and 26 were the two lowest performing routes in terms of trips per revenue hour. By combining, all day service can be provided at 90minute frequency.

2.4 Transit Usage

2.4.1 ROUTE RIDERSHIP BY MONTH

Trends for the FY2020-FY2023 years are assessed in this section. Only routes active in 2024 are displayed in the graphs below. Ridership per month from the most recent full financial year is presented below in Figure 2-7 below.

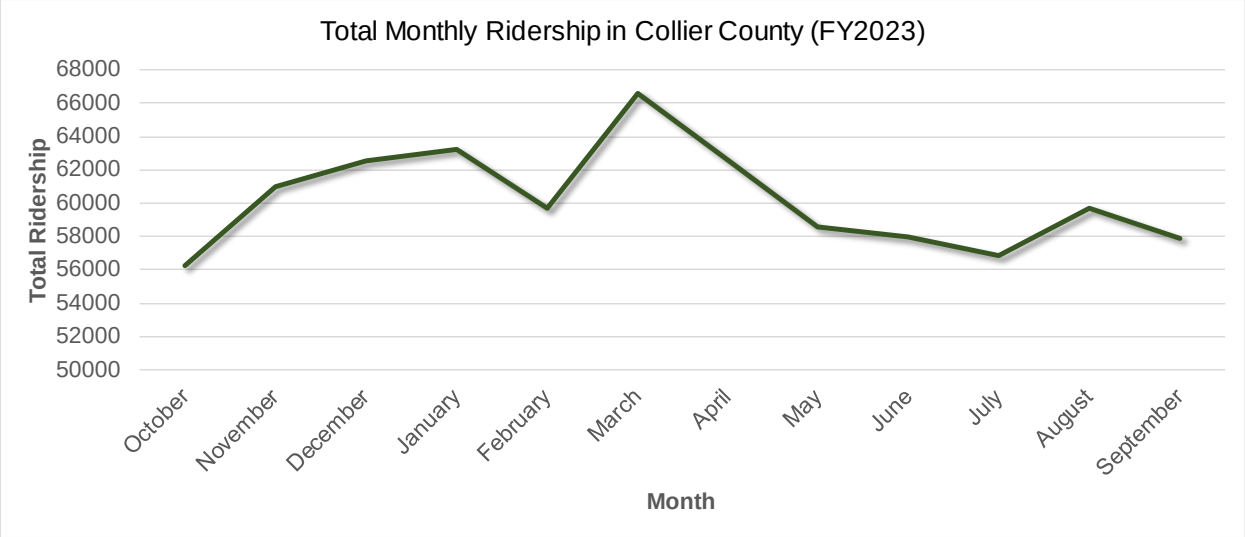


Figure 2-7: Total Monthly Ridership in Collier County during FY2023

As seen from the graph above, total ridership peaks in the holiday season (December-January) and March. Ridership then dips starting in May as the peak tourist and visitor season declines. This trend could indicate that more tourists are populating the buses during the peak seasons.

Figure 2-8 displays the total ridership for each route throughout the 2023 fiscal year.

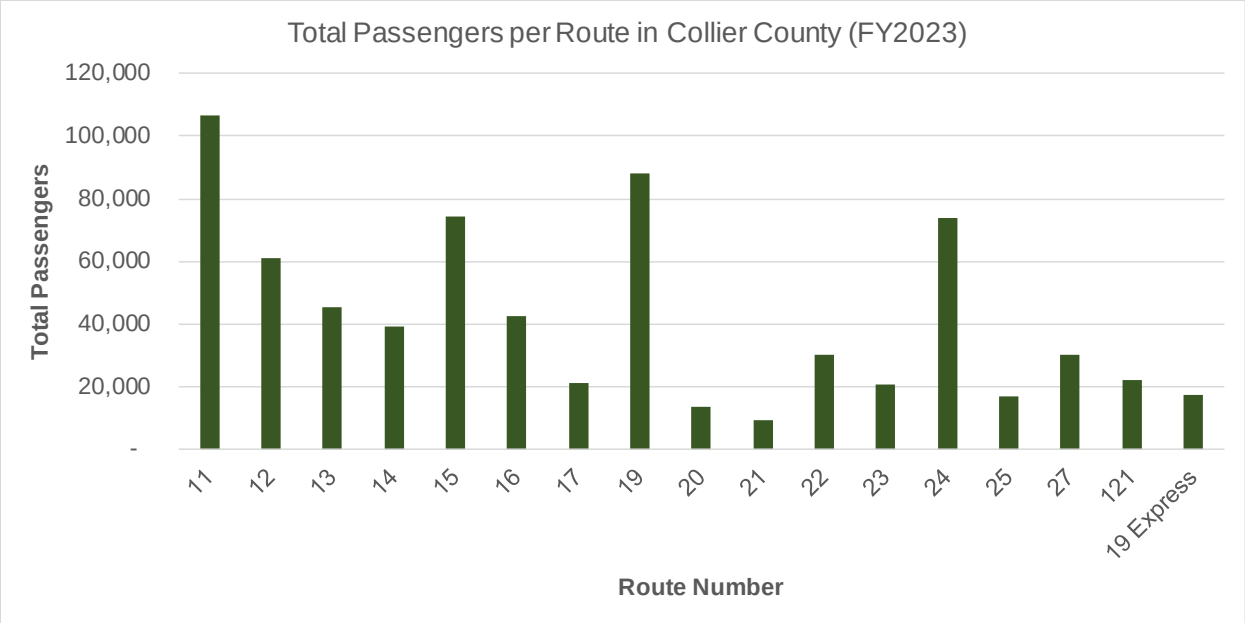


Figure 2-8: Total Passengers per Route in Collier County during FY2023

When examining the total number of passengers per route, Routes 11, 19, and 24 are the three most well-used routes. This is logical, as Route 11 passes through the Central Business District (CBD) in Naples, Route 19 is the only route connecting Immokalee and the downtown, and Route 24 serves the Collier County Government Center (although noted that other Routes do also serve the government center as well). In contrast, Routes 20, 21, and 25 are the least used routes, presenting opportunities to reroute or merge them to better accommodate demand.

*Figure **2-9*** below shows a graph of the passengers per revenue hour in Collier County.

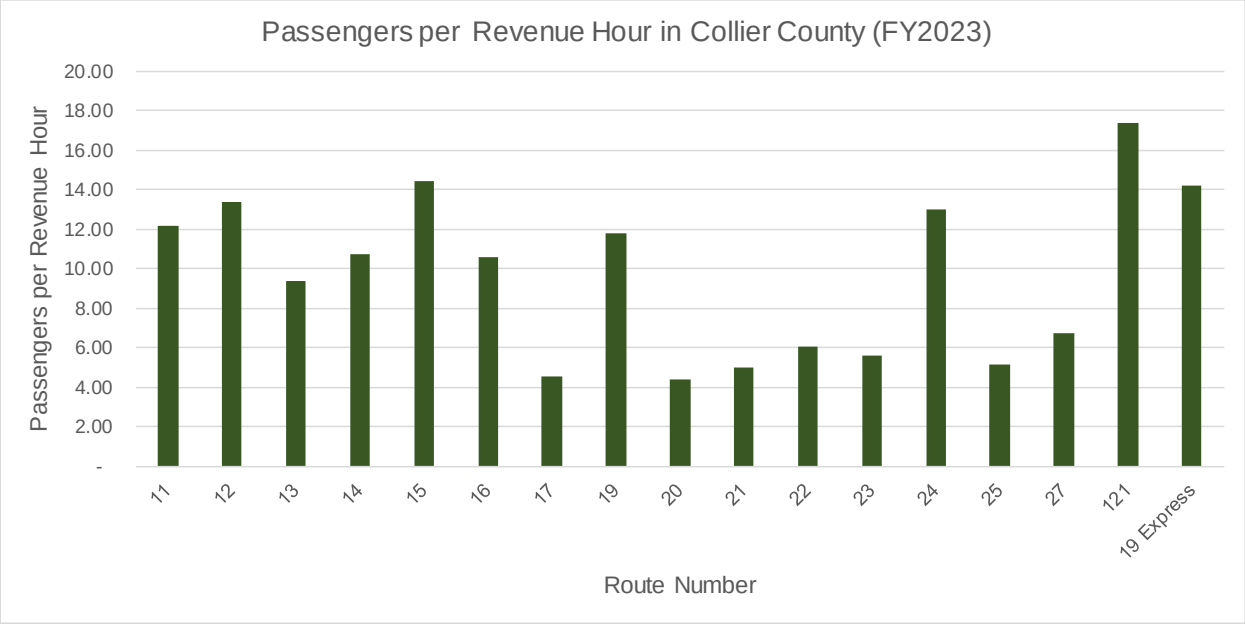


Figure 2-9: Passengers per Revenue Hour in Collier County during FY2023

Routes 121, Route 19 Express and Route 15 have the highest number of passengers per revenue hour, indicating that these routes may serve areas with higher transit dependency or demand and have schedules and frequencies of these routes likely align well with passenger needs. Routes 17, 20 and 21 have the lowest passengers per revenue hour. CAT might consider reallocating resources from low-performing routes to high-performing ones or to support the high-performing routes with increased frequency or extended hours. There may be opportunities to adjust the low-performing routes to better serve potential riders or connect to more popular destinations.

In Figure 2-10 below, ridership was averaged by season to determine seasonal variations for each route.

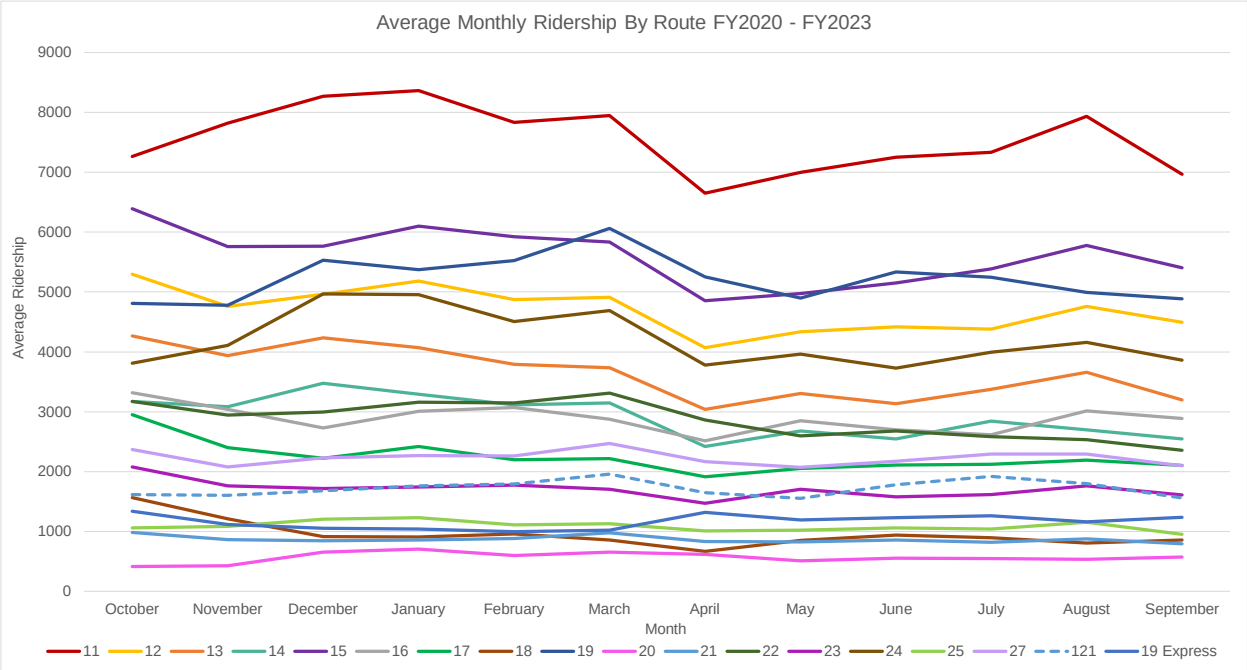


Figure 2-10: Seasonal Variation of Average Monthly Ridership

Other than Route 29, which is the beach shuttle with ridership only during the winter, most routes do not show significant seasonal variation. Route 29 also has lower ridership compared to other routes. Despite winter being a peak tourist season, the lack of significant ridership fluctuations suggests that tourists and seasonal residents may not be heavily utilizing the public transit system. This could be due to several factors like higher spending power of tourists visiting a wealthy area like Collier County. While ridership in the winter tends to be slightly higher than in the later months, promoting transit use among visitors and residents requires improvements to the accessibility and visibility of transit information. For instance, offering a transit pass could incentivize visitors to use the public transportation system, this pass could provide discounts for group travel and even cover multi-modal options if possible.

Figure 2-11 and Figure 2-12 highlight the routes with the highest ridership and riders per revenue hour, focusing on those within or near the core of the city, such as Naples or the Naples Airport. Notably, routes 11, 12, 15, 19, 24, and 121 were selected for this analysis for these reasons.

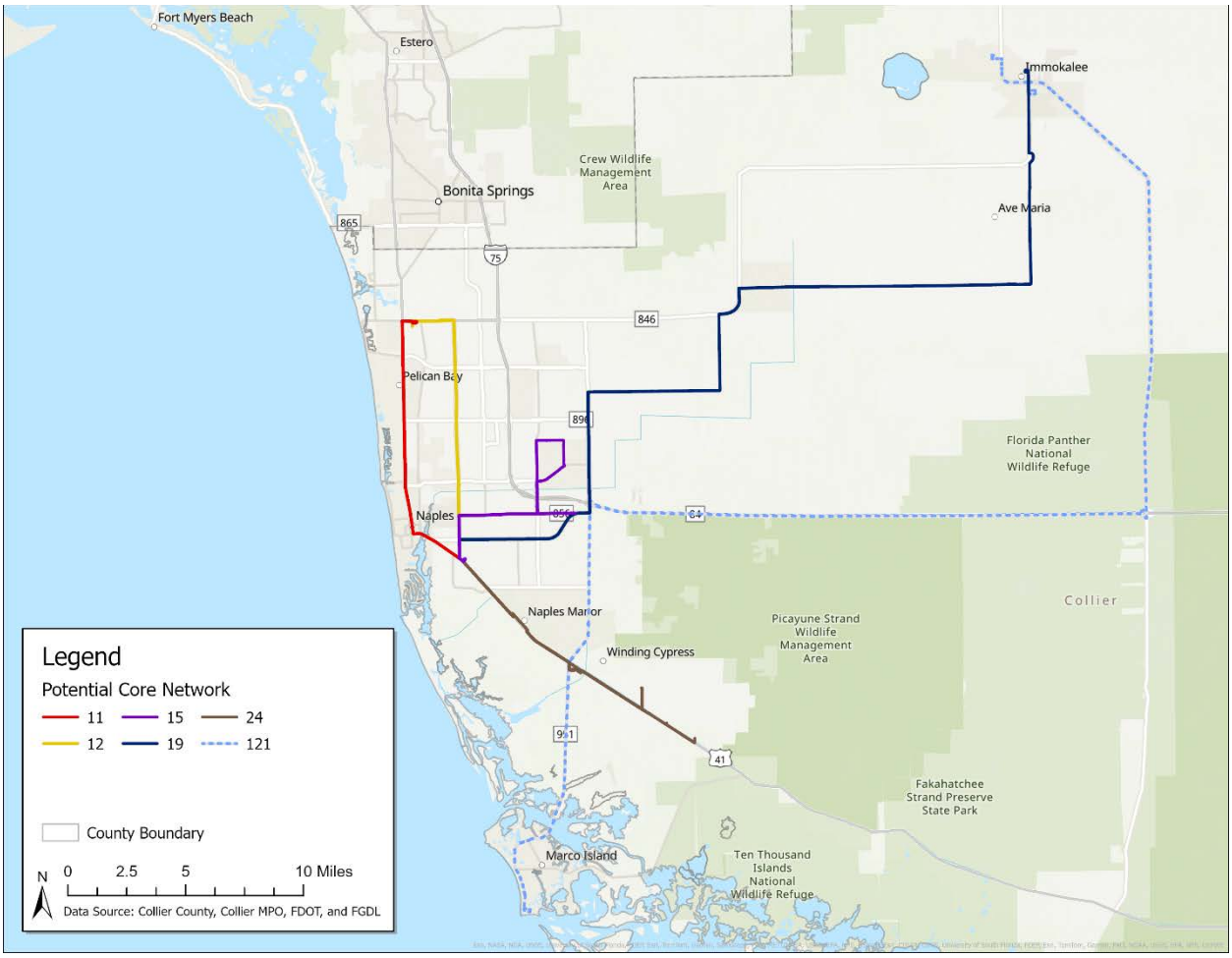


Figure 2-11: Top Ridership Routes in Collier County in FY2023

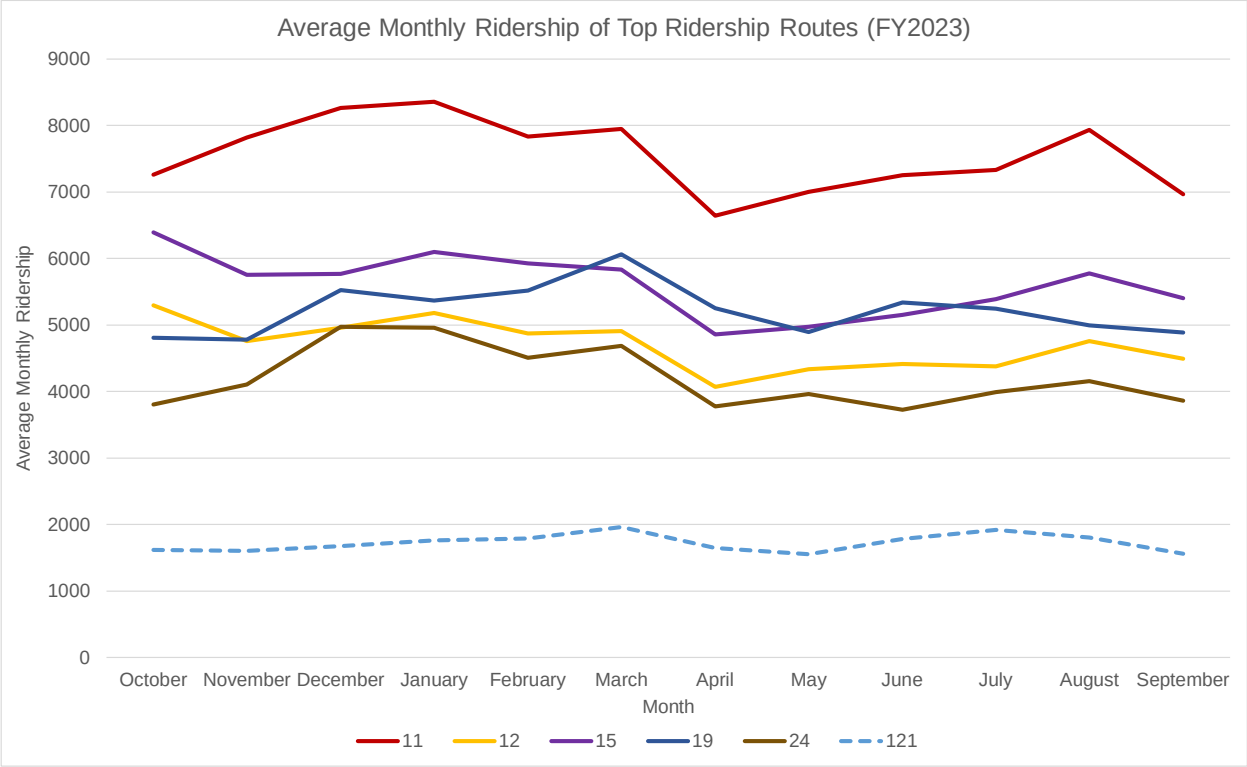


Figure 2-12: Average Monthly Ridership of Top Ridership Routes in Collier County in FY2023

The ridership pattern for these potentially "core" routes is highest between October to February, during the winter season. Ridership dips in April at the end of the peak tourist season. The ridership pattern suggests that tourists and seasonal residents may be contributing to increased usage of these core routes during the peak winter season. This aligns with the general tourism patterns in Collier County.

2.4.2 FAREBOX RECOVERY

For 2022 financial year, the overall farebox recovery ratio for the CAT system is 8%, derived from the ratio between the total fare revenue and total operating cost values from NTD data. This represents a 20% decrease (2 percentage points) from FY2018 farebox recovery ratio of 10%.

2.4.2.1 Recent Fare Studies and Changes for Upcoming Years

Following the fare study completed in 2018, the current fare structure for CAT is still in line with the approved changes from that study which are shown in Table 2-5 below.

Table 2-5: Fare Structure in Collier County (2024)

Fare Category	Fare	Reduced Fare
One-Way	$2.00	$1.00
Children 5 years of age and younger	Free	Free
Marco Express	$3.00	$1.50
Transfers – up to 90 minutes	Free	Free
Day Passes	$3.00	$1.50
Smart Card Pass		
15-Day Pass	$20.00	$10.00
30-Day Pass	$40.00	$20.00
Marco Express 30-Day Pass	$70.00	$35.00
Discounted Pass		
Summer Paw Pass (Valid June 1 – August 31 for students. Price includes Smart Card)	$30.00	
30-Day Corporate/Perk Pass (300+ Employees)	$29.75	
Smart Card Media Fees		
Smart Card	$2.00	
Registration	$3.00	
Replacement with Registration	$1.00	

Source: rideCAT website; Collier County

In March 2024, CAT conducted a regional service and fare study with the aim of evaluating how best to serve the regional transit demands in conjunction with LeeTran (Lee County Transit) which included an evaluation of the most appropriate fare structure to deploy. This fare policy analysis evaluated the benefits and drawbacks of having a joint fare structure with LeeTran or having a separate structure.

The culmination of this review concluded that it would be better to maintain a separate fare structure for the regional services. This means each agency charges their own fares and keeps the revenues on their own vehicles as this provides the most cost-effective solution at this time as there is only one regional service with only 1 additional service proposed.

2.4.2.2 Strategies to Improve the Farebox Recovery

There are a number of different strategies that can be used to increase the farebox recovery ratio in order to make the transit system more cost effective. These include:

- Increasing ridership:
    - Prioritizing higher ridership of routes, by making sure they serve areas of high demand and as well as major activity centers to increase the number of riders and therefore the revenue being generated.
    - Increasing the accessibility of the fixed route transit network to encourage and enable TD and ADA passengers to be able to use the fixed route system
    - Attract new riders through increasing frequency of services and increased marketing and communications of the benefit of transit. Note that when increasing services, it would be important to secure additional funding from other potential sources so as not to increase the cost for CAT.

- Opportunities exist around partnering with local business and institutions to provide transit benefits (in the form of discounts of deals) to employees and students to further increase the likelihood of ridership.
- Engage with the community to understand how best transit can serve them, and what would make them use transit more to increase ridership.
- Introduce ancillary services or additional services on and around transit (both on-board and at major stops or interchanges) such as free Wi-Fi. This can take the form of mobility hubs to increase transit usage and increase integration with other more sustainable modes.

- Reducing operational costs:
  - Increasing efficiency of service delivery which can be done by optimizing routes and scheduling making use of latest scheduling technology available.
  - Investment in technology can help to improve fare collection and reduce fare evasion.
  - Utilizing more fuel efficient or energy saving vehicles that cost less to operate and run.
- Adjusting fares:
  - There could be opportunities to integrate fares among different modes and other agencies.
  - Introducing a form variable pricing based on time of day or demand to optimize revenue.

2.5 Trend and Peer Comparison Analysis

This section provides trend analyses for key performance, effectiveness, and efficiency measures for the CAT system for the past 5 years. In addition, comparisons to peer agencies have been provided to show how the CAT system performs against similar systems.

This evaluation was conducted using data directly obtained from the National Transit Database (NTD) across a number of different variables for transit performance. These system performance measures are recommended by the FDOT TDP Handbook for general performance, efficiency, and effectiveness, as listed and categorized in the table below.

Table 2-6: System Performance Review Measures

Performance Measures	Effectiveness Measures	Efficiency Measures
Unlinked Passenger Trips	Unlinked Passenger Trips per Capita	Operating Expense per Capita
Passenger Miles Travelled	Passenger Miles Travelled per Capita	Operating Expense per Unlinked Passenger Trip
Vehicle Revenue Miles	Vehicle Revenue Miles per Capita	Operating Expense per Passenger Miles Travelled
Vehicle Revenue Hours	Unlinked Passenger Trips per Vehicle Revenue Mile	Operating Expense per Vehicle Revenue Miles

Vehicles Operating/Available at Maximum Service	Unlinked Passenger Trips per Vehicle Revenue Hour	Operating Expense per Vehicle Revenue Hours
Operating Expense		Vehicle Revenue Miles per Vehicle
Fare Revenue		Farebox Recovery Ratio
		Average Fare

2.5.1 PEER SELECTION

The peer selection process followed the methodology provided by the Transit Cooperative research Program (TCRP) Report 141: A Methodology for Performance Measurement and Peer Comparison in the Public Transportation Industry and recommended by the FDOT TDP Handbook (2022).

The guidance recommends a minimum of 4 agencies and for the purposes of this TDP, 10 agencies have been selected as the final peer group. It is crucial to select a suitable group of peer agencies to ensure that credible comparisons can be made to provide insight and trigger action, as opposed to poorly chosen peers which can produce irrelevant results.

For the purpose of performance measuring, an initial group of 16 peers was formed to be compared to CAT. For this TDP update, all previous agencies that were included in the prior TDP update were included as well as additional agencies that were deemed to be similar in nature to CAT. This initial list of peer agencies consisted of:

Table 2-7: Transit System Peer Review Selection

Transit System	**Location**	Peer Description
The M (Montgomery Area Transit)	City of Montgomery, AL	From Previous TDP
TTA (Tri-State Transit Authority)	Huntington, WV	From Previous TDP
The Wave Transit System	City of Mobile, AL	From Previous TDP
ART (Asheville Redefines Transit)	City of Asheville, NC	From Previous TDP
GCT (Gwinnett County Transit)	Lawrenceville, GA	From Previous TDP
PCPT (Pasco County Public Transportation)	New Port Richey, FL	From Previous TDP
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	From Previous TDP
Breeze Transit (Sarasota County Area Transit)	Sarasota, FL	Newly Added
LeeTran (Lee County Transit)	Fort Myers, FL	Newly Added
Bayway (Bay County Transportation)	Pensacola, FL	Newly Added
GoLine (Indian River County)	Vero Beach, FL	Newly Added
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	Newly Added
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	Newly Added
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	Newly Added
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	Newly Added

The selection of potential peers was conducted using the peer selection methodology outlined in the FDOT TDP Handbook, employing validated 2022 National Transit Database (NTD) data and the Florida Transit

Information System (FTIS). Additional potential peers that were selected consisted of transit agencies from the previous TDP and agencies located in the southeastern United States, specifically those with coastal characteristics in their geographic profiles.

From the newly identified transit agencies, Breeze Transit (Sarasota, FL), LeeTran (Fort Myers, FL), Bayway (Pensacola, FL), GoLine (Vero Beach, FL), and Citrus Connection (Lakeland, FL) were chosen because they are situated within Florida, either in coastal counties or counties near Collier County. Additionally, CARTA (North Charleston, SC), ECAT (Pensacola, FL), and CCRTA (Hyannis, MA) were selected based on their recommendation as top peers to CAT according to the FTIS Urban iNTD tool. It is worth noting that ART was also recommended but was already included in the previous TDP peer group.

NTD data for this initial set of peer agencies was then obtained and analyzed to determine similarity to CAT and suitability to be used as a peer. Likeness scores were calculated for 14 different indicators including 8 operating characteristics and 6 exogenous variables. A secondary screening was also performed with additional indicators to rule out any anomalies within the initial peer group. A detailed account of the selection methodology can be found in Appendix A.

Based on the results from the initial likeness score comparison and the secondary screening, a final set of 10 agencies were selected, as listed in Table 2-8 below. The table also includes the likeness score for each agency and the reasons that the agency was selected to be in the final peer group.

Table 2-8: Average of Likeness Score Sums by Peer Group

Peer Agency	Likeness Score	Reasoning for Top 10 Selection
Breeze Transit (Sarasota County Area Transit), Sarasota, FL	6.98	Likeness score and location of the peer is desirable.
LeeTran (Lee County Transit), Fort Myers, FL	7.80	Likeness score from the primary review was substantially lower and location of the peer is desirable.
Bayway (Bay County Transportation), Pensacola, FL	6.03	Likeness score and location of the peer is desirable.
ECAT (Escambia County Area Transit Authority), Pensacola, FL	6.05	Likeness score
CCRTA (Cape Cod Regional Transit Authority), Hyannis, MA	6.30	Likeness score
CARTA (Charleston Area Regional Transportation Authority), North Charleston, SC	6.06	Likeness score
Citrus Connection (Lakeland Area Mass Transit District), Lakeland, FL	5.68	Likeness score and location of the peer is desirable.
The Wave (Cape Fear Public Transportation Authority), Wilmington, NC	5.49	Likeness score
The Wave Transit System, City of Mobile, AL	6.81	Likeness score
PCPT (Pasco County Public Transportation), New Port Richey, FL	6.35	Likeness score

It is acknowledged as part of the methodology that peers will not be exactly like one another in all categories and the approved methodology is built to allow for that and allow for similarity in only a few other categories.

For full details on stage 2 of the screening refer to Appendix A for the full Peer Selection methodology.



2.5.2 NORMALIZING DATA

To accurately portray cost data, all monetary values were normalized to reflect the effects of inflation and differences in labor costs between geographical regions. It is important to consider for labor costs differences as it allows for conclusions to be drawn with more certainty that the cost differences between agencies are due to internal agency efficiency variances rather than external cost variation. Labor costs are also typically the largest component of an agency's operating costs. It is relevant to take inflation rates into account to see whether an agency's costs are changing faster or slower than inflation when conducting trend analyses.

To adjust for differences in labor costs between counties, average labor wage rates were used to recalculate cost data. Annual average weekly wages for 2022 were obtained from the US Bureau of Labor Statistics' Quarterly Census of Employment and Wages. All occupation types were included in the average calculation as agencies have no control over general labor environments in the county, which the cost data is being adjusted for, as opposed to the industry-specific labor rates that the agencies have some control over. Including all occupations also allows for an agency to analyze how much of its labor is spent in comparison to the county's average wages, as well as to adjust its costs to reflect changes in the county's overall cost of living. The peer agencies' cost data was adjusted for labor cost differences by multiplying the raw cost data from NTD by the ratio between Collier's average labor cost over the peer agency county's average labor cost.

To adjust for inflation in trend analyses, consumer price indices (CPI) were used to recalculate cost data. As the selected peers are located in different states around the United States, national CPIs were used. CPI values for the years of 2018 to 2022 were obtained from the US Bureau of Labor Statistics' CPI Inflation Calculator to adjust cost data for inflation across these years. This was done by multiplying the raw cost data from NTD by a ratio between the initial year's (2018) CPI over the analysis year's CPI.

2.5.3 PERFORMANCE MEASURES

Data for select system characteristics were taken from NTD to assess the general operating performance of the CAT system and its chosen peers. All of the performance indicators are based on exact data values from the NTD database, reflect total values for all modes.

2.5.3.1 Unlinked Passenger Trips

Unlinked passenger trips (UPT) refers to the number of people riding only one public transit vehicle from origin to destination, counting a new trip each time a vehicle is boarded no matter how many transfers are made. UPT data represents the market demand for service, and a higher number of passenger trips is considered a positive metric. UPT numbers for CAT decreased by almost 30% from 0.95 million trips in 2018 to 0.65 million in 2021, but increased to 0.75 million in 2022. The growth in trips from 2021 to 2022 suggests service improvements have started to take effect as ridership has returned following the COVID pandemic. Due to three peers with much higher UPT values, CAT falls below the average UPT (shown with the orange line in the peer comparison chart below) of the peer group. Excluding these top three peers, Collier has one of the higher UPT values amongst the remaining peers.

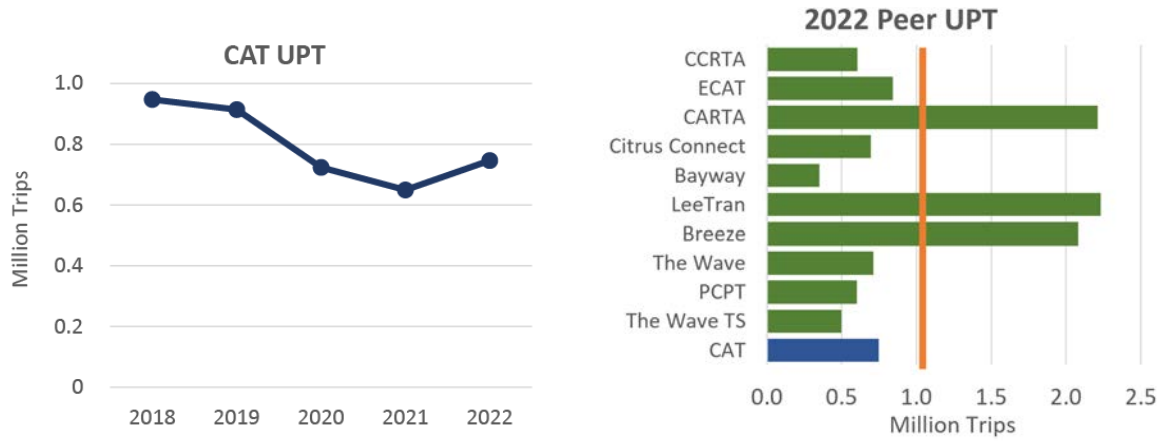


Figure 2-13: 5-year trend (left) and 2022 peer comparison (right) charts for unlinked passenger trips.

2.5.3.2 Passenger Miles Travelled

Passenger miles travelled (PMT) denotes the total distance travelled by all passengers using the service. As with UPT, higher PMT is also a positive metric. PMT numbers for CAT follow the same trend as the UPT numbers, decreasing about 30% from 7.4 million miles in 2018 to 5.3 million in 2021, but increasing to 6.1 million in 2022. This is directly reflective of passenger trips which is to be expected. Similar to UPT, the same three agencies with much higher PMT values are influencing the average value to be higher. CAT PMT is just below the average value and is also one of the higher values excluding these top three agencies.

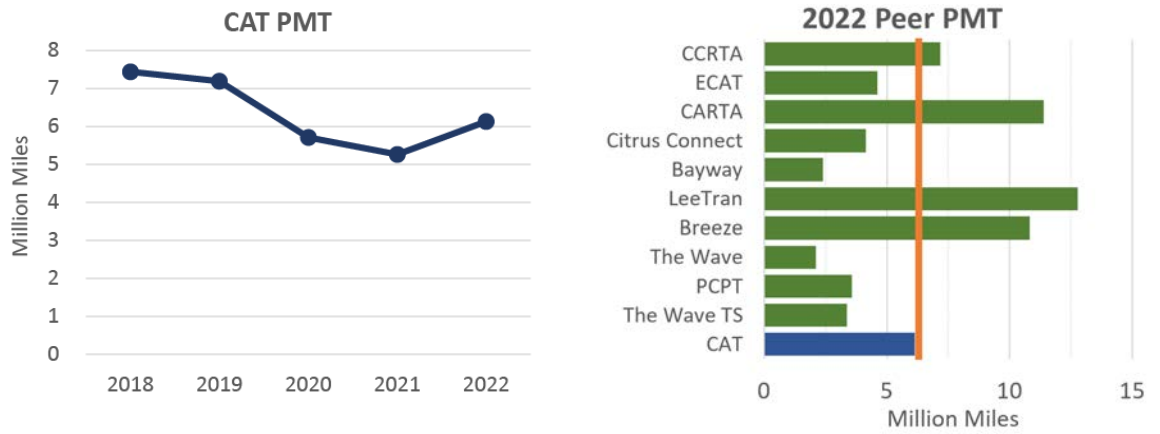


Figure 2-14: 5-year trend (left) and 2022 peer comparison (right) charts for passenger miles travelled.

2.5.3.3 Vehicle Revenue Miles

Vehicle revenue miles (VRM) detail the total distance travelled where the transit service was operating in revenue service, which excludes deadhead travel, training operations, and charter services. VRM as a metric itself is not indicative of positive or negative performance and should be analyzed in relation to productivity and cost-effectiveness measures. The slightly decreasing trend in CAT vehicle revenue miles suggests that services are being withdrawn, and with the lack of riders and passenger miles in 2020 and 2021 but a relatively stable amount of service being provided suggest that a major cost recovery issue would have occurred that is likely still impacting the agency. CAT VRM is just below the peer average, however, VRM itself is not indicative of performance. The larger transit agencies such as LeeTran and Sarasota Breeze most likely run more service or longer routes that result in greater VRM.

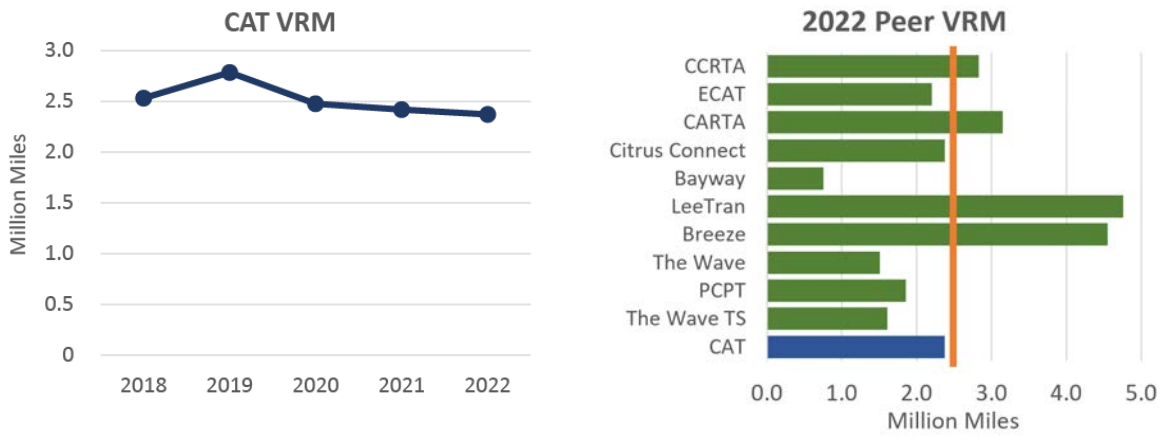


Figure 2-15: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue miles.

2.5.3.4 Vehicle Revenue Hours

Vehicle revenue hours (VRH) represent the total travel time that transit vehicles have operated during revenue service. Like with VRM, VRH as a metric itself is not indicative of positive or negative performance and should be analyzed in relation to productivity and cost-effectiveness measures. Given than CAT VRH values have gone up slightly from 2021 to 2022 compared to decreasing VRM, this would suggest that routes that serve longer distances and cover more miles, possibly towards more rural areas have been restricted and instead shorter routes with more service has replaced it. CAT VRH is below the peer average, but again VRH itself is not indicative of performance. The larger transit agencies such as LeeTran and Sarasota Breeze most likely run more service or for longer times which results in greater VRH.

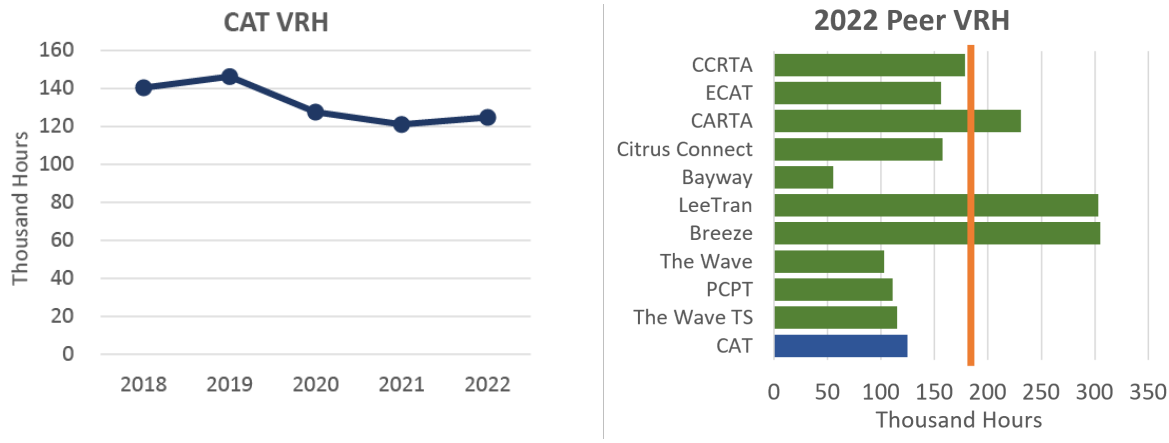


Figure 2-16: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue hours.

2.5.3.5 Vehicles Operating/Available at Maximum Service

Vehicles operating or available at maximum service counts the number of vehicles that are required for (VOMS) or are available to (VAMS) the transit agency to operate at peak full service. VOMS is important for assessing fleet size, directly relating to the network structure and availability of service. VOMS/VAMS numbers can impact the number of routes and frequency of service offered by the transit agency. VOMS helps to determine the required vehicle demand during maximum service versus the vehicles available. VAMS increased from 2020 to 2021 during the pandemic, when less service was required and VOMS was lower. This likely resulted in the decrease in VAMS from 2021 to 2022, however, VOMS has since increased, which would suggest that CAT are operating very close to the line in terms of not having enough vehicles to provide service. Both CAT VOMS and VAMS values are below the peer average, but this is not indicative of performance as agencies will require different numbers of vehicles due to varying service.

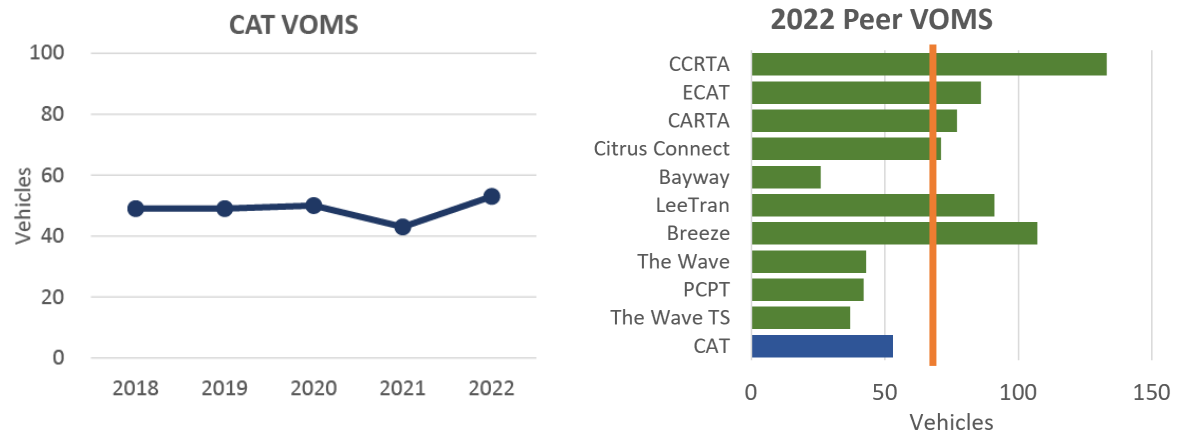


Figure 2-17: 5-year trend (left) and 2022 peer comparison (right) for vehicles operating at maximum service.

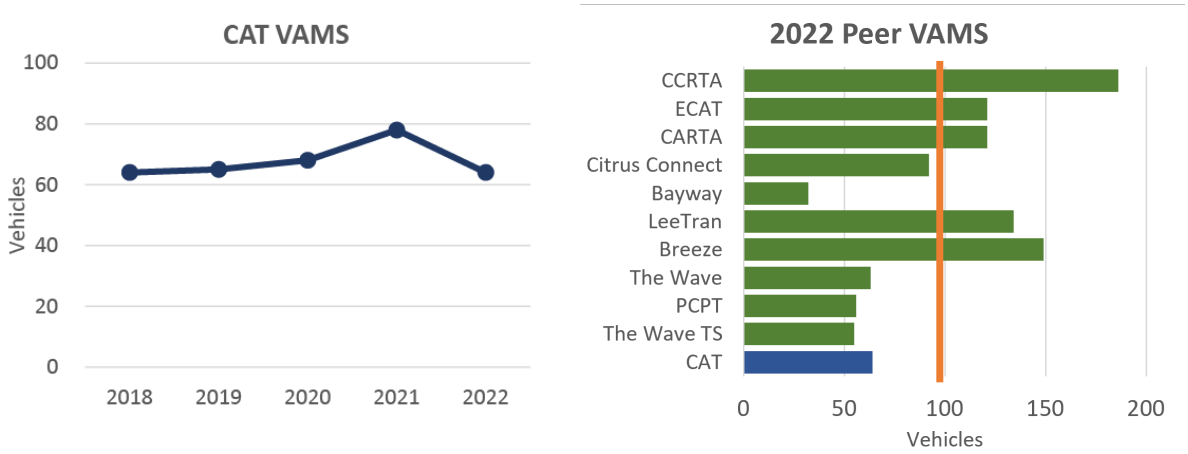


Figure 2-18: 5-year trend (left) and 2022 peer comparison (right) for vehicles available at maximum service.

2.5.3.6 Operating Expense

Total operating expense considers all costs associated with operating the transit service, including operational, maintenance, and administrative costs. The NTD data values for operating expense were recalculated for the peer comparison chart to account for differences in labor costs across different geographical regions. The CAT trend chart includes a secondary data series reflecting the cost data in

2018-dollar values, depicting the impacts of inflation over the years. CAT operating expenses have shown a general increase in trends since 2018 which is to be expected as service gets more expensive to deliver. However, the increase in operating expenses don't appear as drastic between 2021 to 2022 in 2018-dollars, indicating the increase in cost is mostly due to the impact of inflation. Operating expense should be analyzed in relation to fare revenue and farebox recovery rates to determine how much of the cost of the service is being recuperated. CAT operating expenses are below the peer average, indicating that the transit system does not cost as much to operate compared to the other larger agencies.

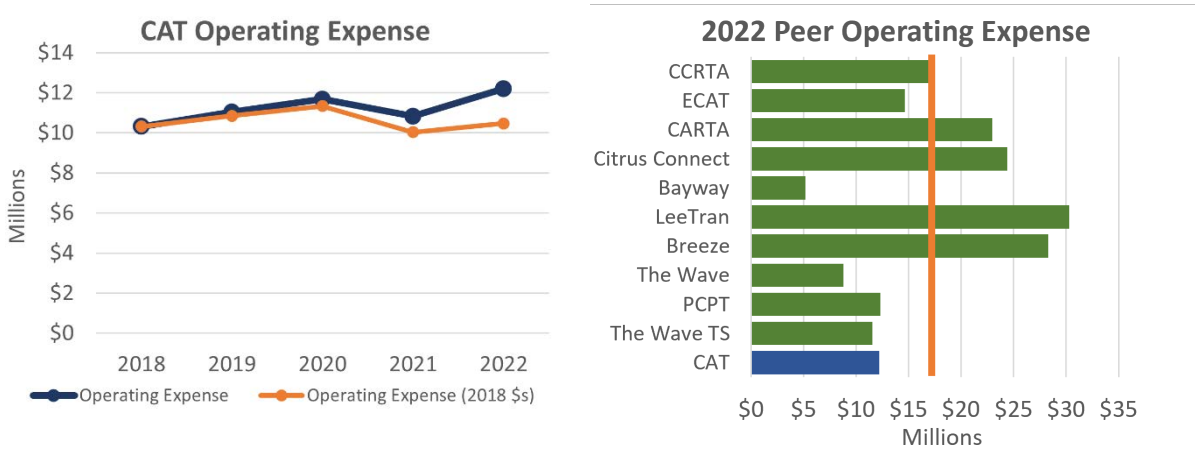


Figure 2-19: 5-year trend (left) and 2022 peer comparison (right) charts for operating expense.

2.5.3.7 Fare Revenue

Fare revenue is the total amount of revenue generated from fare-paying transit service users. Again, the CAT trend chart includes a secondary data series reflecting the revenue data in 2018-dollar values, depicting the impacts of inflation over the years. Post-pandemic, CAT fare revenue has been steadily increasing which would be in line with passenger trips also increasing. As with operating expense, fare revenue is most useful when analyzed in relation to operating expense and farebox recovery rates. CAT fare revenue is below the peer average, indicating that CAT receives less revenue from rider fares compared to other agencies, especially CARTA with a significantly higher fare revenue value.

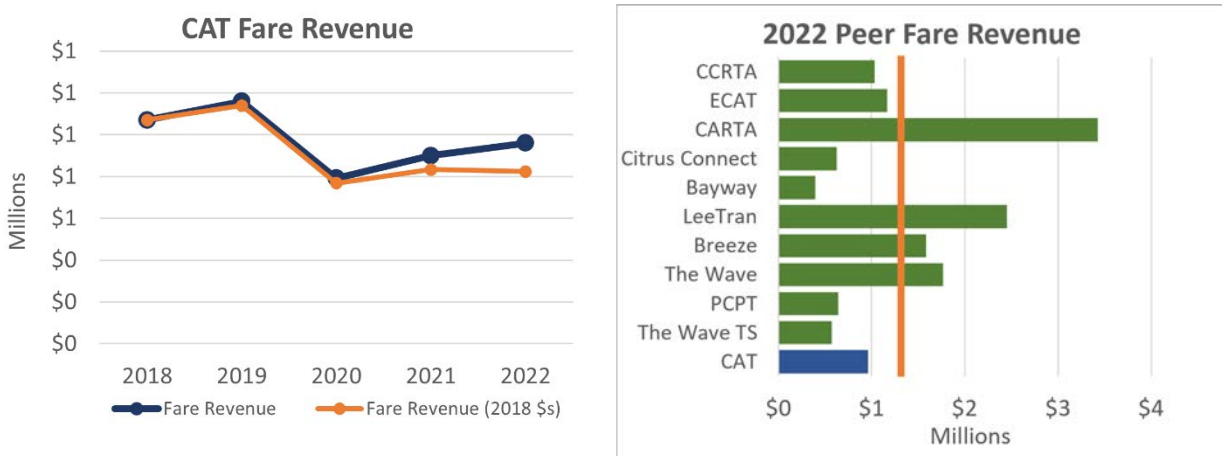


Figure 2-20: 5-year trend (left) and 2022 peer comparison (right) charts for fare revenue.

2.5.4 EFFECTIVENESS MEASURES

Service effectiveness is represented by performance characteristics in relation to the population, as the selected indicators demonstrate to what extent service-related goals are being achieved. This includes service supply, service consumption, and quality of service. Effectiveness measure values are obtained or derived from NTD data and reflect total values for all modes.

2.5.4.1 Unlinked Passenger Trips/Passenger Miles Travelled per Capita

UPT per capita is calculated by dividing UPT by the service area population, measuring transit usage within the service area. Similarly, PMT per capita is derived from dividing PMT by the service area population. Higher values represent a greater utilization of service. CAT UPT and PMT per Capita values have been decreasing over the years, with a steeper decrease towards 2020, likely due to people taking transit less during the pandemic. There was a small increase from 2021 to 2022 as ridership began to improve back towards pre-pandemic levels. CAT UPT per capita is below the peer average and PMT per capita just slightly below, demonstrating that service utilization is less effective compared to other agencies, especially CARTA with a significantly higher values.

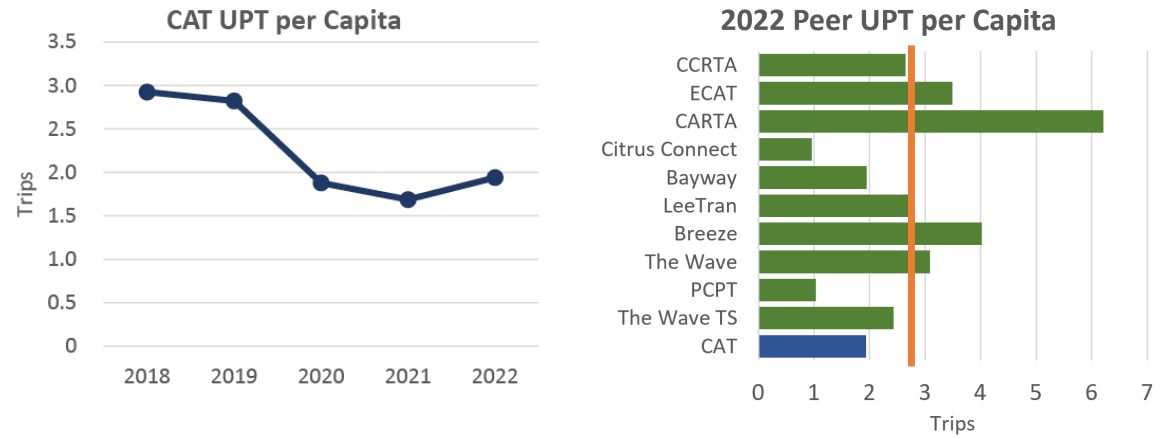


Figure 2-21: 5-year trend (left) and 2022 peer comparison (right) for unlinked passenger trips per capita.

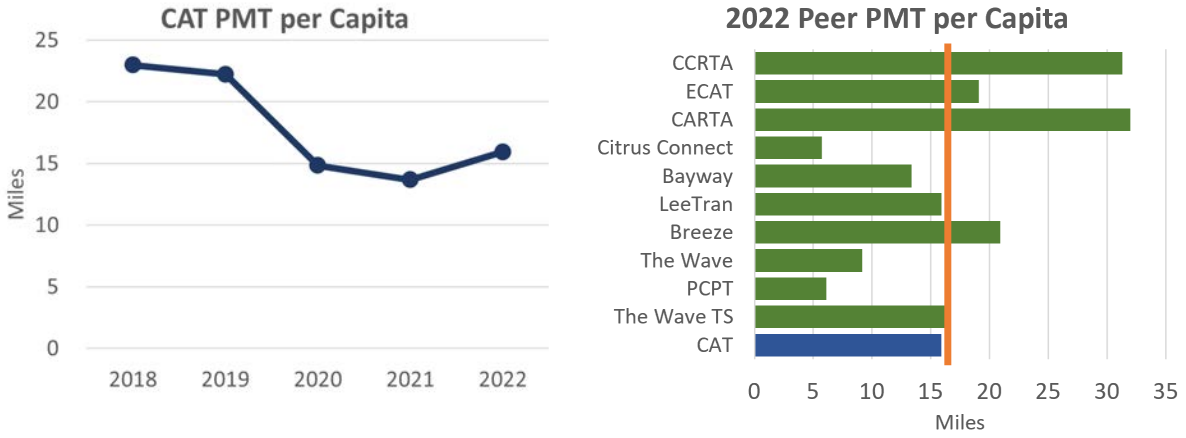


Figure 2-22: 5-year trend (left) and 2022 peer comparison (right) for passenger miles travelled per capita.

2.5.4.2 Vehicle Revenue Miles per Capita

VRM per capita is calculated from the dividing VRM by the service area population, measuring the supply of service provided based on the population of the service area. There was a significant decrease in VRM per capita from 2019 to 2020, likely due to reduced service as a result of the pandemic. Values stayed relatively steady after 2020, but still slightly decreasing. The 2022 CAT value is just below the peer average.

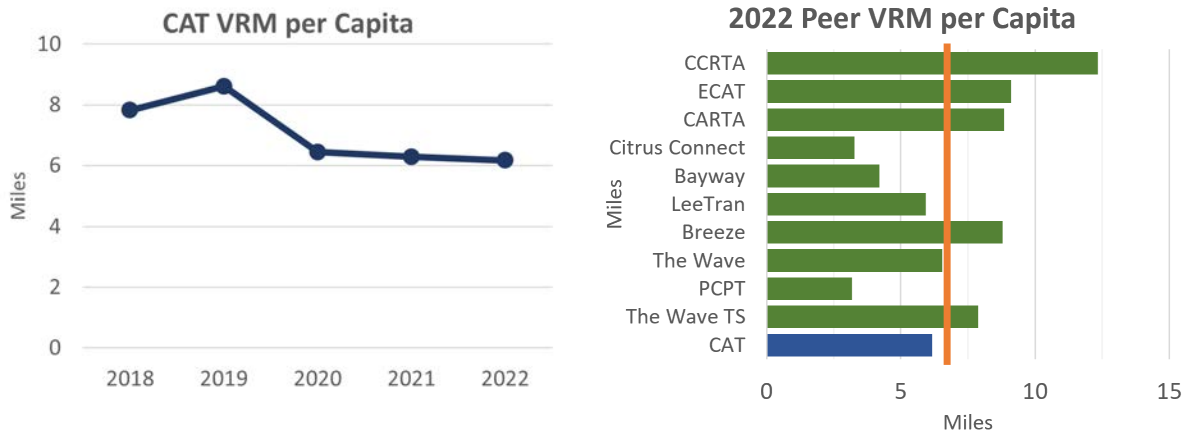


Figure 2-23: 5-year trend (left) and 2022 peer comparison (right) for vehicle revenue miles per capita.

2.5.4.3 Unlinked Passenger Trips per Vehicle Revenue Mile/Vehicle Revenue Hour

Dividing UPT by VRM or VRH can serve as other indicators for productivity and service consumption, measuring the utilization rates per unit of provided service. Higher values are desirable as it reflects that there is greater utilization of service. CAT UPT per VRM values stayed consistent for four years after a decrease from 2018 to 2019, while UPT per VRH values decreased over the years and only increased from 2021 to 2022. CAT UPT per VRM is below average and UPT per VRH is average amongst the peers.

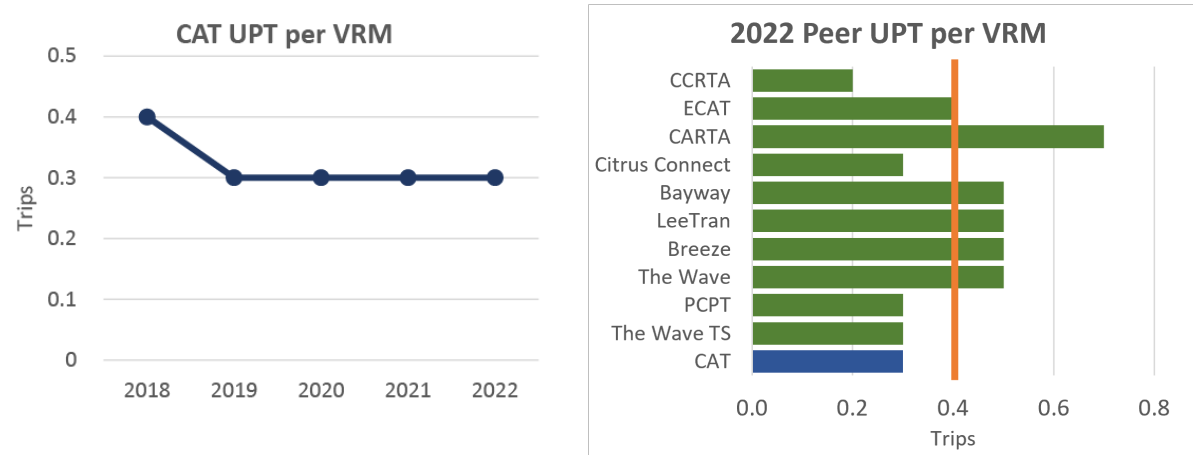


Figure 2-24: 5-year trend (left) and 2022 peer comparison (right) for unlinked trips per vehicle revenue mile.

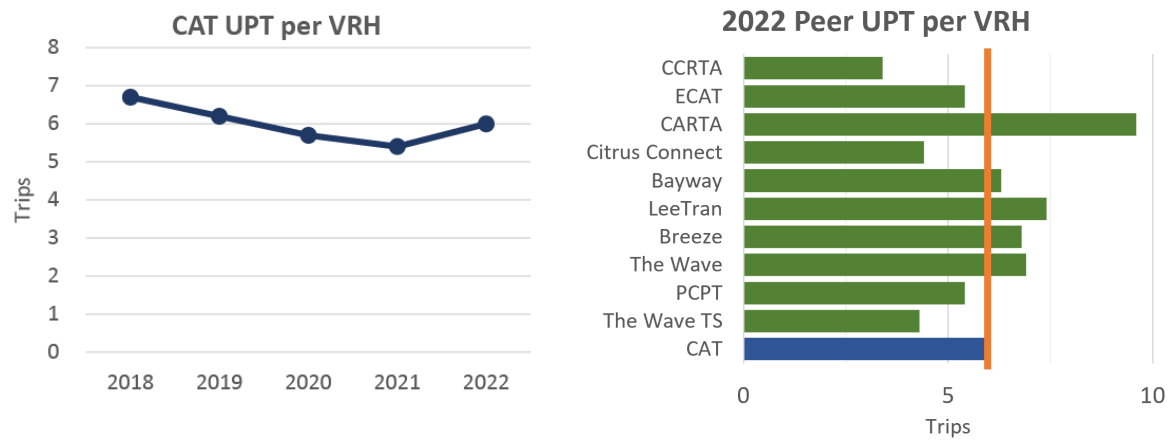


Figure 2-25: 5-year trend (left) and 2022 peer comparison (right) for unlinked trips per vehicle revenue hour.

2.5.5 EFFICIENCY MEASURES

Service efficiency revolves mostly around operating expenses and a few other indicators, in essence, how much it costs to provide and run the service. Most of the efficiency measures are derived from ratios between two performance measures, and again reflect total values for all modes. The data values for all measures involving operating expense were recalculated for the peer comparison charts to account for differences in labor costs across different geographical regions. The trend charts include secondary data series reflecting the cost data in 2018-dollar values, depicting the impacts of inflation over the years.

2.5.5.1 Operating Expense per Capita

Operating expense per capita reflects the total investment spent on provided transit services in relation to the service area population. The metric itself reflects greater investment in transit with higher values, however, there are many additional underlying considerations including productivity, demand, and utilization. Operating expense per capita decreased from 2019 to 2021, possibly due to lowered costs from less service during the pandemic, then increased in 2022. CAT's operating expense per capita value is below the peer average, indicating that it spends less per capita to operate compared to other agencies.

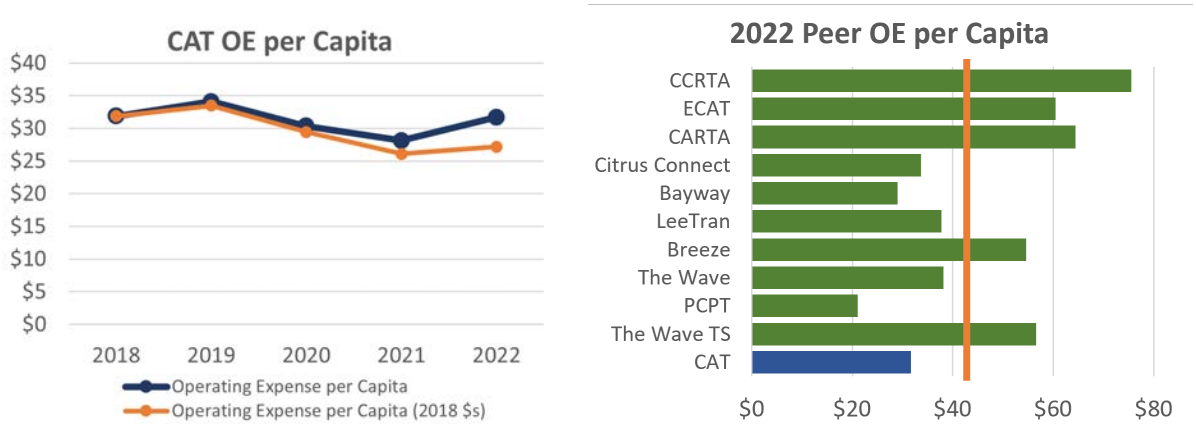


Figure 2-26: 5-year trend (left) and 2022 peer comparison (right) charts for operating expense per capita.

2.5.5.2 Operating Expense per Unlinked Passenger Trip/Passenger Mile Travelled

Operating expense per UPT/PMT indicate the average cost to provide service for each unlinked trip or passenger mile, showcasing the market demand for the service and how service is delivered. The lower these values, the better, as it is ideal to minimize cost per trip/mile. The trends for operating expense per UPT/PMT are identical; increasing up to 2021 and slightly decreased in 2022. The increase from 2020 to 2021 was mostly due to inflation as the trends decreased from 2020 to 2022 in 2018-dollar values. The operating expense per UPT/PMT values for CAT are below the peer averages, meaning that it costs less to operate per trip/mile compared to other agencies.

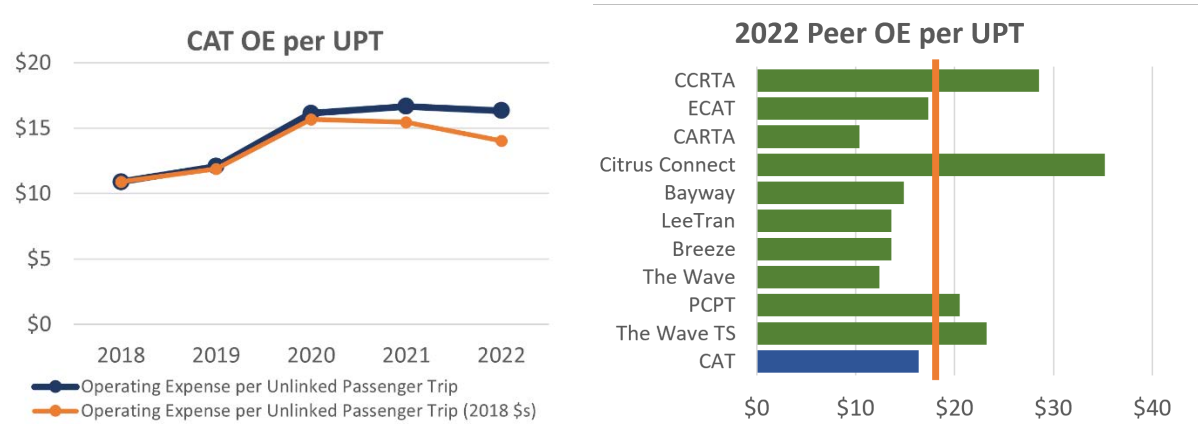


Figure 2-27: 5-year trend (left) and 2022 peer comparison (right) for operating expense per unlinked trip.

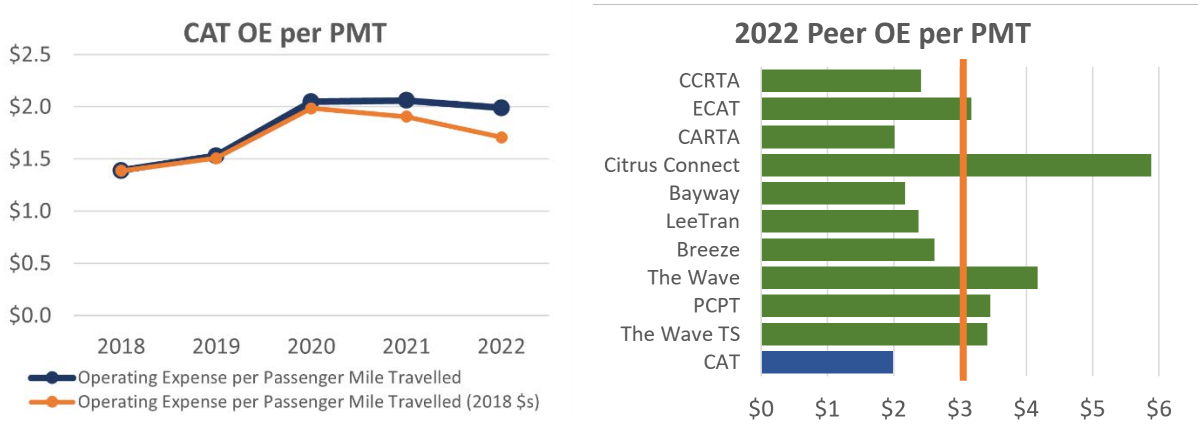


Figure 2-28: 5-year trend (left) and 2022 peer comparison (right) for operating expense per passenger mile.

2.5.5.3 Operating Expense per Vehicle Revenue Mile/Vehicle Revenue Hour

Operating expense per VRM/VRH are average cost calculations for every service mile or hour, evaluating the efficiency of transit service delivery. Lower values are ideal as to minimize the cost per mile/hour. CAT operating expense and vehicle revenue miles have been consistently increasing, except for a slight decrease from 2020 to 2021. Apart from Citrus Connect, the operating expense per VRM/VRH values are fairly close together across the different agencies. CAT's values are below the peer averages, demonstrating that it costs less to operate per mile/hour compared to other agencies.

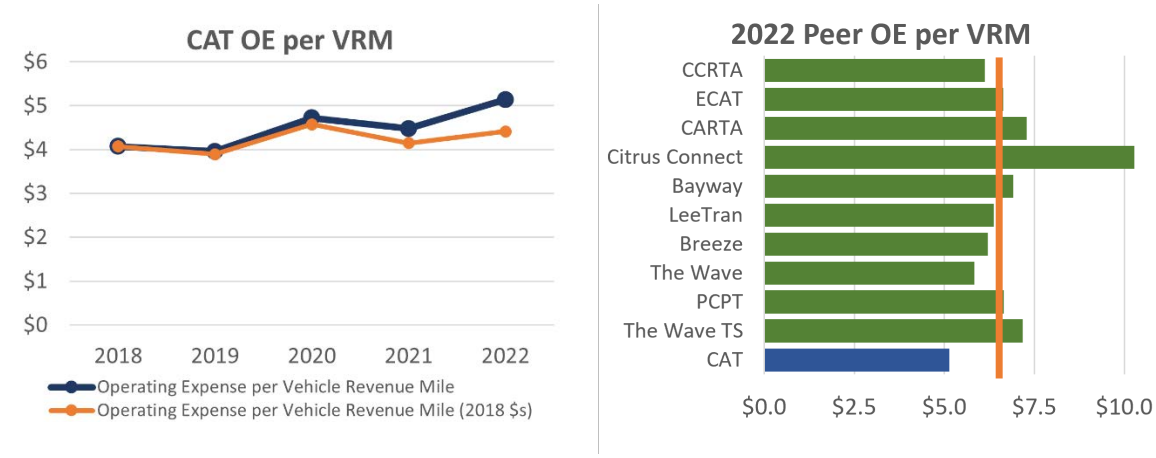


Figure 2-29: 5-year trend (left) and 2022 peer comparison (right) for operating expense per revenue mile.

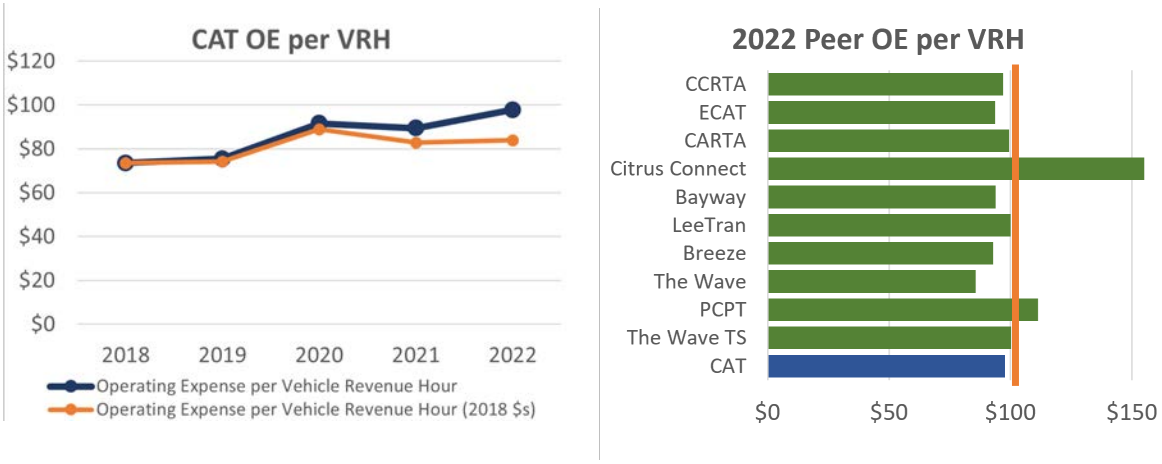


Figure 2-30: 5-year trend (left) and 2022 peer comparison (right) for operating expense per revenue hour.

2.5.5.4 Vehicle Revenue Miles per Vehicle

VRM per vehicle is the average service provided by each vehicle in operation during maximum service, derived from dividing VRM by VOMS. It is an indication of vehicle utilization, but there are other contextual considerations to be made including fleet size and age. VRM per vehicle values decreased from 2019 to 2021, likely due to lowered vehicle utilization during the pandemic. CAT has the highest VRM per vehicle value compared to the other peer agencies, indicating high vehicle utilization.

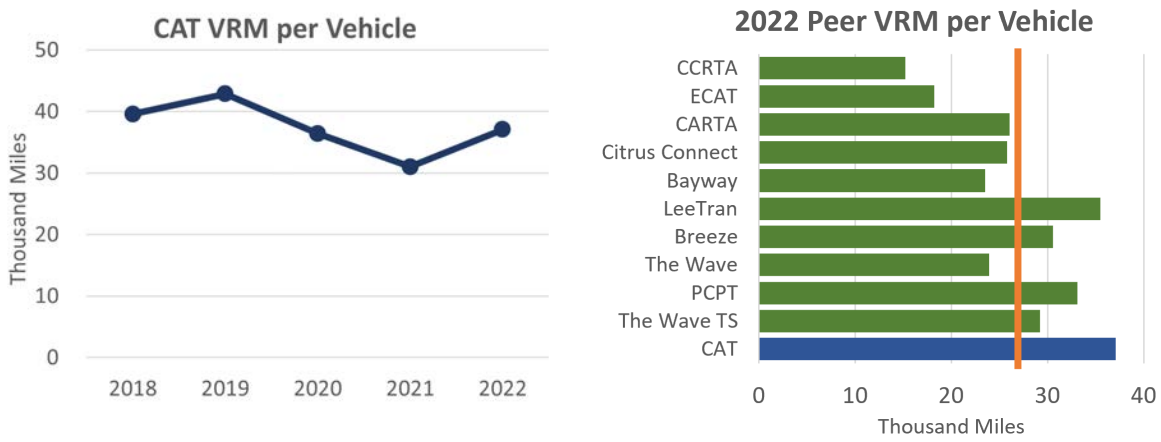


Figure 2-31: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue mile per vehicle.

2.5.5.5 Farebox Recovery Ratio

Farebox recovery ratio is the percentage of the total operating expenses that are funded by total fare revenue from service users, equating fare revenue over operating costs. Higher farebox recovery is desired as that means a greater percentage of the operating costs are covered by passengers compared to other funding sources. The farebox recovery ratio of approximately 8% in 2022 demonstrates a low level of recovery and therefore indicating that the transit network is heavily reliant on other funding sources. However, CAT is performing below but near the peer mean which suggests that it is performing at an average level in comparison to other agencies, many of whom are performing worse.

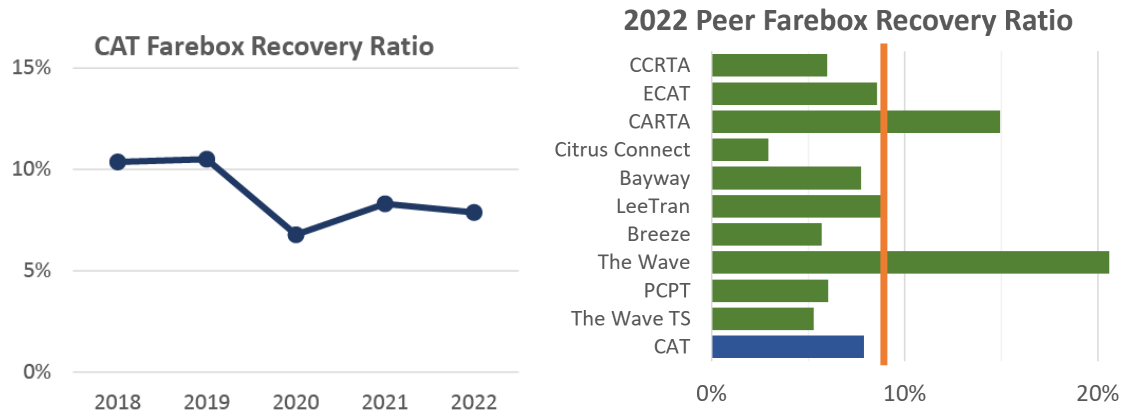


Figure 2-32: 5-year trend (left) and 2022 peer comparison (right) charts for farebox recovery ratio.

2.5.5.6 Average Fare

Average fare is the average amount paid per passenger per trip and is calculated by dividing fare revenue by UPT. The metric itself is not necessarily indicative of performance but is a good comparison to other transit systems in terms of fare cost. CAT's average fare value is right at the peer average, showing that the fares implemented by CAT are comparable to the other agencies, other than The Wave, which has a much higher average fare.

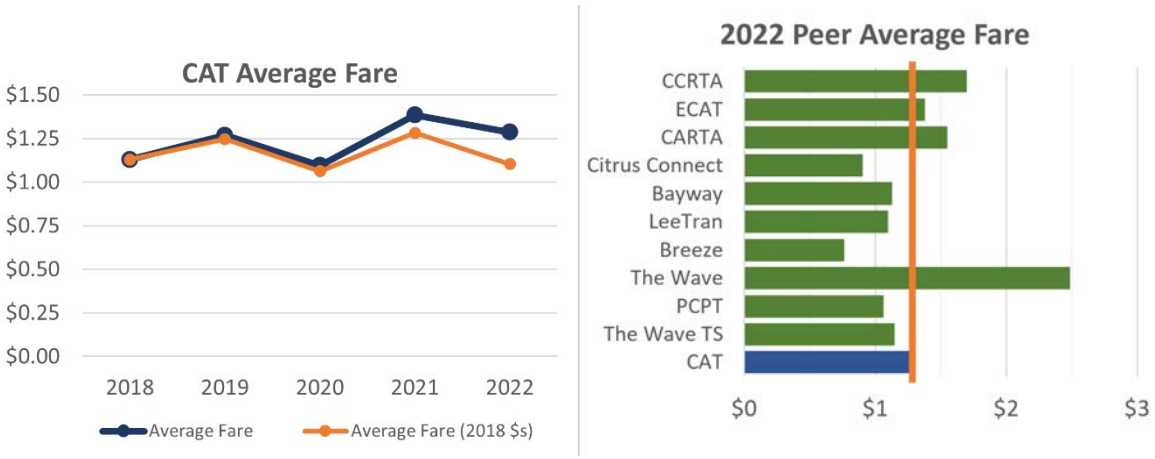


Figure 2-33: 5-year trend (left) and 2022 peer comparison (right) charts for average fare.

2.5.6 KEY FINDINGS

Over the past five years, a clear trend has emerged across most performance measures. From 2018 to 2021, values declined, with the most significant drop occurring between 2019 and 2020, likely due to the onset of the COVID-19 pandemic, which severely impacted the CAT transit system. By 2022, performance measures began to recover, possibly reflecting adaptations by the transit systems to pandemic-related challenges and a gradual return of riders. Rising costs and inflation since the pandemic have likely driven up operating expenses, affecting service delivery. Despite the removal of the last loop for Routes 11, 12, 13, 14, and 17, as per the FY2024 update of the TDP, ridership increased during the peak season between FY23 and FY24.

Overall, the indicators for CAT are mostly below the peer averages. This has different meanings and implications for the various measures. For the general performance measures, it indicates that CAT provides less service and there may be less transit demand compared to other agencies. The charts showed that CAT values were actually quite close to most of the other agencies in the peer group aside from CARTA, LeeTran, and Sarasota Breeze, which are larger transit agencies that serve a larger population size. For the effectiveness measures, CAT values falling lower than the peer average demonstrates that the transit system may not be as effective as other agencies, as the utilization of service is lower. On the other hand, lower than average values for the efficiency measures indicates that CAT is doing better than the peer agencies, as it costs less for CAT to operate per capita, trip, mile, or hour.

In general, the analysis of CAT trends over the years and comparing CAT to other peer agencies helps to identify how CAT is performing in its operations. Seeing how other agencies perform can assist with identifying where CAT can improve its existing system.

3 On-Board Surveys

CAT conducts surveys frequently with a target of every two years to evaluate the existing system and provided service, as well as soliciting suggestions and feedback. Surveys are conducted to better understand the needs and concerns of current users, welcoming CAT riders to provide feedback on how they think service can be improved.

Two recent surveys were developed and conducted to gather information on how the existing system is perceived and what services are in demand. These are the CAT Sticker Survey conducted in November 2022 and the Baseline CAT Survey. The CAT Sticker Survey explores how riders use CAT service and the RideCAT mobile app. The Baseline CAT Survey delves more into the demand of services in addition to service satisfaction. This survey seems to have a lot more responses compared to the previous survey.

The results from these surveys provide a better understanding of the attitudes, habits, and preferences of riders as survey responders indicate their common trip routes and purposes. This helps to show the gaps in the existing transit service and potential for service improvements based on demand.

3.1 Survey Characteristics

The surveys consisted of questions regarding passenger socio-demographics, travel behaviour and characteristics, and rider satisfaction. The gathered information included:

- Socio-demographics:
    - Age
    - Gender
    - Education Attainment
- Travel behaviour and characteristics:
    - Commonly taken bus routes
    - Trip purpose for transit trips
    - Length of time using CAT services
    - Method for receiving service alerts
    - RideCAT mobile app usage
- Rider satisfaction:
    - How well various services meet transportation needs
    - Ease of usage for various services
    - Service improvement importance rankings
    - Cleanliness of transportation infrastructure
    - Overall experience ratings
    - Satisfaction of service

3.2 Passenger Demographic Information

The CAT Sticker Survey asked riders for demographic information including age, gender, and highest level of education attained. From the results, it appears that most of the survey respondents were young adults aged between 21-30, most likely university students. There were a few more male respondents than female respondents. The results can be seen in the following graphs below.

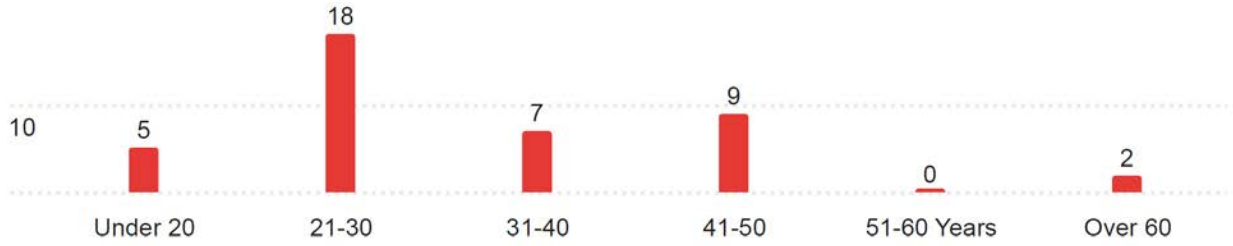


Figure 3-1: Distribution of respondent gender from CAT Sticker Survey responses.



Figure 3-2: Distribution of respondent age from CAT Sticker Survey responses.

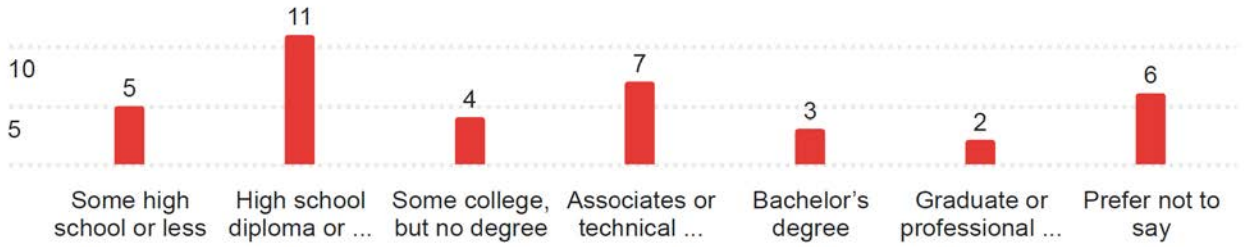


Figure 3-3: Distribution of respondent educational attainment from CAT Sticker Survey responses.

3.3 Passenger Travel Behavior and Characteristics

Survey responders were asked which routes they most commonly ride. The Responders were asked which routes they usually ride, and the results are shown in the graph below. The top routes are the 11, 12, and 19.

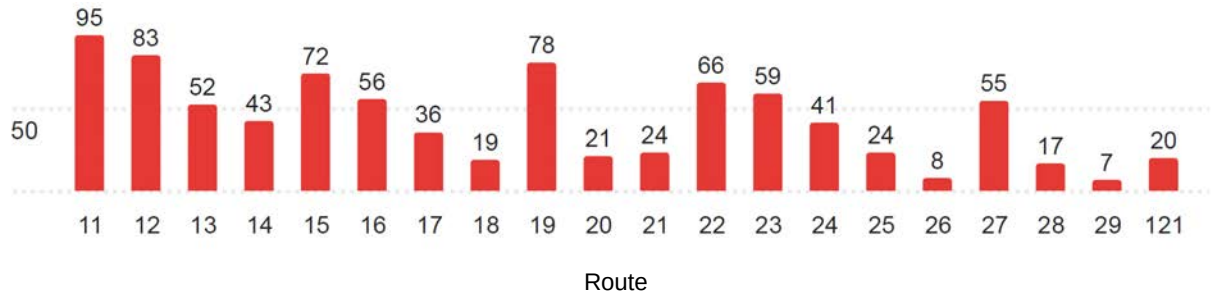


Figure 3-4: Distribution of most taken routes from Baseline CAT survey responses.

Additionally, responders were asked to indicate which destinations they take transit to get to. The top trip purpose for transit trips was to go to work, followed by shopping, and the remaining trip purposes had a fairly even distribution of responses.

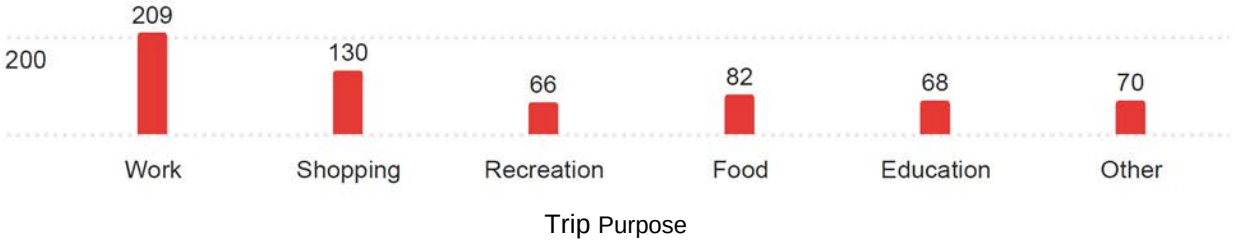


Figure 3-5: Distribution of trip destinations from Baseline CAT Survey responses.

Other survey questions include how long the rider has been a user of CAT and how they receive CAT service alerts. Majority of the survey responders indicated that they have only taken CAT for a year or less (20 responses), many others who were likely tourists were riding CAT for the first time (10 responses), a few had been riding with CAT for over 5 years (7 responses), and very few between 1 to 5 years (5 responses in total). Majority find out about CAT service alerts through the website at rideCAT.com (28 responses), some through rideCAT social media (10 responses), and . These results are shown in the graphs in Figure 3-6 and Figure 3-7 below.



Figure 3-6: Distribution of amount of time riding with CAT from CAT Sticker Survey responses.



Figure 3-7: Distribution of method for receiving service alerts from CAT Sticker Survey responses.

The survey also includes a few questions about the RideCAT mobile app such as if riders are aware of the app, if they use it, or what prevents them from using it. Majority of the responders said that they are aware of the app and use it (38 and 31 respectively), however, 9 were not aware of the app and 17 did not use it. The answers to why the respondents do not use the app include that they did not know about it, do not know how to use it, or just have no need for it.

3.4 Passenger Satisfaction

Survey responders were asked to rate how well different aspects of the service met their transportation needs, overall ease of use for various services, cleanliness of the different transit infrastructure, the service they received, and their overall experience with CAT.

The responses to this question varied between the CAT Sticker Survey and the Baseline CAT Survey. The graph for the CAT Sticker Survey results shows a positive skew where majority were very satisfied and very few were very dissatisfied, as seen in Figure 3-8 below. The graph for the Baseline CAT Survey results in Figure 3-9 shows that most riders just feel neutral about CAT service, many are satisfied with their experience, and an almost equal amount of people are very dissatisfied or very satisfied.

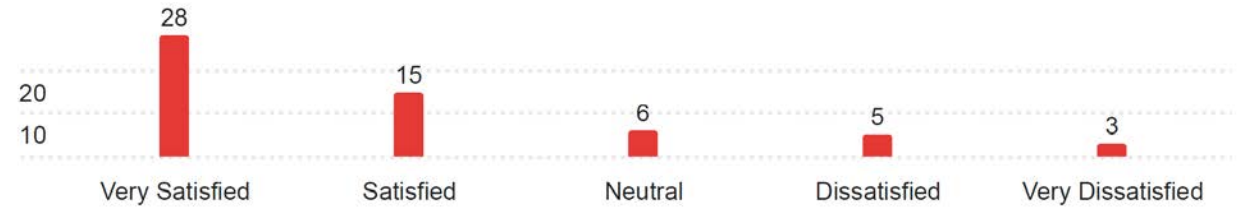


Figure 3-8: Distribution of satisfaction level with CAT service from CAT Sticker Survey responses.

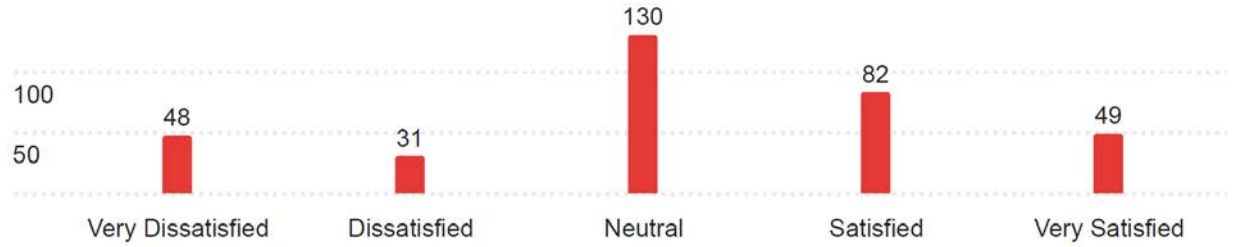


Figure 3-9: Distribution of satisfaction level with CAT service from Baseline CAT Survey responses.

Both surveys also asked how likely the rider would be to recommend CAT services to a friend or colleague. The responses for both surveys followed a similar trend where majority said they would recommend CAT. The results from both surveys are shown in Figure 3-10 and Figure 3-11 below.

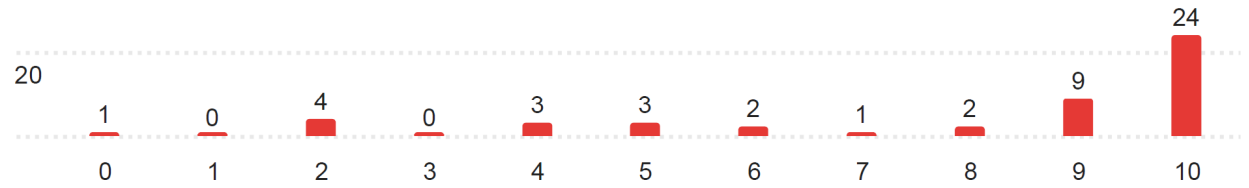


Figure 3-10: Distribution of likeliness to recommend CAT from CAT Sticker Survey responses.

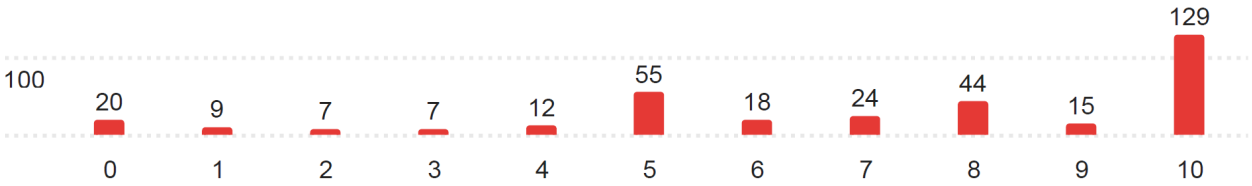


Figure 3-11: Distribution of likeliness to recommend CAT from Baseline CAT Survey responses.

DIVIDER NAME

Appendix A – Peer Selection Methodology

Situational Appraisal – Peer Selection Methodology
Technical Memo No. 1

Date: **July 1, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: **Situational Appraisal – Technical Memo No. 1**

Introduction

The following memorandum is an update to the original peer selection undertaken in 2020 as part of the previous TDP. Updating and re-analyzing past selected agencies as well as being open to adding new agencies are important during the process of selecting relevant and useful peers for comparison, as this allows Collier Area Transit (CAT) to continually improve and compare itself with relevant peers. It is also important that the chosen peers reflect areas and agencies that can be thought of as aspirational to help CAT identify a path forward for improvement. As a result of this process, nine new peers have been selected for consideration.

The peer selection process followed the methodology provided by the Transit Cooperative Research Program (TCRP) Report 141: A Methodology for Performance Measurement and Peer Comparison in the Public Transportation Industry and recommended by the FDOT TDP Handbook (2022). Peer comparisons use selected performance indicators, effectiveness measures, and efficiency measures to illustrate the performance of the CAT fixed route system relative to the peer group. The peer identification methodology and the identified peers are described below.

Best practice typically dictates that a peer group is comprised of eight to ten peers, for the purposes of this TDP, 16 agencies have been selected for the first level assessment. It is crucial to make sure that the right peer agencies are selected to provide credible comparisons that can provide insight and trigger action, compared to badly chosen peers which can produce irrelevant results.

Initial Peer Group

An initial peer group of agencies similar to CAT was formed, and likeness scores were calculated to determine their similarity and appropriateness. For this TDP update, all agencies included in the previous TDP report were retained, along with additional agencies deemed similar to CAT. This initial peer list consisted of 16 transit agencies as shown in the following table:

Table 3-1: Transit System Peer Review Selection

Transit System	**Location**	Peer Description
The M (Montgomery Area Transit)	City of Montgomery, AL	From Previous TDP
TTA (Tri-State Transit Authority)	Huntington, WV	From Previous TDP
The Wave Transit System	City of Mobile, AL	From Previous TDP
ART (Asheville Redefines Transit)	City of Asheville, NC	From Previous TDP
GCT (Gwinnett County Transit)	Lawrenceville, GA	From Previous TDP
PCPT (Pasco County Public Transportation)	New Port Richey, FL	From Previous TDP
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	From Previous TDP
Breeze Transit (Sarasota County Area Transit)	Sarasota, FL	Newly Added
LeeTran (Lee County Transit)	Fort Myers, FL	Newly Added
Bayway (Bay County Transportation)	Pensacola, FL	Newly Added
GoLine (Indian River County)	Vero Beach, FL	Newly Added
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	Newly Added
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	Newly Added
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	Newly Added
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	Newly Added
GTA (Greensboro Transit Authority)	Greensboro, NC	Newly Added

The selection of potential peers was conducted using the peer selection methodology outlined in the FDOT TDP Handbook, employing validated 2022 National Transit Database (NTD) data and the Florida Transit Information System (FTIS). The pool of potential peers consisted of transit agencies located in the southeastern United States, specifically those with coastal characteristics in their geographic profiles.

From the newly identified transit agencies, Breeze Transit (Sarasota, FL), LeeTran (Fort Myers, FL), Bayway (Pensacola, FL), GoLine (Vero Beach, FL), and Citrus Connection (Lakeland, FL) were chosen because they are situated within Florida, either in coastal counties or counties near Collier County. Additionally, CARTA (North Charleston, SC), ECAT (Pensacola, FL), and CCRTA (Hyannis, MA) were selected based on their recommendation as top peers to CAT according to the FTIS Urban iNTD tool. It is worth noting that ART was also recommended but was already included in the previous TDP peer group.

Overview of Methodology

The methodology for selecting the final peer group adheres to the guidelines outlined in the TCRP report. This process involves comparing data values for CAT and potential peer agencies using various indicators to calculate likeness scores for each indicator between CAT and each potential peer agency. The first stage was the primary review, which involved initially selecting indicators and scoring their likeness to CAT, then a comparison was made from the new peers against the previous TDP peers to determine whether the new peer group had a similar likeness and provided a good comparison overall to CAT. A secondary review was initiated to provide further insight to the primary likeness score where 2 new indicators were used. Results were then drawn utilizing the likeness score from the primary review, referencing the secondary review and weighing the location and demographic of the locations to determine the results. This comprehensive approach ensures a robust and well-rounded peer selection process. The methodology recognizes that peers will not be identical in all categories, accommodating variations and allowing for similarity in only a few key categories.

The methodology outlined in the TCRP report identifies 14 indicators for selecting peer agencies, primarily based on demographic characteristics and other exogenous variables, as utilized in the FTIS tool. While adhering to the TCRP guidance for peer selection, our approach slightly diverges in the factors used to assess potential peers. Rather than focusing primarily on exogenous variables, we prioritized various transit system performance measures as the primary criteria for peer selection. These performance indicators were considered more relevant for comparing peers, particularly in the context of enhancing transit system effectiveness. Nonetheless, demographic variables were still integrated into the peer selection process, although greater emphasis was placed on transit performance indicators.

As such, the potential peer agencies were analyzed based on the following 14 indicators: 8 operating characteristics and 6 exogenous variables.

- Operating Characteristic Indicators
    - Vehicles Operated in Maximum Service
    - Annual Passenger Miles Traveled
    - Annual Vehicle Revenue Miles
    - Annual Vehicle Revenue Hours
    - Number of Revenue Vehicles
    - Total Revenue Miles Operated
    - Total Operating Expense
    - Percent Service Demand Response
- Exogenous Variables
    - Service Area Population
    - Service Area Density
    - Service Area
    - Population Density
    - Urban Area Population
    - Population Growth Rate

The selection of these indicators for primary transit peer analysis ensures a comprehensive and robust assessment of both operational performance and contextual factors. Key operational characteristics such as vehicles operated in maximum service, annual passenger miles traveled, and total operating expenses provide critical insights into efficiency, capacity, and financial health within transit operations. Metrics like percent service demand response and annual vehicle revenue hours are essential for evaluating service quality and responsiveness to demand.

Given the growing emphasis on operational efficiency and the increasing adoption of demand response services, the percentage of service demand response serves as a particularly noteworthy indicator. It helps gauge where agencies stand in this evolving process, acknowledging disparities between agencies at different stages of implementing demand-responsive solutions.

Including exogenous variables such as service area population, density, and population growth rate contributes to a comprehensive understanding of the demographic and geographic contexts influencing these transit systems. This holistic approach ensures a well-rounded comparison, capturing both internal performance metrics and external factors that impact transit operations.

To create a chart that scores each category comparing CAT to other transit systems, a likeness score for each factor was calculated. This likeness score is a representation of the difference between two data



values. Data values that are identical between the peer agency and CAT result in a score of 0 (which is very rare and highly unlikely), while a score of 1 represents a percentage difference of 100%, indicating that the value for one agency is twice the amount of the other. In essence, the larger the difference between the values of the agencies, the higher the score, and vice versa. Peer agencies that have larger differences in values should be avoided and are undesirable due to greater dissimilarity between factors, but could still potentially be used with caution after screening for potential prominent differences that could deem them an unsuitable peer.

The likeness score is determined by calculating the percentage differences between the values for CAT and the peer agency, using the following formula:

$$\text{Likeness Score} = \frac{|F_{\text{cat}} - F_{\text{peer}}|}{\max(F_{\text{cat}}, F_{\text{peer}})}$$

Where:

- F_{cat} = the target agency's value for a given factor,
- F_{peer} = the peer agency's value for the same factor, and
- $\max(F_{\text{cat}}, F_{\text{peer}})$ = the maximum of the two values being compared.

As per the scoring guidance provided in the TCRP Report, the likeness scores are rated as such:

- **0.00 – 0.50: Good score**; none or small difference percentages, ideal matches to use
- **0.51 – 0.75: Satisfactory score**; smaller difference percentages, decent matches to use
- **0.76 – 0.99: Mediocre score**; larger difference percentages, could be used but check for anomalies
- **More than 1: Poor score**; large differences percentages, poor match, avoid using if possible

The 2022 data values for each of the 14 indicators and 17 transit agencies including CAT can be found in the data tables attached at the end of the memo, along with the corresponding likeness scores calculated for each indicator and agency. The likeness scores are highlighted according to the score breakdown as previously described, in that the good scores are in green, satisfactory scores are in yellow, decent scores that require more investigation are in orange, and poor scores are in red. This breakdown helps to easily identify which peers are more similar to CAT in which aspects.

Normalizing Cost Data

To accurately reflect cost values, cost data was normalized to reflect the impacts of differences in labor costs between geographical regions. It is important to consider labor cost differences as it allows for conclusions to be drawn with more certainty that the cost differences between agencies are due to internal agency efficiency variances rather than external cost variation. Labor costs are also typically the largest component of an agency's operating costs.

To adjust for differences in labor costs between counties, average labor wage rates were used to recalculate cost data. Annual average weekly wages for 2022 were obtained from the US Bureau of Labor Statistics Quarterly Census of Employment and Wages. All occupation types were included in the average calculation as agencies have no control over general labor environments in the county, which the cost data is being adjusted for, as opposed to the industry-specific labor rates that the agencies have some control



over. Including all occupations also allows for an agency to analyze how much of its labor is spent in comparison to the county's average wages, as well as to adjust its costs to reflect changes in the county's overall cost of living. The peer agencies' cost data was adjusted for labor cost differences by multiplying the labor cost portion of the agencies' operational expense values from NTD by the ratio between Collier's average labor cost over the peer agency county's average labor cost.

Comparison of Results with Previous TDP

As multiple transit systems were analyzed, calculations were performed to assess differences between the previous peer group from the 2020 TDP and the newly added peer agencies. For each potential peer, the sums of the exogenous variables and operating characteristics were calculated separately to identify which peers were most similar to CAT for each of the categories of indicators. An average score was then computed for easier comparison between the peer group from the previous TDP and the new potential peers using the following formula:

$$\text{Total Likeness Score} = \frac{\sum_{i=1}^{n} \text{Factor Likeness Score}_i}{n}$$

Where:

- **Total Likeness Score** = the average score representing overall similarity.
- **Factor Likeness Score** $_i$ = the likeness score for the i-th factor.
- n = the total number of factors.

The results indicated that the newly added peers had a higher average score in operational characteristics compared to the previous TDP peer group. While this suggests that the new peers are less similar to Collier County overall in terms of operational characteristics, it is still a valuable comparison. Focusing on operational characteristics is crucial as they directly impact service delivery and customer satisfaction. Additionally, the new peer group includes 9 peers compared to the 7 in the previous group, which can slightly elevate the average score due to the larger sample size.

Moreover, many of the new peers possess coastal features, which is a significant consideration for Collier County. These similarities in geographic characteristics can provide more relevant insights and best practices tailored to coastal areas. Exogenous factors such as demographics, which are major considerations for the new peer agencies, and operational characteristics such as service delivery modes and vehicle utilization are also critical. Coastal and geographic locations are necessary to consider due to their unique environmental and operational challenges. The exogenous variables for the new peer agencies are relatively low, with an average score of 2.89, indicating closer data values to that of Collier County for these external factors. This is beneficial as it ensures that the newly added peers reflect similar contextual influences, further supporting their relevance. Therefore, despite the higher scores in operational characteristics, the new peer agencies remain a relevant and useful selection for the TDP update.

Table 3-2: Average of Likeness Score Sums by Peer Group

Peer Group	Average for Operating Characteristics	Average for Exogenous Variables	Average for All Indicating Factors
Previous TDP Peers	2.45	3.67	6.99
New Peers Considered	2.87	2.89	5.75

Stage 2 Secondary Screening

A secondary screening of the potential peer group is recommended to fully account for all potential factors and allow for the most comparable peers to be chosen. Two new variables were introduced to the 16 peers: service area type and fare revenue. These secondary factors provide a more nuanced and comprehensive evaluation of transit performance, ensuring that peers are truly comparable in all relevant aspects to CAT.

Service area type significantly impacts performance and influences demand patterns and requirements. Of the eight service area types based on the FDOT TDP Handbook, six were characterized for the 16 peers and are as follows:

- Type 2: Agency provides service to multiple urban areas (may also include non-urban areas) and is the primary service provider within at least one urban area's central city.
- Type 3: Only agency operating within an urban area and has no non-urban service.
- Type 4: Agency is the primary service provider in the urban area's central city, where other agencies also provide service to portions of the urban area. Urban areas with multiple central cities (e.g., Tampa–St. Petersburg) may have more than one type 4 agency.
- Type 5: Agency provides service into an urban area's central city, but its primary service area does not include a central city.
- Type 6: Agency provides service within an urban area but does not provide service to a central city.
- Type 7: Only agency operating within an urban area and also providing non-urban service.

Fare revenue values were evaluated to determine revenue generation, service affordability and accessibility, and subsidy requirements. Comparing agencies with similar fare revenue structures highlights effective fare policies and strategies, ensuring that transit services remain financially sustainable and accessible to the public.

By incorporating service area type and fare revenue as secondary screening factors, the analysis ensures a fair and comprehensive comparison with the primary agency, CAT. This approach helps compare the primary review of the operational characteristic and exogenous variables and identify truly comparable peers and provides a deeper understanding of the factors influencing transit performance, ultimately supporting more informed decision-making for CAT.

Final Peer Group Selection

An initial set of 16 potential peer agencies was identified for CAT (see Table 1-1). From this group, poor comparing peers were filtered out based on the overall likeness scores from the primary review, supplemented by additional likeness scores from the secondary review. In essence, peers with many high scoring factors or higher overall likeness scores were removed as it meant they have less similarity to CAT. 11 peers with the lowest scores in the primary review were selected as the CAT peer group. As shown in the likeness score tables attached at the end of the memo, the potential peers all do fairly well as the majority of the individual factors score well (below 0.5). The exogenous factors appear to compare more poorly in contrast to the operating factors, as there are more satisfactory and mediocre scores. There are very few poor-scoring factory-agency pairs; ART and GTA with poor scores for the percent service demand



response factor, and The M and The Wave Transit System have poor scores for the population growth rate factor. As such, these agencies were removed from the final peer group.

The last data table attached at the end of the memo shows averages and sums of the likeness scores grouped by operational, exogenous, and all factors, as well as by peer group. The likeness scores in each column are formatted in order from the lowest and best scores to the highest and worst scores in a green to red color scale. This table depicts which agencies score better across all factors. Most of the peer agencies from the previous TDP scored poorly for exogenous and all factors. The M, TTA, and ART consistently had poor scores across all groups, and were removed from consideration for the final peer group, along with GCT and PCPT.

The secondary review, which accounted for service area type and fare revenue, was necessary but less significant than operational characteristics, from the primary review, in this TDP. Consequently, if the secondary review led to a substantial increase in the peer likeness score, it was disregarded. This decision was based on the fact that only two indicators were used in the secondary review, making them less critical compared to the primary review.

Subsequently, upon conducting the secondary review, one peer agency was found to have incomplete NTD data. The 2022 NTD data for GoLine was missing the fare revenue information, which is one of the two indicators used in the secondary review. As such, this agency was also eliminated from the final peer group.

The following table lists the final 10 selected peers, their likeness score, and their selection reasoning.

Table 3-3: Average of Likeness Score Sums by Peer Group.

Peer Agency	Likeness Score	Reasoning for Top 10 Selection
Breeze Transit (Sarasota County Area Transit), Sarasota, FL	6.98	Likeness score and location of the peer is desirable.
LeeTran (Lee County Transit), Fort Myers, FL	7.80	Likeness score from the primary review was substantially lower and location of the peer is desirable.
Bayway (Bay County Transportation), Pensacola, FL	6.03	Likeness score and location of the peer is desirable.
ECAT (Escambia County Area Transit Authority), Pensacola, FL	6.05	Likeness score
CCRTA (Cape Cod Regional Transit Authority), Hyannis, MA	6.30	Likeness score
CARTA (Charleston Area Regional Transportation Authority), North Charleston, SC	6.06	Likeness score
Citrus Connection (Lakeland Area Mass Transit District), Lakeland, FL	5.68	Likeness score and location of the peer is desirable.
The Wave (Cape Fear Public Transportation Authority), Wilmington, NC	5.49	Likeness score
The Wave Transit System, City of Mobile, AL	6.81	Likeness score
PCPT (Pasco County Public Transportation), New Port Richey, FL	6.35	Likeness score

It is important to note that three of the selected peers were peers from the previous TDP: The Wave Transit System, PCPT, and The Wave, while the remaining peers are new.

Characteristics of Peer Systems

The following are brief descriptions of the transit agencies in the final new peer group for comparative purposes. The peer and trend analysis were conducted with this set of peers. The data values in the agency profiles were all obtained from NTD 2022 data. The total operating cost values included in these agency profiles are the original cost values from NTD and are not adjusted for labor cost differences. The recalculated operating costs used for likeness scoring can be found in Appendix A. The service type information in the profiles was gathered from each transit agency's respective website.

Baseline Transit Agency: CAT (Collier Area Transit), Naples, FL
Services provided: Fixed-route bus and paratransit services
Service area population (2022): 384,902 people
Service area population density (2022): 172 persons per square mile
Annual revenue hours (2022): 124,701 hours
Annual ridership (2022): 746,338 unlinked trips
Operating costs (2022): $12,194,270
Fleet (2022): 53 vehicles at maximum service

rideCAT
COLLIER AREA TRANSIT

Peer Transit Agency: Breeze Transit (Sarasota County Area Transit), Sarasota, FL
Services provided: Fixed-route bus, trolley, on-demand rideshare, and paratransit services
Service area population (2022): 517,423 people
Service area population density (2022): 848 persons per square mile
Annual revenue hours (2022): 304,917 hours
Annual ridership (2022): 2,080,349 unlinked trips
Operating costs (2022): $27,790,551
Fleet (2022): 107 vehicles at maximum service

Breeze

Peer Transit Agency: LeeTran (Lee County Transit), Fort Myers, FL

Services provided: Fixed-route bus, trolley, ADA paratransit, and transportation disadvantaged services, as well as an employer vanpool program

Service area population (2022): 802,178 people

Service area population density (2022): 978 persons per square mile

Annual revenue hours (2022): 303,204 hours

Annual ridership (2022): 2,231,974 unlinked trips

Operating costs (2022): $28,031,267

Fleet (2022): 91 vehicles at maximum service

Peer Transit Agency: Bayway (Bay County Transportation), Pensacola, FL

Services provided: Fixed-route bus, rideshare, and on-demand services

Service area population (2022): 179,168 people

Service area population density (2022): 236 persons per square mile

Annual revenue hours (2022): 55,418 hours

Annual ridership (2022): 349,281 unlinked trips

Operating costs (2022): $5,098,436

Fleet (2022): 26 vehicles at maximum service

Peer Transit Agency: ECAT (Escambia County Area Transit Authority), Pensacola, FL

Services provided: Fixed-route bus, seasonal trolley, and ADA paratransit services

Service area population (2022): 241,661 people

Service area population density (2022): 1,280 persons per square mile

Annual revenue hours (2022): 156,107 hours

Annual ridership (2022): 842,731 unlinked trips

Operating costs (2022): $13,589,817

Fleet (2022): 86 vehicles at maximum service

Peer Transit Agency: CCRTA (Cape Cod Regional Transit Authority), Hyannis, MA

Services provided: Fixed-route bus, on-demand, ride-hail, seasonal train, reservable medical transportation, and ADA paratransit services

Service area population (2022): 228,996 people

Service area population density (2022): 582 persons per square mile

Annual revenue hours (2022): 178,475 hours

Annual ridership (2022): 605,951 unlinked trips

Operating costs (2022): $17,215,743

Fleet (2022): 133 vehicles at maximum service

Peer Transit Agency: CARTA (Charleston Area Regional Transportation Authority), North Charleston, SC

Services provided: Fixed-route bus, fixed-route shuttle, seasonal shuttle, on-demand, and ADA paratransit services

Service area population (2022): 356,082 people

Service area population density (2022): 2,580 persons per square mile

Annual revenue hours (2022): 230,727 hours

Annual ridership (2022): 2,212,089 unlinked trips

Operating costs (2022): $22,952,085

Fleet (2022): 77 vehicles at maximum service

Peer Transit Agency: Citrus Connection (Lakeland Area Mass Transit District), Lakeland, FL

Services provided: Fixed-route bus, ADA paratransit, and transportation disadvantaged Medicare transportation services

Service area population (2022): 724,777 people

Service area population density (2022): 9,413 persons per square mile

Annual revenue hours (2022): 157,376 hours

Annual ridership (2022): 693,018 unlinked trips

Operating costs (2022): $21,434,610

Fleet (2022): 71 vehicles at maximum service

Peer Transit Agency: The Wave (Cape Fear Public Transportation Authority), Wilmington, NC
Services provided: Fixed-route bus service and mobility assistance program
Service area population (2022): 230,310 people
Service area population density (2022): 1,152 persons per square mile
Annual revenue hours (2022): 102,655 hours
Annual ridership (2022): 710,993 unlinked trips
Operating costs (2022): $8,592,522
Fleet (2022): 43 vehicles at maximum service

Peer Transit Agency: The Wave Transit System, City of Mobile, AL
Services provided: Fixed-route bus service and mobility assistance program
Service area population (2022): 203,900 people
Service area population density (2022): 1,488 persons per square mile
Annual revenue hours (2022): 114,952 hours
Annual ridership (2022): 495,899 unlinked trips
Operating costs (2022): $10,804,979
Fleet (2022): 37 vehicles at maximum service

Peer Transit Agency: PCPT (Pasco County Public Transportation), New Port Richey, FL
Services provided: Fixed-route bus and ADA paratransit services
Service area population (2022): 584,067 people
Service area population density (2022): 782 persons per square mile
Annual revenue hours (2022): 110,773 hours
Annual ridership (2022): 601,717 unlinked trips
Operating costs (2022): $10,599,068
Fleet (2022): 42 vehicles at maximum service

Primary Review Data Values for All Factors and Potential Peers

Indicating Factor Values for Operating Characteristics										
Agency Name	Location	Peer Group	Vehicles Operated in Maximum Service	Annual Passenger Miles Traveled	Annual Vehicle Revenue Miles	Annual Vehicle Revenue Hours	Number of Revenue Vehicles	Total Revenue Miles Operated	Total Operating Expenses	Percent Service Demand Response
CAT (Collier Area Transit)	**Naples, FL**	**Target**	53	6,128,249	2,371,843	124,701	73	$ 2,371,843	$ 12,194,270	58%
The M (Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	25	1,567,963	1,382,282	86,390	28	$ 1,382,282	$ 9,987,208	24%
TTA (Tri-State Transit Authority)	Huntington, WV	Previous TDP	33	3,874,462	1,183,447	70,293	55	$ 1,183,447	$ 6,625,367	30%
The Wave Transit System	City of Mobile, AL	Previous TDP	37	3,380,866	1,605,194	114,952	55	$ 1,605,194	$ 10,804,979	46%
ART (Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	19	4,039,338	1,287,477	100,062	33	$ 1,287,477	$ 10,550,615	0%
GCT (Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	54	10,719,532	2,388,912	134,989	92	$ 2,388,912	$ 22,947,660	9%
PCPT (Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	42	3,564,565	1,852,338	110,773	63	$ 1,852,338	$ 10,599,068	40%
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	43	2,108,293	1,505,790	102,655	65	$ 1,505,790	$ 8,592,522	44%
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	107	10,819,212	4,551,933	304,917	150	$ 4,551,933	$ 27,790,551	69%
LeeTran (Lee County Transit)	Fort Myers, FL	New	91	12,768,415	4,756,395	303,204	141	$ 4,756,395	$ 28,031,267	51%
Bayway (Bay County Transportation)	Pensacola, FL	New	26	2,396,995	752,218	55,418	40	$ 2,202,931	$ 13,589,817	48%
GoLine (Indian River County)	Vero Beach, FL	New	27	5,765,570	1,210,921	71,197	37	$ 1,210,921	$ 5,402,008	48%
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	71	4,147,701	2,372,575	157,376	94	$ 2,372,575	$ 21,434,610	42%
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	New	77	11,394,692	3,152,002	230,727	134	$ 3,152,002	$ 22,952,085	26%
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	New	86	4,610,071	2,202,931	156,107	90	$ 2,202,931	$ 13,589,817	48%
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	New	133	7,170,207	2,826,345	178,475	192	$ 2,826,345	$ 17,215,743	59%
GTA (Greensboro Transit Authority)	City of Greensboro, NC	New	76	9,159,005	3,695,161	257,346	104	$ 3,695,161	$ 27,555,354	0%

Indicating Factor Values for Exogenous Variables								
Agency Name	Location	Peer Group	Service Area	Urban Area Population	Population Density	Population Growth Rate	Service area population	Service area density
CAT (Collier Area Transit)	**Naples, FL**	**Target**	2,025	449,527	1,850	5.60%	348,902	172
The M (Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	135	251,158	1,731	-1.25%	205,764	1,524
TTA (Tri-State Transit Authority)	Huntington, WV	Previous TDP	92	202,754	1,573	1.30%	144,339	1,569
The Wave Transit System	City of Mobile, AL	Previous TDP	137	320,855	1,453	-0.33%	203,900	1,488
ART (Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	45	294,013	1,183	2.88%	93,350	2,074
GCT (Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	143	5,180,179	2,029	1.57%	702,116	4,910
PCPT (Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	747	2,861,173	2,953	2.81%	584,067	782
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	200	268,625	1,888	5.21%	230,310	1,152
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	610	825,572	2,042	5.97%	517,423	848
LeeTran (Lee County Transit)	Fort Myers, FL	New	820	654,405	1,972	9.21%	802,178	978
Bayway (Bay County Transportation)	Pensacola, FL	New	758	398,813	1,519	2.21%	179,168	236
GoLine (Indian River County)	Vero Beach, FL	New	217	186,637	1,759	7.01%	163,662	754
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	77	280,346	1,921	0.87%	724,777	9,413
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	New	138	706,884	2,085	3.23%	356,082	2,580
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	New	189	398,813	1,519	2.21%	241,661	1,280
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	New	394	313,064	917	3.23%	228,996	582
GTA (Greensboro Transit Authority)	City of Greensboro, NC	New	136	338,928	2,050	2.42%	297,878	2,190

Primary Review Likeness Scores for All Factors and Potential Peers

Likeness Score for Operating Characteristics												
Agency Name	Location	Peer Group	Vehicles Operated in Maximum Service	Annual Passenger Miles Traveled	Annual Vehicle Revenue Miles	Annual Vehicle Revenue Hours	Number of Revenue Vehicles	Total Revenue Miles Operated	Total Operating Expenses	Percent Service Demand Response	Average Operational Likeness Score	Total Operational Likeness Score
CAT (Collier Area Transit)	**Naples, FL**	**Target**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
The M (Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	0.53	0.74	0.42	0.86	0.62	0.42	0.11	0.59	0.53	2.59
TTA (Tri-State Transit Authority)	Huntington, WV	Previous TDP	0.38	0.37	0.50	0.82	0.25	0.50	0.37	0.48	0.46	2.93
The Wave Transit System	City of Mobile, AL	Previous TDP	0.30	0.45	0.32	0.89	0.25	0.32	0.05	0.21	0.35	2.04
ART (Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	0.64	0.34	0.46	0.88	0.55	0.46	0.13	1.00	0.56	3.47
GCT (Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	0.02	0.43	0.01	0.91	0.21	0.01	0.47	0.85	0.36	2.44
PCPT (Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	0.21	0.42	0.22	0.89	0.14	0.22	0.01	0.31	0.30	1.78
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	0.19	0.66	0.37	0.88	0.11	0.37	0.28	0.24	0.39	1.87
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	0.50	0.43	0.48	0.59	0.51	0.48	0.57	0.16	0.47	3.72
LeeTran (Lee County Transit)	Fort Myers, FL	New	0.42	0.52	0.50	0.59	0.48	0.50	0.60	0.12	0.47	3.73
Bayway (Bay County Transportation)	Pensacola, FL	New	0.51	0.61	0.68	0.56	0.45	0.07	0.11	0.17	0.39	3.16
GoLine (Indian River County)	Vero Beach, FL	New	0.49	0.06	0.49	0.43	0.49	0.49	0.56	0.17	0.40	3.18
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	0.25	0.32	0.00	0.21	0.22	0.00	0.50	0.28	0.22	1.78
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	New	0.31	0.46	0.25	0.46	0.46	0.25	0.47	0.55	0.40	3.21
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	New	0.38	0.25	0.07	0.20	0.19	0.07	0.17	0.17	0.19	1.50
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	New	0.60	0.15	0.16	0.30	0.62	0.16	0.30	0.02	0.29	2.30
GTA (Greensboro Transit Authority)	City of Greensboro, NC	New	0.30	0.33	0.36	0.52	0.30	0.36	0.06	1.00	0.40	3.22

Likeness Score for Exogenous Variables

Agency Name	Location	Peer Group	Service Area	Urban Area Population	Population Density	Population Growth Rate	Service area population	Service area density	Average Exogenous Likeness Score	Total Exogenous Likeness Score
CAT (Collier Area Transit)	**Naples, FL**	**Target**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
The M (Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	0.93	0.44	0.06	1.22	0.41	0.89	0.66	3.96
TTA (Tri-State Transit Authority)	Huntington, WV	Previous TDP	0.95	0.55	0.15	0.77	0.59	0.89	0.65	3.90
The Wave Transit System	City of Mobile, AL	Previous TDP	0.93	0.29	0.21	1.06	0.42	0.88	0.63	3.79
ART (Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	0.98	0.35	0.36	0.49	0.73	0.92	0.64	3.82
GCT (Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	0.93	0.91	0.09	0.72	0.50	0.96	0.69	4.12
PCPT (Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	0.63	0.84	0.37	0.50	0.40	0.78	0.59	3.53
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	0.90	0.40	0.02	0.07	0.34	0.85	0.43	2.58
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	0.70	0.46	0.09	0.06	0.33	0.80	0.41	2.43
LeeTran (Lee County Transit)	Fort Myers, FL	New	0.60	0.31	0.06	0.39	0.56	0.82	0.46	2.75
Bayway (Bay County Transportation)	Pensacola, FL	New	0.63	0.11	0.18	0.61	0.49	0.27	0.38	2.28
GoLine (Indian River County)	Vero Beach, FL	New	0.89	0.58	0.05	0.21	0.53	0.77	0.51	3.04
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	0.96	0.38	0.04	0.85	0.52	0.98	0.62	3.72
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	New	0.93	0.36	0.11	0.42	0.02	0.93	0.46	2.79
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	New	0.91	0.11	0.18	0.61	0.31	0.87	0.50	2.98
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	New	0.81	0.30	0.50	0.42	0.34	0.70	0.51	3.09
GTA (Greensboro Transit Authority)	City of Greensboro, NC	New	0.93	0.25	0.10	0.57	0.15	0.92	0.48	2.91

Agency Name	Location	Peer Group	Average Operational Likeness Score	Sum of Operational Likeness Scores	Average of Operational Sum by Peer Group	Average Exogenous Likeness Score	Sum of Exogenous Likeness Scores	Average of Exogenous Sum by Peer Group	Average Likeness Score for All Factors	Total Sum of Likeness Score for All Factors	Average of Total Sum by Peer Group
CAT (Collier Area Transit)	**Naples, FL**	**Target**	0	0	0	0	0	0	0	0	0
The M (Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	0.53	2.59		0.66	3.96		0.59	8.24	
TTA (Tri-State Transit Authority)	Huntington, WV	Previous TDP	0.46	2.93		0.65	3.90		0.54	7.57	
The Wave Transit System	City of Mobile, AL	Previous TDP	0.35	2.04		0.63	3.79		0.47	6.59	
ART (Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	0.56	3.47	2.45	0.64	3.82	3.67	0.59	8.27	7.04
GCT (Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	0.36	2.44		0.69	4.12		0.50	7.01	
PCPT (Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	0.30	1.78		0.59	3.53		0.42	5.94	
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	0.39	1.87		0.43	2.58		0.40	5.67	
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	0.47	3.72		0.41	2.43		0.44	6.16	
LeeTran (Lee County Transit)	Fort Myers, FL	New	0.47	3.73		0.46	2.75		0.46	6.48	
Bayway (Bay County Transportation)	Pensacola, FL	New	0.39	3.16		0.38	2.28		0.39	5.44	
GoLine (Indian River County)	Vero Beach, FL	New	0.40	3.18		0.51	3.04		0.44	6.22	
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	0.22	1.78	2.87	0.62	3.72	2.89	0.39	5.51	5.75
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	New	0.40	3.21		0.46	2.79		0.43	5.99	
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	New	0.19	1.50		0.50	2.98		0.32	4.48	
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	New	0.29	2.30		0.51	3.09		0.38	5.39	
GTA (Greensboro Transit Authority)	City of Greensboro, NC	New	0.40	3.22		0.48	2.91		0.44	6.13	

A.1 Heading 2

A.1.1 HEADING 3

Alternative Analysis
Technical Memo No. 2

Date: **August 1, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: **Alternative Analysis – Technical Memo No. 2 - Action Required**

Your review of the attached Alternative Analysis is requested.

Table of Contents

1 TRANSIT DEMAND ANALYSIS 1
1.1 Discretionary Market Assessment 1
1.2 Traditional Market Assessment 5
1.3 Potential Future Transit Demand using T-Best 7
1.3.1 Model Inputs/ Assumptions and Limitations 7
1.3.2 Potential Future Transit Demand Results 8
1.3.3 Potential Transit Demand Analysis 9
1.4 Gap Analysis Overview 9

2 ALTERNATIVE DEVELOPMENT AND EVALUATION 12
2.1 Development of Alternatives 12
2.2 Service improvements 14
2.2.1 Improvements to existing Routes 14
2.2.2 New Service 15
2.2.3 Mobility-on-demand (MOD) 17
2.2.4 Other Improvements 20
2.3 Evaluation of Alternatives 20
2.3.1 Alternatives evaluation methodology 20

LIST OF TABLES

Table 1-1: Transit Service Density Thresholds 1
Table 2-2: Alternatives Evaluation Measures 21
Table 2-3: Alternatives Evaluation Scoring Thresholds 23

LIST OF MAPS

Map 1-1: 2026 Density Threshold Assessment 3
Map 1-2: 2036 Density Threshold Assessment 4
Map 1-3: Transit Propensity Score 6
Map 1-4: Gap Analysis 11
Map 2-1: Proposed Transit Network 13
Map 2-2: MOD Zones 19

1 Transit Demand Analysis

A key part of the CAT TDP is comparing the current transit service with the two main rider markets: the discretionary market and the traditional market. The discretionary market is analyzed using a Density Threshold Assessment (DTA), while the traditional market is evaluated through a Transit Propensity Score. Ridership projections are calculated using T-BEST. These tools help determine whether the existing transit routes effectively serve areas with characteristics supportive of transit. This section explains how these tools identify service gaps, which will guide future adjustments or new services.

1.1 Discretionary Market Assessment

The discretionary market pertains to potential passengers residing in densely populated regions within the service area who may opt for transit as a commuting or transportation option but have other alternatives available to fulfill their mobility requirements. While discretionary markets may not be representative of the typical CAT rider, it is crucial to pinpoint areas with higher population density that could attract other markets like choice riders. Following this section is a demand evaluation of the traditional transit market. The DTA carried out for CAT used industry-standard benchmarks to identify regions in the CAT service area that exhibit transit-friendly levels of residential and employee density. Three density thresholds were set to evaluate whether an area has enough population or employment density to support fixed-route transit services. The analysis categorizes areas into three levels of transit investment: Minimum, High, or Very High, based on their ability to sustain different levels of service.

- **Minimum Investment** – reflects minimum dwelling unit or employment densities to consider basic fixed-route transit services (i.e., local fixed-route bus service).
- **High Investment** – reflects increased dwelling unit or employment densities that may be able to support higher levels of transit investment (i.e., increased frequencies, express bus) than areas meeting only the minimum density threshold.
- **Very High Investment** – reflects very high dwelling unit or employment densities that may be able to support higher levels of transit investment (i.e., premium transit services) than areas meeting the minimum or high-density thresholds.

Table 1-1: Transit Service Density Thresholds

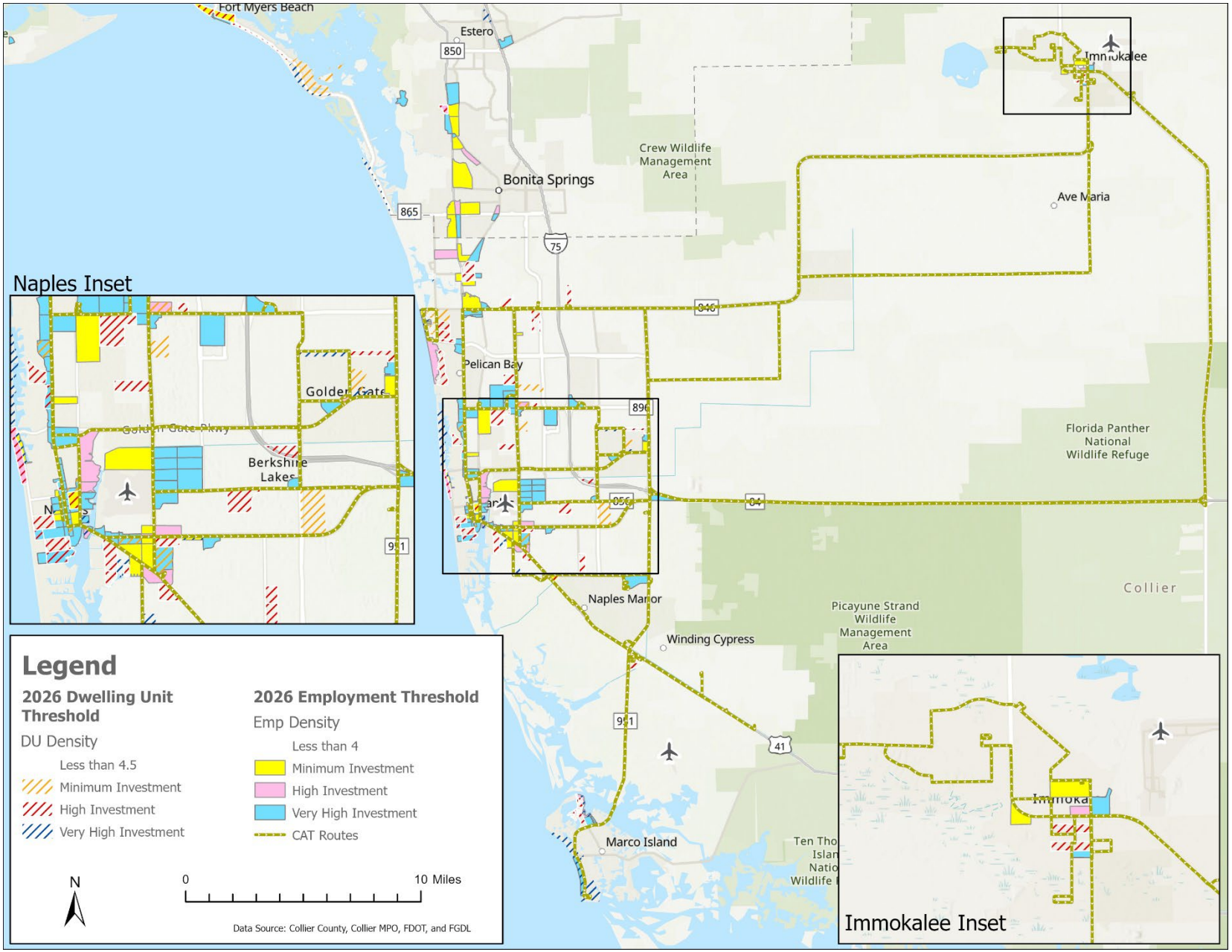
Level of Transit Investment	Dwelling Unit Density Threshold	Employment Density Threshold
Minimum Investment	4.5-5 Dwelling units/ acre	4 employees/acre
High Investment	6-7 Dwelling units/ acre	5-6 employers/acre
Very High investment	>8 Dwelling units/ acres	>7 Employees/acre

Map 1-1 visualizes the results of the 2026 DTA analysis, indicating that the employment-based discretionary transit market is concentrated in areas throughout the CAT service area. Major concentrations of employment-related transit investments are found both east and west of Naples Airport,

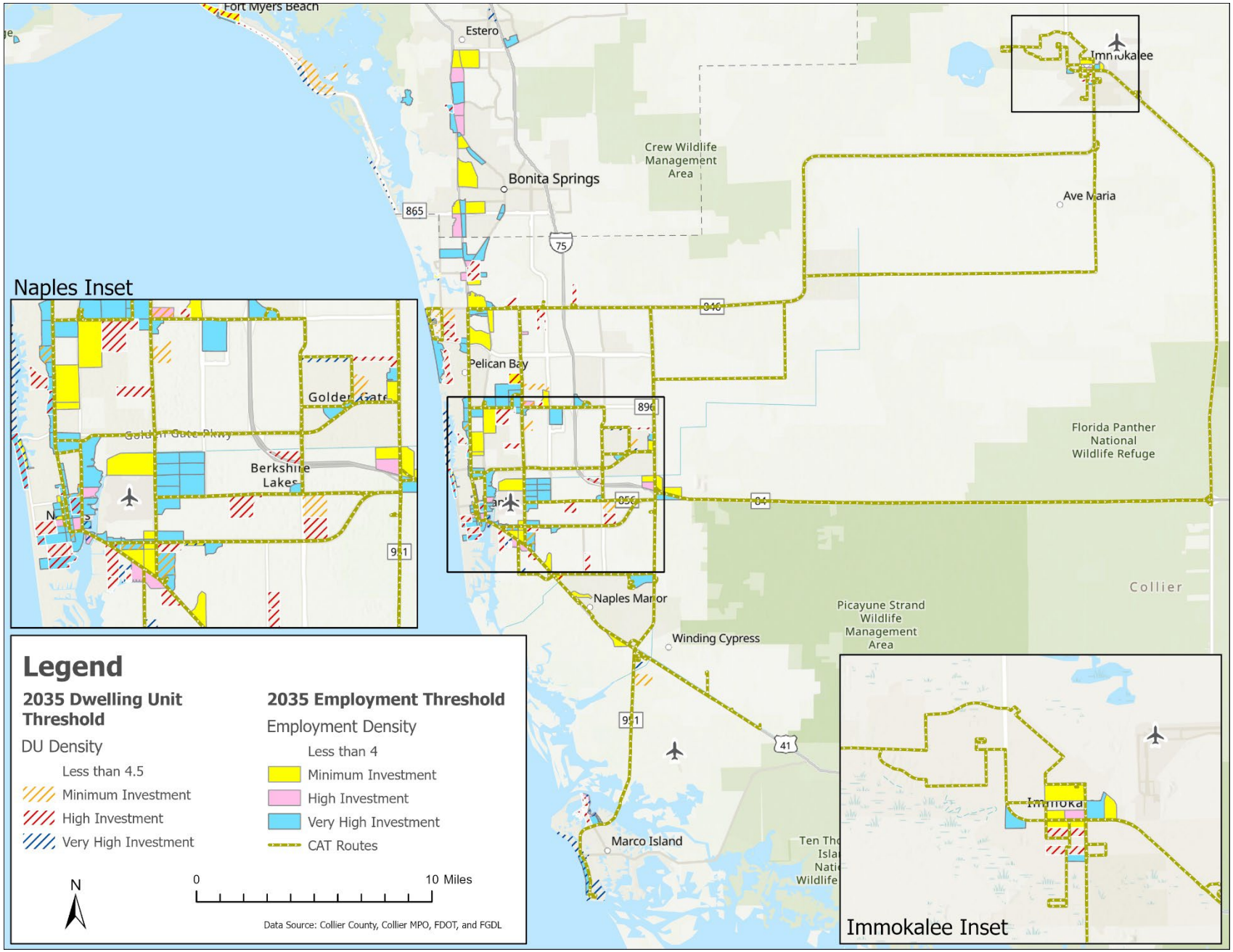
as well as around Pine Ridge Road and US 41. Other areas of “High” to “Very High” employment-related transit investments are located along Tamiami Trail.

Household unit-based discretionary areas with transit investment opportunities are fewer but follow the same densities as employment-based discretionary areas. The areas that meet or surpass the “High” threshold are located along the coastal area which includes the City of Naples, Marco Island, north of Pine Ridge Road, south of Pine Ridge Road, along US 41, around Immokalee Road west of Logan Boulevard, and in Immokalee west of 846.

Map 1-2 displays the results of the 2035 DTA, which closely resemble the 2026 discretionary transit markets but with projected growth in specific areas. Notable growth is expected along the Naples coast, in Immokalee, south of the US 41 and Collier Boulevard intersection, and in areas adjacent to those already meeting the minimum transit investment threshold. Areas with a "High" to "Very High" employment-based discretionary transit market are concentrated near the airport, along Davis Boulevard, Pine Ridge Road, Goodlette-Frank Road, US 41 in Bonita Springs and Naples, the coastal areas of North Naples and Marco Island, around SR 29 in Immokalee, and near Collier Boulevard and I-75.



Map 1-1: 2026 Density Threshold Assessment



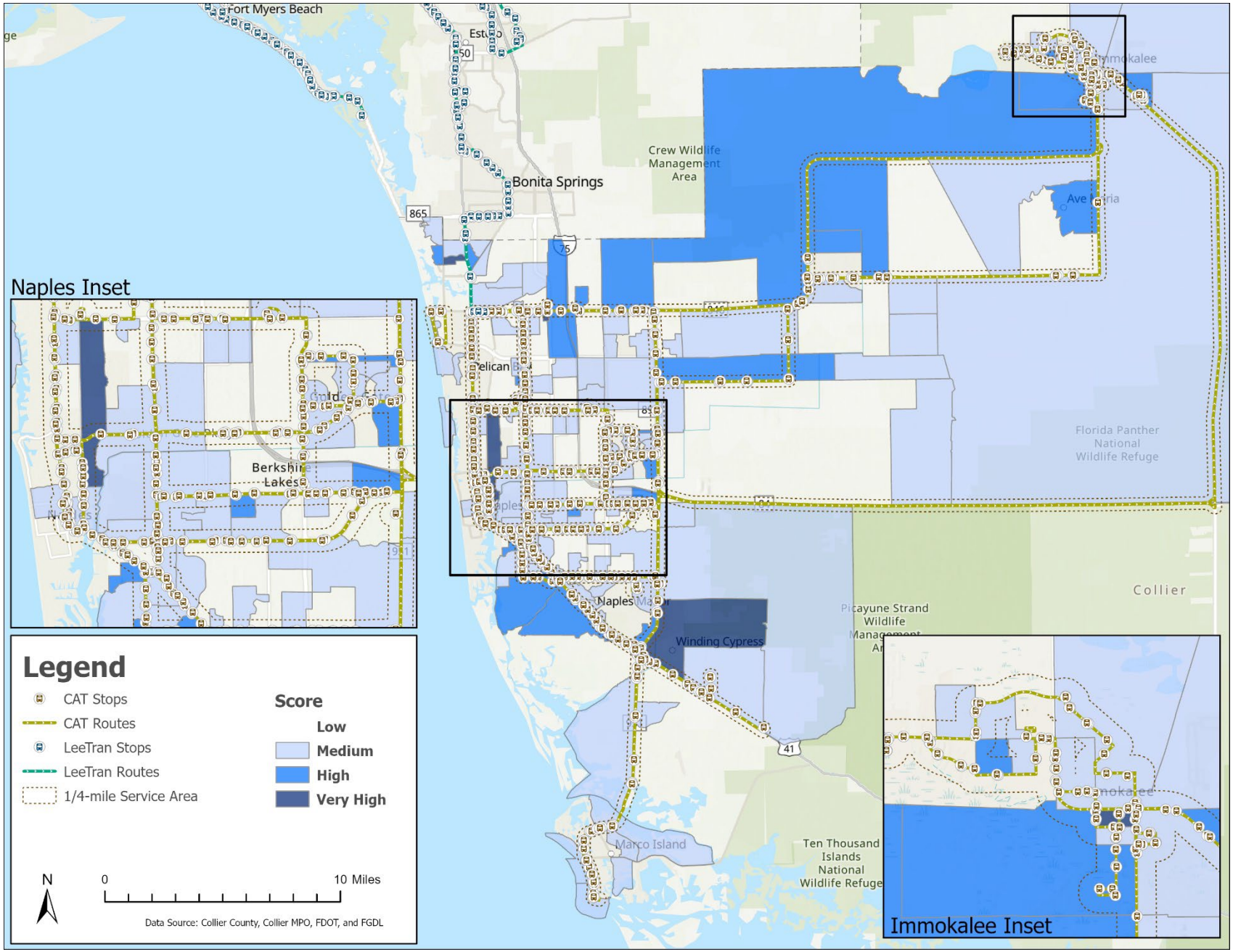
Map 1-2: 2036 Density Threshold Assessment

1.2 Traditional Market Assessment

For the traditional market assessment, four demographics were used to measure transit usage propensity: young teenagers, elderly, poverty, and households with no vehicles. These American Community Survey (ACS) data layers were overlaid to develop a composite ranking for each Census Block Group of “Very High,” “High,” “Medium,” and “Low” with respect to the level of propensity to use transit. **Map 1-3** illustrates this analysis, showing areas with varying market potential. The existing transit network is added to show how well CAT is covering these areas.

The CAT service area includes Census Block Groups with significant transit-dependent populations. Areas north-west of Naples airport, east of Collier Boulevard near US 41 and near Lee County show “High” and “Very High” transit propensity scores due to higher concentrations of older adults, youths, younger adults, and households in poverty. In addition, block groups in Immokalee also show “High” to “Very High” transit propensity scores, with data indicating high concentrations of zero-vehicle households, older adults, youths, and younger adult populations.

It's important to recognize that some low-density suburban and rural areas, especially around Immokalee, may be classified as having "High" or "Very High" transit propensity. However, this does not necessarily indicate a strong need for traditional fixed-route service. These areas might be better served by on-demand transit options instead.



Map 1-3: Transit Propensity Score

1.3 Potential Future Transit Demand using T-Best

Forecasting transit demand is a critical aspect of transportation planning and Rule 14-73.001, F.A.C., specifically states that an FDOT-approved transit demand estimation technique/software must be used to estimate the current and potential 10-year transit demand. The projections were prepared using T-BEST (Transit Boardings Estimation and Simulation Tool) Version 4.8, the FDOT-approved ridership estimation software for the following scenarios:

- "2026 – No Improvements" – projects ridership demand to 2026 with the current transit system
- "2035 – No Improvements" – projects ridership demand to 2035 with the current transit system

T-BEST is a transit analysis and ridership-forecasting model capable of estimating travel demand at the route level. The program was developed to offer accurate forecasts of transit ridership in the near and mid-term, aligning with the requirements of transit operational planning and TDP development. When generating model outputs, T-BEST also takes into account transit network connectivity, service frequency, distance between stops, and time of day.

The following section discusses the inputs, assumptions, scenario details, and summarizes the ridership forecasts.

1.3.1 MODEL INPUTS/ ASSUMPTIONS AND LIMITATIONS

T-BEST uses a combination of demographic information and transit network data for its modeling inputs. The assumptions and inputs used in developing the regionally significant routes in T-BEST are outlined below. The regional model is based on the T-BEST Land Use Model structure (T-BEST Land Use Model 2023), which is backed by parcel-level data sourced from the Florida Department of Revenue (DOR) statewide tax database. It is important to highlight that the model does not interact with roadway network conditions. As a result, ridership predictions will not reflect changes in roadway traffic conditions, speeds, or roadway connectivity.

1.3.1.1 Transit Network

- The transit route network was designed to reflect 2024 conditions, the model's validation year. CAT staff created the base transit system using General Transit Feed Specification (GTFS) data, which included: Route alignments
- Route patterns
- Bus stop locations
- Service spans
- Existing headways during peak and off-peak periods (frequency at which a bus arrives at a stop—e.g., one bus every 60 minutes)

The GTFS data were verified to ensure the most recent bus service spans and headways, and edits were made as needed.



1.3.1.2 Socioeconomic Data

The socioeconomic data used as the base input for the T-BEST model were derived from District 1 Regional Planning Model version 2 (D1RPM v2) and ACS 5-Year Estimates. Using the data inputs listed above, the model captures market demand (population, demographics, employment, and land use characteristics) within ¼-mile radius of each transit stop.

T-BEST uses a socioeconomic data growth function to project population and employment data. Using 2045 socioeconomic forecasts from the D1RPM v2, population and employment growth rates were applied at a Traffic Analysis Zone (TAZ) level. Population and employment data are hard coded into the model and cannot be modified by end-users. As applied, the growth rates do not reflect fluctuating economic conditions as experienced in real time.

1.3.1.3 T-BEST Model Limitations

It should be emphasized that while T-BEST offers ridership projections at the route and bus stop levels, its primary value lies in comparisons of route productivity. The output from T-BEST should not be seen as exact predictions of ridership numbers. Instead, it should be used to compare and assess different routes to guide decisions about actual service implementation. Always apply solid planning judgment and experience when interpreting T-BEST results.

1.3.2 POTENTIAL FUTURE TRANSIT DEMAND RESULTS

The T-BEST model was validated using the inputs, assumptions, and ridership data at the route level from February 2024. Building upon this validation model, ridership forecasts for the TDP Major Update's planning start year of 2026 and the horizon year of 2035 were established. These annual ridership forecasts indicate the anticipated level of service usage, assuming no modifications are made to any of the fixed-route services, in accordance with F.A.C. Rule 14-73.001. **Table 1-2** presents the projected demand in terms of the number of annual riders by route for the years 2026 and 2035, along with the ridership growth rates for the period from 2026 to 2035, as derived from the T-BEST model.

Table 1-2: Potential Demand and Growth Rates with No Improvements, 2026–2035

Route	2026 Average Annual Ridership	2035 Average Annual Ridership	2026–2035 Absolute Change	2026–2035 Average Growth Rate
11	133,083	149,106	16,023	12.04%
12	71,636	78,108	6,472	9.03%
13	53,944	60,451	6,507	12.06%
14	45,155	50,810	5,655	12.52%
15	87,628	95,448	7,820	8.92%
16	50,935	55,304	4,369	8.58%
17	28,256	31,430	3,174	11.23%
19	112,352	126,605	14,253	12.69%
20	23,402	25,700	2,298	9.82%
21	13,261	15,289	2,028	15.29%
22	35,986	40,281	4,295	11.94%
23	27,832	31,491	3,659	13.15%
24	97,743	109,635	11,892	12.17%
25	22,957	25,820	2,863	12.47%
27	39,467	45,354	5,887	14.92%
29	25,696	29,195	3,499	13.62%
121	26,731	32,181	5,450	20.39%
Totals	**896,064**	**1,002,208**	**106,144**	**11.85%**

1.3.3 POTENTIAL TRANSIT DEMAND ANALYSIS

Based on the T-BEST model results shown in Table 1-2, demand for transit will experience a moderate increase for all routes over time, particularly for routes 21, 23, 27, 29 and 121. According to the projections, overall average annual ridership is expected to increase by 11.85% by 2035, an annual growth rate of about 1.7%. The model results show that the most significant absolute increase in demand in the network will occur within the next 10 years on routes 11, 19, and 24.

In order to boost Collier County's transit market share, it is essential to strategically implement a combination of service efficiency and expansion in areas experiencing growth. The service enhancements outlined in this plan, along with other transit planning initiatives and the input received from the public, will collectively result in improved transit services for the area.

1.4 Gap Analysis Overview

The gap analysis is an evaluation process that compares existing service coverage to potential need using the traditional market assessment analysis results. Itaims to identify geographical gaps in public transit where transit needs are high but service is insufficient.

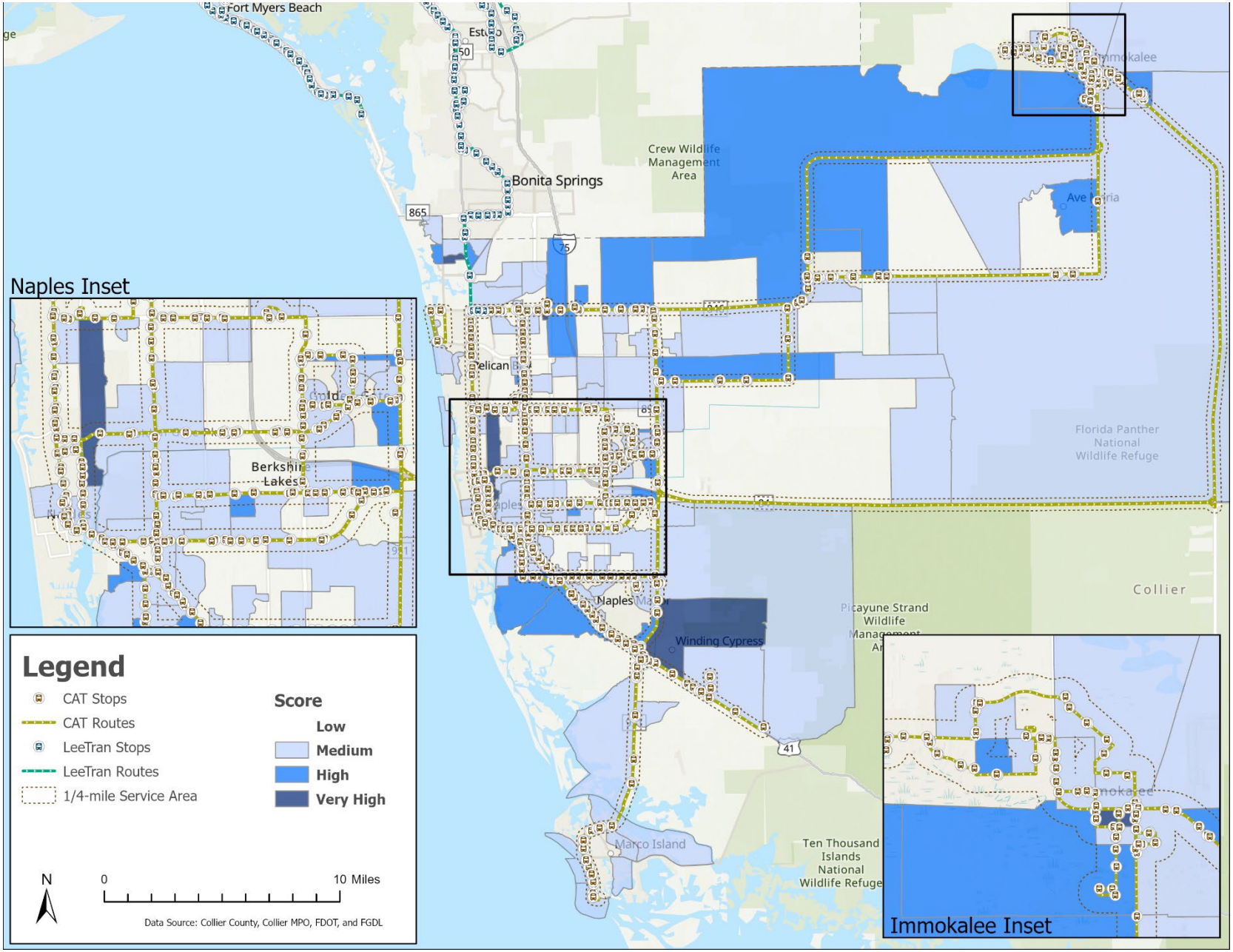
The gap analysis involves a visual overlay comparison of the “High” and “Very High” transit propensity Census block groups from the traditional market assessment and a ¼-mile buffer of existing transit network along with stops. Any of the “High” and “Very High” areas that aren’t covered by the buffer are



considered to be potential gaps in transit service. After these potential gaps are determined, more detailed analysis is performed. Some of these census block groups are large and unevenly proportioned, so an assessment is performed using aerial photography to verify if the gap has land uses and density to support transit service.

As shown in **Map 1-4**, areas that noticeably may have the potential for being underserved are located west and east of US-41 but south of Bonita Beach Road. Other major areas that are underserved include North Naples, Immokalee, Collier Boulevard between Rattlesnake Hammock Road and Radio Road and areas east of Goodlette-Frank Road.

Following the completion of the gap analysis, service planning was implemented to formulate strategies aimed at addressing the identified service deficiencies, particularly in regions with elevated transit propensity scores. CAT has various alternatives for addressing specific service gaps, which may involve alterations to current routes, such as modifying route alignments, adjusting service spans, increasing service frequencies, and employing MOD strategies.



Map 1-4: Gap Analysis

2 Alternative Development and Evaluation

This section identifies potential transit improvements, also known as transit alternatives, for CAT's 10-year TDP. The proposed improvements represent the transit needs for the next 10 years and were developed without considering funding constraints.

The identified service improvements were prioritized using an evaluation process that considers input from the community and technical analyses that identified transit gaps. The resulting prioritized list of improvements will be used to develop the 10-year implementation and financial plans.

As Collier County and the communities within the county continue to grow, these prioritized transit needs will assist CAT in selecting and implementing service improvements as funding becomes available.

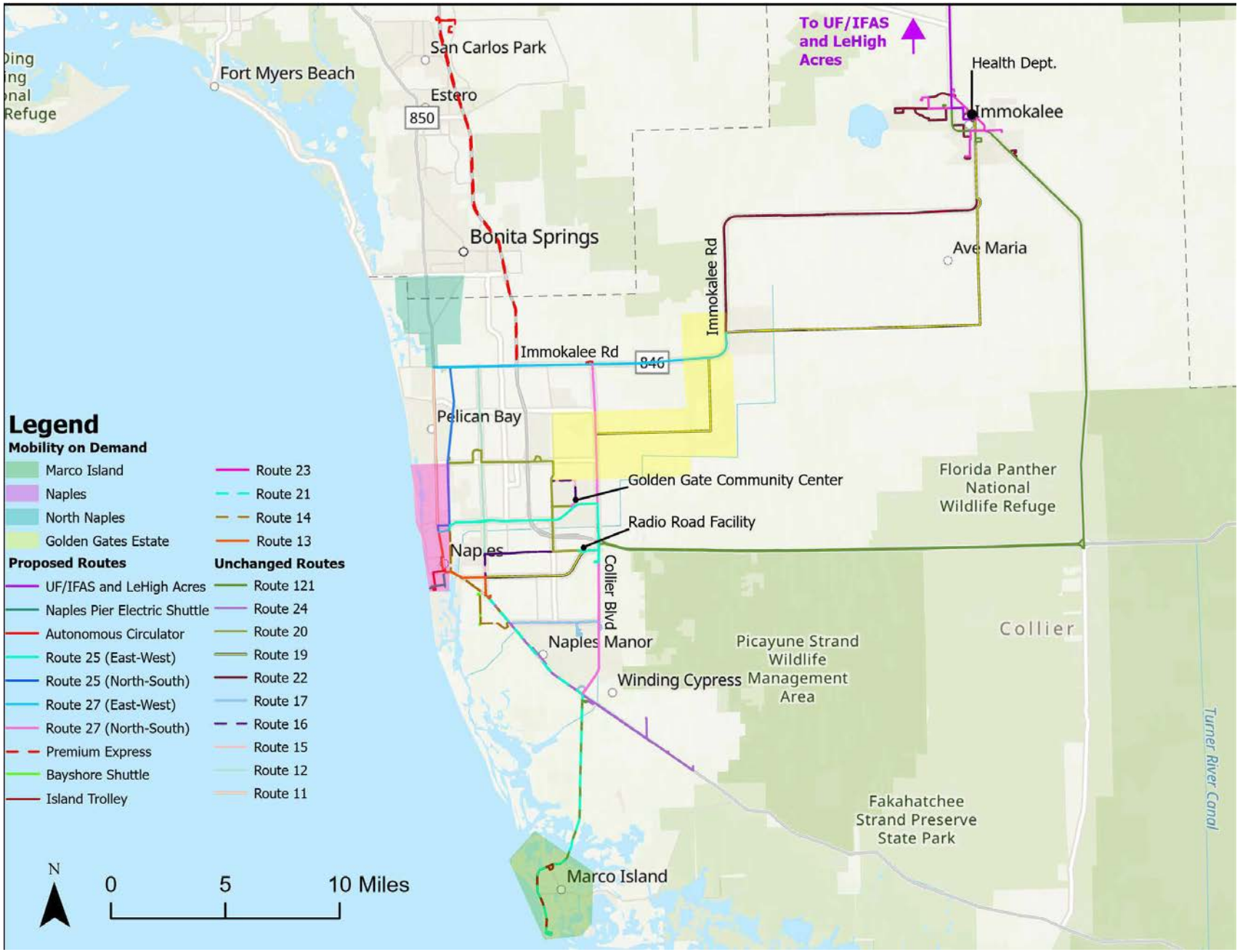
2.1 Development of Alternatives

The transit alternatives proposed for CAT 2026-2035 TDP aim to enhance current CAT services and extend transit coverage to previously unserved areas. These alternatives are designed to address the community's transit requirements and have been formulated using data collected through public outreach, the transit demand assessment presented herein, and the Situational Appraisal (Tech Memo #1 of this TDP update effort).

The identified alternatives have been categorized into three distinct groups based on these methodologies:

- Service Improvements
- Capital/Infrastructure
- Policy/Other

Specific improvements identified in each category are summarized in the following section and provides additional detail regarding the development and envisioned service of the alternatives. **Map 2-1** shows the proposed network.



Map 2-1: Proposed Transit Network

2.2 Service improvements

Enhancements to service encompass improvements to current routes concerning network design, frequency, extended operational hours, and/or the addition of service days. This category further includes the expansion of services, which involves the introduction of new routes or modes.

2.2.1 IMPROVEMENTS TO EXISTING ROUTES

There is a significant need to extend service hours and increase the frequencies of current bus routes. The necessary improvements and enhanced efficiencies for the existing fixed-route network are as follows:

2.2.1.1 Frequency Improvements

The following headways are proposed to improve service efficiency:

- Route 13: Reduce headway from 60 minutes to 40 minutes (includes realignment)
- Route 15: Reduce headway from 90 minutes to 45 minutes
- Route 16: Reduce headway from 90 minutes to 45 minutes
- Route 14: Reduce headway from 60 minutes to 30 minutes
- Route 11: Reduce headway from 90 minutes to 45 minutes
- Route 12: Reduce headway from 90 minutes to 45 minutes
- Route 23: Reduce headway from 60 minutes to 40 minutes (includes realignment)
- Route 121: Add one additional trip in the AM and one in the PM

2.2.1.2 Span Improvements (Later Service)

Based on results from the on-board survey, there is a clear priority for adding later service. It is proposed to extend service hours for the following routes: 11, 13, 14, 17, 19, and 24. The recommendation is to extend service until 10:00 PM, contingent upon available funding and service demand.

2.2.1.3 Realign Routes

To enhance service efficiency, reduce network redundancy, improve travel times, and simplify route information, the following route and network improvements are proposed.The objective of these recommendations is to streamline the route and network structure while being better to accommodate the anticipated population and employment growth identified in the Baseline Conditions. The route extensions and realignments work in tandem with other route improvements, and several route pairs proposed below combine separate one-directional routes to serve as single bidirectional routes. The proposed changes include:



- **Realign Routes 13 and 14** – Currently operating as a one-way pair, Routes 13 and 14 will be restructured into two bidirectional routes. This change will simplify the routes for riders and improve frequency on the shorter Route 13. The routes would operate between Coastland Center and the Government Center. Route 13 would operate along 9th Street/Tamiami Trail to Davis Blvd to the Government Center every 40 minutes. Route 14 would operate along Goodlette-Frank Road to Tamiami Trail to Bayshore Dr to Thomason Dr to Tamiami Trail north to the Government Center. The realignment will shorten Route 13 making its headway 40 minutes while the Route 14 would continue to operate every 60 minutes.

- **Marco Island Government Center Express (Route 21**) – This route would provide express service from Marco Island to the Walmart Supercenter on Collier Boulevard and to the Government Center. It provides a convenient connection at the Government Center to Marco Island for the majority of the routes in the CAT network. Riders would be able to access the express route on Marco Island using the proposed Marco Island MOD service and the Island Trolley, as discussed in the following section.

- **Route 23** – This proposed route would realign Route 23 to provide direct connections between residential areas to several destinations while expanding the service area. The route would connect the westernmost residential cluster on Lake Trafford Road to the County Health Department, several packing houses along New Harvest Road, and finally to the easternmost residential cluster on Farm Worker Way. A deviation to provide service to the Roberts Center should be considered as an alternative alignment.

- **Split and extend Routes 25 and 27** – Routes 25 and 27 provide service in both the north-south and east-west directions. To create a more grid-like network, close gaps in transit service, simplify navigation for riders, and to better accommodate employment growth along Collier Boulevard and Immokalee Boulevard, it is proposed that the routes be split where they change directions and extend them to provide better connectivity to key destinations and other routes.

    - The new Route 25 North-South alignment (Goodlette-Frank Road) would provide service along Goodlette-Frank Road from Immokalee Road to the Coastland Center Mall. The East West alignment (Golden Gate Parkway) would connect Coastland Center Mall to the Golden Gate Community via Golden Gate Parkway before turning south on Collier Boulevard, where it would service Walmart and the CAT Radio Facility.

    - Route 27 North-South (Collier Boulevard) would provide service along Collier Boulevard from Immokalee Road to Tamiami Trail with a deviation to the Golden Gate Community Center on Golden Gate Parkway. Route 27 East-West (Immokalee Road) would provide service along Immokalee Road from Walmart on Tamiami Trail to the Publix shopping center at Immokalee Road and Oil Well Road.

2.2.2 NEW SERVICE

The following are proposed new services intended to address specific mobility, parking, congestion concerns as well as pilot and test the application of new technologies and emerging mobility concepts.

- **New Island Trolley** – This fixed-route would travel along Collier Boulevard on Marco Island and connect to the realigned Route 21 Marco Island – Government Center Express route. It is envisioned that two vehicles are needed for 30-minute headways and that service would be a hop-on/hop-off type of service per discussions with the City. The Island Trolley would provide a frequent service available to all along a busy corridor and thus help mitigate the need to drive and help reduce congestion and parking demand.

- **New UF/IFAS and Lehigh Acres Route –** A need to connect Immokalee to the University of Florida/IFAS satellite campus and Lehigh Acres was identified during public outreach. However, roadway constraints do not allow for transit vehicles to enter and exit the UF/IFAS campus. Further study is recommended for the alignment and endpoint of this route and to determine the demand and costs. This service should be explored jointly by CAT and LeeTran based on mutual considerations and consensus.

- **I-75 Premium Express –**It is envisioned that this route would be a premium express commuter service operating along managed lanes on I-75. The Route would begin service at the Government Center, head north on Airport Pulling Road, turn east on Radio Road, north on Livingston Road, east on Golden Gate Parkway and go north on I-75 before ending in the vicinity of the Florida Gulf Coast Town Center. The northern terminus and operating plan require coordination with LeeTran. The route would require one vehicle to provide 90-minute headway service from 6 AM to 8 PM. Further study is recommended to finalize the alignment and endpoint of this route, as well as to assess demand and associated costs.

- **Bayshore Drive Electric Shuttle –** The Bayshore Community Redevelopment Agency (CRA) has requested that CAT help mitigate parking needs by operating two shuttles within the Bayshore CRA. This route is envisioned as a fixed-route electric shuttle that would operate as a hop-on/hop-off service, similar to the Beach bus, along Bayshore Drive, an area that has a growing vibrant nightlife and leisure culture. A survey was conducted by the Bayshore CRA to introduce the proposed service and vehicle, gauge community support, and identify the most visited destinations in the Bayshore Area. The route would require one vehicle, but would likely need to purchase two, to provide 15-minute headway service from Weeks Avenue to the Naples Botanical Garden from 11:00 AM to 9:00 PM. Further study of this service concept is recommended by CAT.

- **Downtown Autonomous Circulator –** The downtown autonomous circulator concept was developed as part of an effort to create a conceptual roadmap for CAT's sustainable future and to address congestion and the parking shortage in Downtown. The alignment of the circulator will be determined at a later date in coordination with the City of Naples.

- **Electric Naples Pier Shuttle –** The electric shuttle concept was developed as part of an effort to create a conceptual roadmap for CAT's sustainable future and to alleviate congestion and demand for parking in Downtown. The shuttle would make stops at the Naples Pier, Crayton Cove, as well as shops and restaurants within the area south of S 6th Avenue. CAT Staff will coordinate with merchants and representatives with the City of Naples to determine the final route alignment for the Shuttle.

2.2.3 MOBILITY-ON-DEMAND (MOD)

MOD uses on-demand information, real-time data, and predictive analytics to provide travelers with transportation choices that best serve their needs and circumstances. MOD service can be requested via a mobile app or website or by calling CAT. MOD service is designed to localize mobility (e.g., home to grocery store) and to provide connections to the fixed-route transit network for longer trips (e.g., home to bus stop to catch a bus downtown). MOD is designed to work well in areas in which fixed-route service may not be nearby, where customers have limited mobility access to bus stops, or where the necessary infrastructure is not available for safe or convenient access to bus stops. MOD (mobility on demand) service operates as a point-to-point system, responding to customer requests either immediately or scheduled for a future time.

When considering MOD service, input from public involvement, demographic characteristics, and the nature of the existing route network were considered. Many neighborhoods in proposed MOD zones have dead-ends and non-uniform street grids, thereby diminishing connectivity and walkability to bus stops. MOD zones are intended to fulfill unmet needs in these areas. In addition, MOD service is intended to be accessible by all, including the general public and ADA/TD-eligible persons. It, therefore, can be used to meet growing demand for CAT Connect service and may serve as a replacement for traditional paratransit service. Travel may be accommodated within a zone and may overlap into adjacent zones to complete short trips that cannot be served conveniently by fixed-route service. It can also be considered to supplement transit service in areas where transit services are being reduced due to decreased demand.

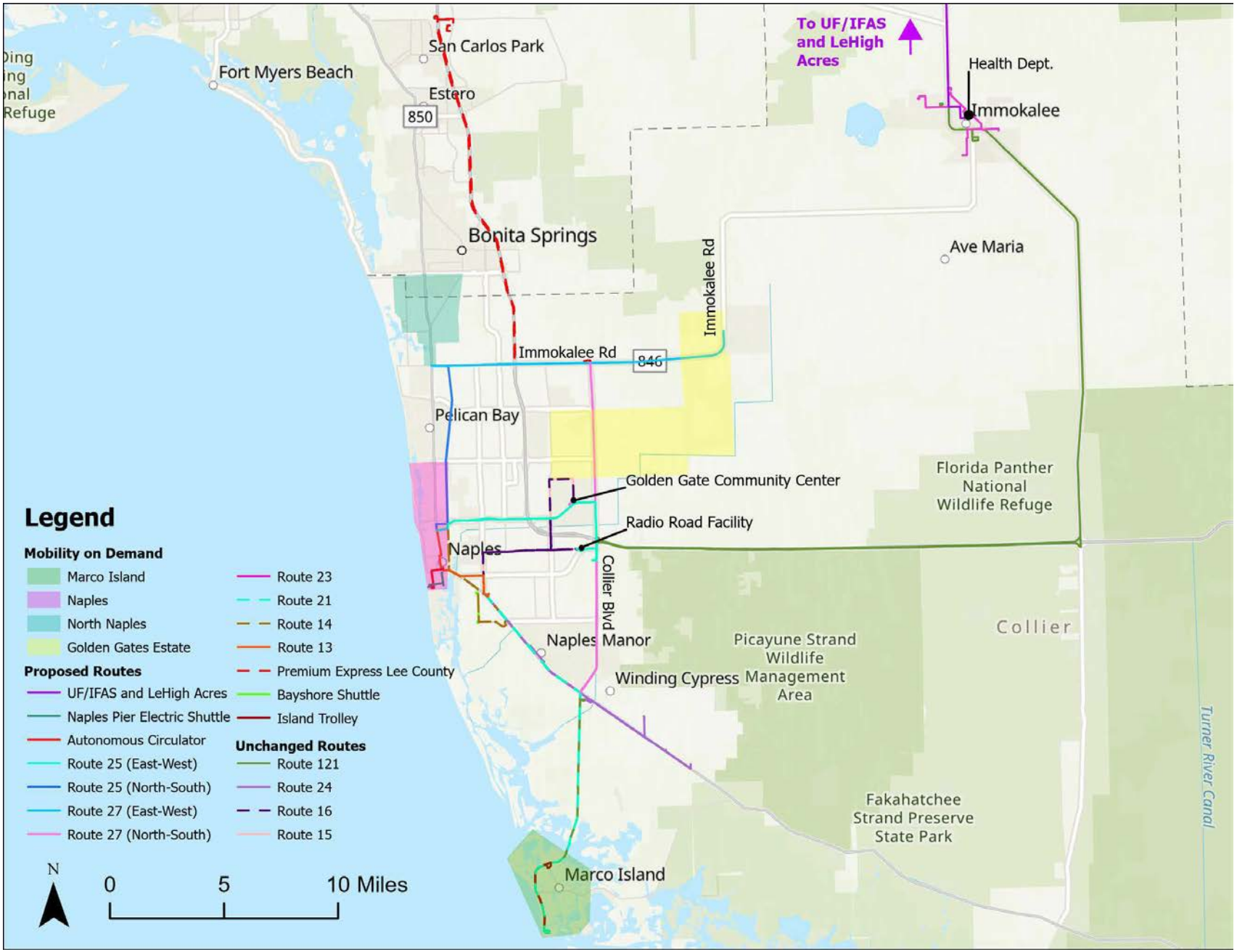
It is recommended to obtain a Software-as-a-Service (SaaS) cloud-based platform and operate MOD service as an extension of the existing CAT Connect general public dial-a-ride service. CAT may also elect to assess options to contract MOD operations as a Mobility-as-a-Service (MaaS) with a third party. However, contracting may limit potential for CAT to leverage MOD to supplement or address TD/ADA demand from CAT Connect to MOD.

The following potential MOD zones were identified:

- **Golden Gate Estates** – This MOD zone would include areas of Golden Gate Estates, a large development east of I-75. This zone currently has a high demand for paratransit service and would provide transit service to areas currently underserved by fixed-route transit; most are low-density and may require three vehicles in the peak and two during the off-peak to operate due to poor roadway connectivity.
- **North Naples**– This zone would cover the northeast quadrant of Collier County. The zone borders Bonita Beach Road and extends as far south as Immokalee Road and would serve areas east and west of US-41 as well as areas east and west of Old US- 41 Road.
- **Naples Zone** – This MOD zone would cover the beach from Broad Avenue to Pine Ridge Road as far east as Goodlette-Frank Road.
- **Marco Island**– This microtransit service would serve Marco Island and provide transfer opportunities to the proposed Island Trolley route. This service would likely require more than one vehicle, as it would continue to provide connections to other routes in the CAT network.



The MOD zones are illustrated in **Map 2-2**. The service operating concept, demand, and operating requirements will need to be studied for each proposed MOD zone prior to determining and deploying the service.



Map 2-2: MOD Zones

2.2.4 OTHER IMPROVEMENTS

Other improvements include:

- I-75 Managed Lanes Express Study
- Santa Barbara Corridor Service Study
- Immokalee Road Transfer Hub Study
- Branding for Beach Buses
- Park and Ride Lots

2.3 Evaluation of Alternatives

The remainder of this section summarizes the evaluation process for the service alternatives developed for the CAT TDP. Because many alternatives are identified, ranging from expansion of existing routes to implementation of new routes, it is important for CAT to prioritize these improvements to effectively plan and implement them within the next 10 years using existing and/or new funding sources.

2.3.1 ALTERNATIVES EVALUATION METHODOLOGY

To effectively prioritize and schedule these service enhancements, it was essential to assess the advantages of each improvement in relation to the others. Through an evaluation of alternatives, CAT can more effectively prioritize initiatives and distribute funding by employing an objective prioritization methodology. The subsequent part of this section outlines and clarifies the evaluation criteria utilized to prioritize the service enhancements. The three evaluation categories are as follows:

- Public Outreach
- Transit Markets
- Productivity and Efficiency

Table 2-2 shows these evaluation categories and the corresponding criteria, the measure of effectiveness, and the assigned weighting for each. A description of each criteria follows.

Table 2-1: Alternatives Evaluation Measures

Category	Criteria	Measure of Effectiveness	Relative Weighting	Overall Category Weight
Public Outreach	Public Input	Level of Interest in specific alternatives (Very High, high, Moderate, Low)	40%	40%
Transit Markets	Traditional Market	Percent serving poverty	15%	30%
	Proximity to Employment Market	Percent of countywide employment market served	15%	
Productivity and Efficiency	Productivity	Trips per hour (T-BEST-generated trips and revenue hours of service)	15%	30%
	Cost Efficiency	Cost per trip (including new trips)	15%	
Total			**100%**	**100%**

2.3.1.1 Public Outreach

Public outreach spans the entire development of the TDP. As a critical component of the TDP, it is used to support the development of key components of the plan including providing direction on the development of alternatives and supporting recommendations. Early in the development of the TDP a plan for engaging the public was developed and approved by partners at FDOT. The Public Involvement Plan outlined various strategies for engaging the public and identified how the engagement would guide development of the plan.

Outreach under the public participation plan has 3 main goals: to educate, to solicit and obtain feedback, and to integrate the feedback into the report to develop recommendations.. Of these goals, the integration of feedback into the recommendations is the most technical and influential. Public outreach enables stakeholders to comment on various aspects of the plan and prioritize recommendations. These recommendations result in weighted values that along with other measures, provide a solid foundation and guidance for developing and prioritizing transit alternatives.

2.3.1.2 Transit Markets

For the evaluation of alternatives, two transit markets were identified: the traditional market and the employment market.

- **Traditional Market** – Certain demographic groups with a history of relying on public transportation, such as those living below the federal poverty line, are more likely to use or depend on transit for their travel requirements. For the alternatives analysis, the percent serving poverty was calculated as the percent of poverty serviced by each route using ArcGIS and 2023 5-Year ACS data.
- **Proximity to Employment Market** – The total number of private jobs countywide served by each potential service option, determined from information produced using ArcGIS and interpolated 2026 socio-economic data from the D1RPM v2 model.



2.3.1.3 Productivity and Efficiency

Productivity is typically assessed based on ridership levels. Transit agencies utilize service efficiency as a metric to evaluate the effectiveness of their current resources. Both measures are essential for the agency's success, and services that demonstrate strong performance in productivity and efficiency should be prioritized accordingly. This assessment relies on projected figures for ridership, revenue hours, and operating costs for each specific alternative.

- **Ridership productivity** is measured in terms of annual passenger trips per revenue hour of service. To provide for an equal comparison between alternatives, passenger trips and revenue hours of service were generated using output from T-BEST 2035 ridership projection data.
- **Cost efficiency** is evaluated for each alternative using the standard transit industry efficiency measure of operating cost per passenger trip. Operating costs used are calculated using operating cost per trip based on CAT performance data and T-BEST 2035 ridership projection data.

The remainder of this section provides a summary of the criteria and measures used in each tier, along with the scoring thresholds for evaluating alternatives.

2.3.1.4 Alternative Scoring Thresholds

Each criterion has been given a specific weight. By assigning weights to the criteria, it becomes possible to assess the relative significance of each criterion within the group to which it applies. A score was calculated using a chosen measure of effectiveness or the informed judgment of the analyst. Potential scores were then allocated based on how the given transit alternative compares to others in relation to a specific criterion. A higher score indicates a higher ranking for the alternative being assessed in terms of the criterion under consideration. The computation-based criteria thresholds were established by calculating the average of the complete data set and then adding or subtracting one standard deviation from the average. **Table 2-3** shows the thresholds and scoring for each criterion.

Table 2-2: Alternatives Evaluation Scoring Thresholds

Criteria	Range	Score
Public Input (Interest in Improvement)	None	1
	Moderate	3
	High	5
	Very High	7
Traditional Market Potential (% Serving poverty)	Less than (Average -1 STDEV)	1
	Between (Average -1 STDEV) to Average	3
	More than Average to (Average + 1 STDEV)	5
	More than (Average +1 STDEV)	7
Proximity to Employment (Total Number of Private Jobs)	Less than (Average -1 STDEV)	1
	Between (Average -1 STDEV) to Average	3
	More than Average to (Average + 1 STDEV)	5
	More than (Average +1 STDEV)	7
Productivity (Trips per Hour)	Less than (Average -1 STDEV)	1
	Between (Average -1 STDEV) to Average	3
	More than Average to (Average + 1 STDEV)	5
	More than (Average +1 STDEV)	7
Cost Efficiency (Operating Cost per Trip)	Less than (Average -1 STDEV)	1
	Between (Average -1 STDEV) to Average	3
	More than Average to (Average + 1 STDEV)	5
	More than (Average +1 STDEV)	7

Each alternative will be evaluated using the process summarized above. From this process, each alternative will receive a score. The alternatives will then be separated by improvement type (i.e., route network/new service, frequency improvements and span improvements), and ranked based on their respective score.

Note that improvement s like MOD, Naples Pier Electric Shuttle, and the Autonomous Circulator will not be included in the technical analysis due to the limitations in the ridership estimation model. The New Island Trolley will also not be included since it is already funded.

EXECUTIVE SUMMARY
Reports & Presentations
Item 6c
Technology Improvements

Objective:
To update the committee on technology enhancements, ongoing and completed, for Collier Area Transit.

Considerations:
Collier Area Transit IT Manager, Mark Talaga, will be providing the committee an update on completed, in progress, and upcoming technology enhancement projects.

Recommendation:
None.

Attachment:
None.

Prepared by: _____ **Date:** 9/13/24
Alexander Showalter, Planner II

Approved by: _____ **Date:** 09/13/2024
Brian Wells, PTNE Division Director

MINUTES OF THE PUBLIC TRANSIT ADVISORY COMMITTEE MEETING

NAPLES, FLORIDA

AUGUST 21, 2024

LET IT BE REMEMBERED, the Public Transit Advisory Committee in and for the County of Collier, having conducted business herein, met on this date at 1:00 P.M. in REGULAR SESSION at Collier County Museum Lecture Hall, 3331 Tamiami Trail E, Naples, Florida with the following members present:

Chair:	John DiMarco, III
Vice-Chair:	Peter Berry (Virtual)
	Cliff Donenfeld
	Dewey Enderle
	Sonja Lee Samek
	Benita Staadecker
	Open Seat

ALSO PRESENT: Brian Wells, Director, Collier County PTNE
Omar DeLeon, Public Transit Manager, Collier County PTNE (Excused)
Alexander Showalter, Senior Planner, Collier County PTNE (Excused)
Keyla Castro, Operations Specialist, Collier County PTNE
Elena-Ortiz Rosado, Marketing Manager, Collier County PTNE
Liz Soriano, Project Manager, Collier County PTNE
Jacob Stauffer, Transit Planner, MV Transportation
Nolan Begley, Fixed Route Manager, MV Transportation (Virtual)
Dusty May Hansen, Senior Planner, Collier MPO

1. **Call to Order**
   Chair DiMarco called the meeting to order at 1:00 P.M.

2. **Roll Call**
   Roll call was taken, and a quorum of five was established.

   Mr. Enderle motioned to allow Vice Chair Berry to participate in the meeting as a virtual participant due to an extraordinary circumstance. Second by Ms. Samek. Carried unanimously 5 - 0.

Vice Chair Berry joined the meeting. A quorum of six was present.

3. **Approval of Agenda**
   Ms. Staadecker moved to approve the Agenda as presented. Second by Ms. Samek. Carried unanimously 6 - 0.

4. **Approval of Minutes**
   Ms. Samek moved to approve the minutes of the June 19, 2024; Public Transit Advisory Committee meetings as presented. Second by Mr. Enderle. Carried unanimously 6 - 0.

5. **Committee Action**
   a. **None**

6. **Reports and Presentations**
   Mr. Stauffer reported:
   a. **Major Transit Development Plan (TDP) Update**
      Mr. Stauffer reported the TDP process, which identifies recommendations and implementation strategies to achieve the goals and objectives of Collier Area Transit, is a work in progress.
      - To receive State Block Grant Funds for system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five (5) years.
      - The TDP is a ten (10) year plan for transit needs, cost and revenue projections, community transit goals, objectives and policies and serves as an operational guidance document.
      - The major update is developed in coordination with the Metropolitan Planning Organizations (MPO) long range transportation plan.
      - Collier Area Transit staff has been working with the Consulting Team of Stantec and MPO Staff to update the plan.
      - The consultant has produced the Public Involvement Plan, consistent updates to each section of the TDP and identified new peers for comparison of transit systems.
      - The deadline to submit all TDP updates to the Florida Department of Transportation (FDOT) for approval is September 1, 2024.

      If members of the Committee have any comments or questions regarding updates to the CAT Major TDP they should contact Mr. Showalter.

b. Marco Island Trolley Pilot

Mr. Stauffer presented the Executive Summary "*Marco Island Trolley Pilot*" to update the Committee on status of the proposed Marco Island Trolley route.

He noted:

- Collier Area Transit (CAT), in conjunction with the City of Marco Island, is considering the introduction of a trolley route to the island.
- 1 trolley and 1 thirty-foot bus will be utilized for transportation. Each vehicle has a seating capacity of thirty to forty passengers.
- The three-month pilot program, designed to test the viability of a trolley service on the island to reduce traffic congestion, would commence in January 2025.
- The route spans from the Rose Marina on the north side of the island, to Caxambas Park on the south side of the island, travelling along Collier Boulevard. The vehicles would stop at Veterans Community Park and existing beach access points along the way.
- The service, at no cost to the rider, would run from 9 AM to 9 PM.
- Surveys will be conducted to solicit feedback from the users.
- The pilot program is subject to funding by the City of Marco Island.
- A marketing campaign will be initiated at a later date.

c. Facilities Update

Ms. Soriano provided an update to the Committee on facilities projects and enhancements noting:

Collier Area Transit Operations & Maintenance Facility

- The current Radio Road facility, purchased in 2005, has exceeded its useful life.
- In 2020, Collier County received a notice of award from the Federal Transit Administration (FTA) Bus and Bus Facilities Program. Additional funds allocated by the FTA for Emergency Hurricane Relief Funds from Hurricane Irma will be directed to the project.
- The project was released for bid and the Jacobs Engineering Firm was selected to design the facility.
- The Administrative and Maintenance facilities will include operational offices, a drive-through maintenance area for the buses, secure fleet parking, solar panels and air conditioning for the maintenance shop.

CAT Intermodal Transfer Facility - Immokalee

- The bus transfer station will include passenger and transit efficiency enhancements including new bays for the buses to pull off the street; canopy cover for the sheltered transfer of passengers; waiting platform with benches and trash receptacles; vending machines for food or a Food Truck vendor; restroom facilities for passengers and drivers; and ADA improvements.
- The project is under construction and is planned to be completed by late 2024.

7. Member and Staff Comments

Ms. Rosado will email members an invitation to the Marco Island Trolley meeting.

8. Public Comments

None

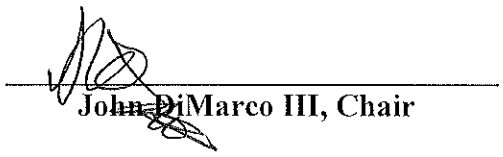
9. Next Meeting Date

September 18, 2024 - 1:00 P.M.
Collier County Museum Lecture Hall
3331 Tamiami Trail E
Naples, FL. 34104

10. Adjournment

There being no further business for the good of the County, the meeting was adjourned by the chair at 1:34 P.M.

Public Transit Advisory Committee



John DiMarco III, Chair

These minutes approved by the Board/Committee on September 18 ,2024 as presented____ or as amended X .

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierGov
facebook.com/CollierGov
youtube.com/CollierGov

November 14, 2024

FOR IMMEDIATE RELEASE

Notice of Hybrid Remote Public Meeting
Public Transit Advisory Committee (PTAC)
Collier County, Florida

November 20, 2024
1:00 p.m.

Notice is hereby given that the **Public Transit Advisory Committee (PTAC)** will meet on **Wednesday, November 20,** at **1:00 p.m**. This will be a Hybrid Remote meeting and it will be held at the Collier County Museum, Lecture Hall, 3331 Tamiami Trail East, Naples, Florida. The public may attend either remotely or in person.

Individuals who would like to participate remotely should contact Alexander Showalter at Alexander.Showalter@colliercountyfl.gov or call (239) 252-5849 by **noon on November 19**.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

The agenda will be available on the Collier County Government website at https://www.ridecat.com/inside-cat/ptac/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Alexander Showalter at (239) 252-5849.

Public Transit Advisory Committee
Collier Area Transit
Hybrid Meeting
Collier County Museum Lecture Hall
3331 Tamiami Trail East Naples, Florida
November 20th, 2024
1:00 p.m.

Agenda Packet

1) Call to Order
2) Roll Call
3) Approval of Agenda
4) Approval of Minutes
    a. September 18, 2024
5) Committee Action
    a. Grant Applications for 5310, 5311, and 5339
6) Reports and Presentations
    a. Seasonal Schedule Change 2024
7) Member Comments
8) Public Comments
9) Next Meeting Date – December 18th, 2024, Collier County Museum Lecture Hall
10) Adjournment

Two or more members of the Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future BCC meeting.

Collier Area Transit operates in compliance with Federal Transit Administration, (FTA) program requirements and ensures that transit services are made available and equitably distributed and provides equal access and mobility to any person without regard to race, color, or national origin, disability, gender or age. Title VI of the *Civil Rights Act of 1964*; FTA Circular 4702.1A, "Title VI and Title VI Dependent Guidelines for Federal Transit Administration Recipients.

Anyone who required an auxiliary aid or service for effective communication, or other reasonable accommodations in order to participate in this proceeding, should contact the Collier County Facilities Management Department located at 3335 Tamiami Trail East, Naples, Florida 34112 or 239-252-8380 as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

MINUTES OF THE PUBLIC TRANSIT ADVISORY COMMITTEE MEETING

NAPLES, FLORIDA

SEPTEMBER 18, 2024

LET IT BE REMEMBERED, the Public Transit Advisory Committee in and for the County of Collier, having conducted business herein, met on this date at 1:00 P.M. in REGULAR SESSION at Collier County Museum Lecture Hall, 3331 Tamiami Trail E, Naples, Florida with the following members present:

Chair:	John DiMarco, III
Vice-Chair:	Peter Berry
	Cliff Donenfeld
	Dewey Enderle
	Sonja Lee Samek (Excused)
	Benita Staadecker
	Open Seat

ALSO PRESENT: Brian Wells, Director, Collier County PTNE
Omar DeLeon, Public Transit Manager, Collier County PTNE
Alexander Showalter, Senior Planner, Collier County PTNE
Keyla Castro, Operations Support Specialist, Collier County PTNE
Rosio Garcia, Operations Analyst, Collier County PTNE
Marika Maldonedo, Paratransit Manager, Collier County PTNE
Samantha Markham, Project Manager, Stantec
Elena-Ortiz Rosado, Marketing Manager, Collier County PTNE
Corene Sanger, Management Analyst, Collier County PTNE
Liz Soriano, Project Manager, Collier County PTNE
Jacob Stauffer, Transit Planner, MV Transportation
Mark Talaga, Collier Area Transit IT Manager, Collier County PTNE
Nolan Begley, Fixed Route Manager, MV Transportation

1. **Call to Order**
   Chair DiMarco called the meeting to order at 1:00 P.M.

2. **Roll Call**
   Roll call was taken, and a quorum of five was established.

3. **Approval of Agenda**
   Vice Chair Berry moved to approve the Agenda as presented. Second by Ms. Staadecker. Carried unanimously 5 - 0.

4. **Approval of Minutes**
   Ms. Staadecker moved to approve the minutes of the August 21, 2024, Public Transit Advisory Committee meetings as amended:
   Add: Also Present – Dusty Siegler, Senior Planner, Collier County MPO.
   Second by Vice Chair Berry. Carried unanimously 5 - 0.

5. **Committee Action**
   a. **None**

6. **Reports and Presentations**
   a. **Marco Trolley Update**
   Mr. Showalter presented the Executive Summary "*Marco Island Trolley Pilot"* to update the Committee on the status of the proposed Marco Island Trolley route.
   He noted:
   - Collier Area Transit (CAT), in conjunction with the City of Marco Island, is considering the introduction of a trolley route to the island with two buses circulating daily on an approximate twenty-minute frequency.
   - Conversations with Rich Blonna, Marco Island Councilman, and representatives of the business community resulted in a three-month pilot program.
   - The program is designed to reduce traffic congestion on the island and will commence in January 2025.
   - The route spans from the Rose Marina on the north side of the island, to Caxambas Park on the south side of the island, travelling along Collier Boulevard. The vehicles would stop at Veterans Community Park and existing beach access points along the way.
   - The service, at no cost to the rider, will run from 9 AM to 9 PM.
   - At the September 9, 2024, Marco Island City Council meeting, members voted 4 – 3 in favor of the program.

   Committee Discussion
   Ms. Staadecker reported:
   - As an attendee at the council meeting, she voiced support for the trolley service, citing alleviation of traffic congestion as a benefit to residents.
   - Many attendees voiced opposition to the trolley program.
   - She suggested a town hall style meeting with Rich Blonna prior to the September 25th budget meeting would be advantageous.

Mr. DeLeon reported:

- PTAC intends to work closely with the Marco Island City Council to market the project and its benefits.
- Ideas and/or methods of working with the group and providing project information are welcome.
- Mr. Wells will work with Councilor Blonna on a Memorandum of Understanding for the Program (MOA).

b. Major Transit Development Plan (TDP) Update

Mr. Showalter reported that the TDP process, which identifies recommendations and implementation strategies to achieve the goals and objectives of Collier Area Transit, is a work in progress. He apprised the Committee of the status noting:

- To receive State Block Grant Funds for system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five (5) years.
- The TDP is a ten (10) year plan for transit needs, cost and revenue projections, community transit goals, objectives and policies and serves as an operational guidance document.
- The major update is developed in coordination with the Metropolitan Planning Organizations (MPO) long range transportation plan.
- Collier Area Transit staff have been working with the Consulting Team of Stantec and MPO Staff to update the plan.
- The consultant has produced the Public Involvement Plan, consistent updates to each section of the TDP and identified new peers for comparison of transit systems.
- MPO and CAT comments have been incorporated into the documents.
- Three updated tech and stakeholder memos were distributed to the Committee for review.

If members of the Committee have any comments or questions on the update they should contact Mr. Showalter.

c. CAT Technology Update

Mr. Talaga provided an update to the Committee on technology enhancements, ongoing and completed, noting:

Equans CAD/AVL Deployment

Fixed route operation system replacement upgrades include:

- New HDTS (high-definition video recording) on board.
- Upgraded APC sensors (passenger count system).
- New on-board infotainment screens.
- On bus integration for route scheduling.
- Traffic signal priority system integration.

Vice Chair Berry left the meeting at 1:22 PM. A quorum of four was present.

Data Transformation and Integration

The new Transit App was deployed to improve efficiency for riders including pass purchases, tracking routes, etc.

Committee discussion:

- The current app will be updated automatically if the rider has downloaded the appropriate settings on their phone.
- QR codes are available on signage to assist riders with transit information.
- Data transformation is run nightly.

EVIR Mobile Deployment

- An emergency vehicle integration response system was deployed to improve safety and response times by using technology to alert drivers and coordinate between fire and EMS vehicles and command centers.

Inspection Builder

- Zonar Systems for fleetwide diagnostics are being utilized.
- Repair costs are reasonable.

Fare Box

- A reliable, user-friendly Fare Box is being researched for installation on the buses.

New Projects

New projects on the ParaTransit side are in progress including upgraded Wi-Fi systems and new tablets.

Data Warehouse

A system that stores and organizes data from multiple sources for reporting, analysis, and business intelligence coordinating data access from all vendors has been adopted.

7. Member and Staff Comments

None

8. Public Comments

None

9. Next Meeting Date

October 16, 2024 - 1:00 P.M.
Collier County Museum Lecture Hall
3331 Tamiami Trail E
Naples, FL. 34104

10. Adjournment

There being no further business for the good of the County, the meeting was adjourned by the chair at 1:42 P.M.

Public Transit Advisory Committee

_____

John DiMarco III, Chair

These minutes approved by the Board/Committee on _____,2024 as presented_____ or as amended _____.

EXECUTIVE SUMMARY
Reports and Presentation
Item 5a
Grant Application for 5310, 5311, and 5339

Objective:
To report intent to submit Federal Transit Administration (FTA) Section 5310, 5311 and 5339 applications for submission to the Florida Department of Transportation (FDOT).

Considerations:
Pursuant to 49 U.S.C the Federal Transit Administration (FTA) programs 5310, 5311 and 5339 enables Collier County, a designated Community Transportation Coordinator, and provider of mass transportation to the elderly, individuals with disabilities, and those residing in non-urbanized areas of the County to apply for annual funding to support these Collier County residents. There are three (3) grant applications required to support these services: FTA 5310 to provide capital support to the elderly, individuals with disabilities; FTA 5311 to provide operational funding to support non-urbanized areas and FTA 5339 to replace, rehabilitate, and purchase buses, vans, and related equipment, as well as construct bus-related facilities in the non-urbanized areas.

FTA Section 5310 Grant Request
The 5310 capital and operating grant application requests in FY25 support the Collier Area Transit (CAT) System's purchase of replacement vehicles and operating expenses to support the paratransit service. Funding in the amount of $625,766 will be used to purchase four replacement paratransit vehicles and equipment that have met their useful life. The purchase of the replacement vehicles will not be an increase the overall paratransit fleet inventory. Additionally, $800,000 requested will be utilized to provide paratransit services in the urbanized areas of Collier County. This operations funding requires a 50% local match. If the grant is approved for the full operating amount requested, the funding allocation will be $400,000 of Federal funds and $400,000 of Local funds. This grant acquisition will provide for the ongoing transportation services to the elderly and disabled residents of Collier County. The funding and match requirements are outlined in the chart below.

FTA Section 5311 Grant Request
The 5311 grant application request in FY24 supports the Collier Area Transit System to offset operational costs to support fixed route service in the rural areas of Collier County. Funding in the amount of $1,444,000 will be used to maintain fixed route bus service in the rural areas of Collier County. The funding and match requirements are outlined in the chart below.

FTA Section 5339 Grant Request
The 5339 capital grant application request in FY24 supports the CAT System to purchase a replacement vehicle to support fixed route service and the construction of four bus stop improvements in the rural areas of Collier County. Funding in the amount of $852,079 will be used to purchase one 40 ft. fixed route bus to replace an existing bus that has met its useful life. Additionally, funding in the amount of 284,071 will be used for the purchase and construction of four bus stop improvements including shelters. The funding and match requirements are outlined

in the chart below.

Funding Request:

Grant	Federal Funding	State Match	Local Match	Total
5310	$ 900,613	$ 62,577	$ 462,577	$ 1,425,766
5311 Rural	$ 722,000	$ 0	$ 722,000	$ 1,444,000
5339 Rural	$ 924,481	$ 231,120	$ 0	$ 1,155,602
Total	$2,547,094	$ 293,697	$ 1,184,577	$ 4,025,368

Recommendation:
That the PTAC endorse the submittal of the applications.

Attachment:
Draft Grant Applications

Prepared by: _____ **Date:** 11/14/24
Omar De Leon, Transit Manager

Approved by: _____ **Date:** 11/14/2024
Brian Wells, PTNE Division Director

Florida Department of Transportation

Capital & Operating Assistance Application



49 U.S.C. Section 5310, CFDA 20.513

Formula Grants for the Enhanced Mobility of Seniors and Individuals with Disabilities

STOP: Before starting your application, make sure all agency profile information is up-to-date in TransCIP. The agency profile provides critical information. If the agency profile is incorrect, your application may be considered incomplete or ineligible for consideration.

Agency Name:	Collier County Board of County Commissioners	Use drop-down to select or type to enter
Project Type(s):	Capital	Use drop-down to select
	Capital	Use drop-down to select
FDOT District:	One	Use drop-down to select

Revenue Vehicle Inventory Certification

Instructions:

Applicants must ensure that the inventory in TransCIP is updated and includes all revenue vehicles. Only required fields must be completed. However, we encourage agencies to enter as much information as is readily available.

Failure to update inventory information will have a negative impact on your application. This information is critical in determining need and replacement status. Additionally, lack of updated information may cause a service enhancement project to not receive funding.

Each District will determine the deadline for vehicle information data entry to align with the Federal Fiscal Year 2025 application process. All updates must be completed by the deadline identified by your District, which may be different from that of other application elements.

The name of the accountable personnel and date of last inventory update must be provided in the fields below.

Certification:	Corene Sanger
Date:	10/14/2024

Transportation Program Operating and Administrative Expenses

Expenses: The Estimated Transportation Program Operating & Administrative Expenses table must include all expense associated with the applicant's transportation program. Expenses must be reported by type as provided in the Program Budget tab and the below definitions table:

1-digit Level:	Not applicable
2-digit Level:	**For example, 5010 Labor**
3-digit Level:	**For example, 5011 Operators Salaries and Wages**

Object Class	Code	Definition
Labor	**5010**	Labor expenses arise from the performance of work by employees. Labor expenses include pay and allowances owed to employees in exchange for the services provided to the transit agency. It also includes bonuses, shift differentials, overtime premiums, minimum guarantees, paid absences, and fringe benefits.
Operators' Salaries and Wages	5011	Operators' salaries and wages include the cost of labor, excluding paid absences and fringe benefits, for the transit agency's employees who are classified as revenue vehicle operators or crewmembers. These expenses include wages for performing activities related to vehicle operations such as: · Report time · Platform time · Turn-in time · Accident reporting time These expenses also cover wages paid to back-up (extra board drivers) such as stand-by time. In small transit systems, operators also may be scheduled to perform vehicle maintenance duties that are typically performed by vehicle maintenance employees. These duties may include servicing revenue vehicles (e.g., fueling, interior cleaning, and exterior washing) and limited inspection and maintenance of revenue vehicles. Operators sometimes are temporarily assigned duties other than driving their vehicles in revenue service such as: · training time either as a student or instructor · revenue vehicle movement control as dispatchers or road supervisors · movement of revenue vehicles among maintenance and operating facilities · maintenance of bus stops and shelters · general administration assignment such as customer service and marketing
Operators' Paid Absences	5012	This includes vacation leave, sick time, and other paid time off not contingent on a specific event outside the control of the transit agency for revenue vehicle operators or crewmembers.
Other Salaries and Wages	5013	This object class includes the cost of labor, excluding paid absences and fringe benefits, of employees of the transit agency who are not classified as revenue vehicle operators or crewmembers (e.g., maintenance workers, administrative staff, and transit managers).
Other Paid Absences	5014	This includes vacation leave, sick time, and other paid time off not contingent on a specific event outside the control of the transit agency for its employees that are not classified as revenue vehicle operators or crewmembers.

Transportation Program Operating and Administrative Revenues

Revenues: The Estimated Transportation Program Operating & Administrative Revenues table must include all funding sources used to support projected expenses. Revenues should be reported by type as provided in the application and the below definitions table:

1-digit Level:	**For example, 4100 Directly Generated Fares**
2-digit Level:	**For example, 4110 Passenger Fares**
3-digit Level:	**For example, 4111 Passenger-Paid Fares**

Object Class	Code	Definition
Directly Generated Funds	**4100**	Directly Generated Funds are funds that a transit agency earns from non-governmental sources. These revenues are generated by the transit agency.
Passenger Fares	4110	This revenue object class includes revenues earned from carrying passengers. This object class applies equally to directly operated (DO) and purchased transportation (PT) services. Generally, fares are the amounts paid by the rider to use transit services, to include the base fare, zone premiums, express service premiums, extra cost transfers, and quantity purchase discounts applicable to the passenger's ride. Agencies report the full amount of PT fare revenues regardless of whether the buyer or seller retains the revenue. Agencies may collect passenger fares in any of the following ways: 1. Before service is provided (e.g., through the sale of media such as passes, tickets and tokens sold to passengers) 2. Directly at the point of service (e.g., fare box, turnstile) 3. After the service is provided (e.g., through weekly or monthly billing) In some circumstances, several agencies share a fare card program and will periodically divide funds among themselves so that each agency within the program receives the appropriate amount of fare revenue. In such cases, each agency reports its share of the revenues. Passenger fares include Passenger-Paid Fares (4111) and Organization-Paid Fares (4112). Passenger fares do not include subsidies (e.g., subsidies from private organizations or subsidies from other sectors of operations), which are provided to support the general provision of transit service. Passenger fares also do not include fare assistance from other entities, such as governments, to provide a reduced fare or free fare for a general class of users (e.g., senior citizens, students). The agency reports subsidies and fare assistance in the appropriate private, state, local, or Federal Government sources of funds.
Passenger-Paid Fares	4111	Passenger-paid fares reflect the amount of the fare that the passengers pay on their own behalf. Passenger-paid fares may include the following examples: 1. Full Adult Fares: revenues earned by transporting passengers for the full adult fare. 2. Senior Citizen Fares: revenues earned by transporting passengers who pay a special, reduced fare because they are older than a prescribed age limit. 3. Student Fares: revenues earned by transporting passengers who pay a special, reduced fare because they are enrolled in an educational institution. 4. Child Fares: revenues earned from carrying passengers who pay a special, reduced fare because they are younger than a prescribed age limit. 5. Fares for Individuals with Disabilities: revenues earned from carrying passengers who pay a special, reduced fare because they are persons with disabilities. 6. Ferryboat Services: revenues earned from walk-on pedestrians, bicyclists, and public transportation vehicles passenger fares. For vehicles, the agency reports passenger fares for each occupant of the vehicle, including the driver. However, vehicle and bicycle ferriage fees are not included in passenger-paid fares but are reported in Non-public Transportation Revenues (4130). 7. Vanpool Services: For publicly sponsored vanpool (VP) services, passenger fares have unique provisions. For VP services, passenger fares include all fees and costs paid by the passengers. These costs often include fuel costs, maintenance expenses, lease payments, tolls and other out-of-pocket costs. 8. Special Ride Fares: revenues earned from carrying passengers who pay a special, reduced fare for a reason other than those specified above. 9. Handling Fees: revenues earned from charges for processing payment and issuing fare cards (e.g., an agency charges an initial start-up fee when issuing new cards, or charges extra fees for using one-time paper cards). 10. No-show Fines: revenues earned from fines for demand response passengers who do not show up for a scheduled pickup.
Organization-Paid Fares	4112	Organization-paid fares are paid for by an organization rather than by the passenger. Organization-paid fares also include funds for rides given along special routes for which a beneficiary of the service may guarantee funds. Organization-paid fares may result from agreements between the reporter and an agency or organization that pays a set amount in return for unlimited and/or reduced fare transit service for the persons covered by the agreement. Examples of organization-paid fares may include the following: 1. State and Local Government: revenues earned by providing rides for employees of state and local government (e.g., fares for postal workers or police officers). 2. Reduced Fare Reimbursements: revenues earned by providing rides for its members or beneficiaries. A common example is a university paying a transit agency to permit students to ride free after showing their valid student identification cards. 3. Special Route Guarantees: amounts paid for by organizations other than governments (e.g., industrial firms, shopping centers, public and private universities) to guarantee a minimum amount of funds on a line operated and/or to provide or maintain services to a specific area, especially for the benefit of the paying organization. 4. Other Special Contract Transit Fares: revenues earned under contractual arrangements with non-government entities for transit fares other than those arrangements specified in the above categories. A common example is a senior center that pays part of the cost of a route serving the center.
Park-and-Ride Parking Revenue	4120	The agency earns park-and-ride parking revenue from parking fees paid by passengers who drive to park-and-ride facilities operated by the agency to use transit service. The agency reports revenues earned from the operation of parking lots that are not park-and-ride locations in Other Agency Revenues (4150).

Fringe Benefits	5015	Fringe benefits are the expenses for employment benefits that an employee receives in addition to his or her base salaries and wages. Fringe benefits include payments associated with the employee's labor that do not arise from the performance of work, but still arise from the employment relationship. Fringe benefits can be divided into the following four categories: 1. Employment Taxes: federal, Medicare, and Social Security taxes. 2. Health and Welfare Expenses: medical and dental insurance plans (to include hospital, surgical, and pharmaceutical plans); short-term disability and life insurance plans; workers' compensation or Federal Employees Liability Act Contribution; and unemployment plans. 3. Retirement Costs/Pension Plans: pension plans, long-term disability plans, and other postemployment benefits (OPEB). 4. Other Fringe Benefits: uniform and work clothing; tool allowances; employee and family transit passes; reimbursements for moving and education; assistance for dependent care, childcare, and adoption; employee discounts; and other fringe benefits not described in the categories listed above. Other Postemployment Benefits (OPEB) In addition to pensions, some transit agencies provide other postemployment benefits (OPEB). OPEB includes postemployment healthcare and life insurance that are provided separately from a pension plan.	Non-Public Transportation Revenues	4130	This object class includes revenue for providing transportation services to private groups or entities or for carrying freight. The most common examples are the following: 1. Charter Service Revenues: revenues earned from operating vehicles under charter service contracts. 2. Freight Tariffs: revenues earned from carrying freight on routes whose primary purpose is passenger operations. These are the revenues earned from carrying all types of freight on passenger routes. It includes fees for carrying vehicles and bicycles on ferries. See ferryboat services example in Passenger-Paid Fares (4111). 3. School Bus Service Revenues: revenues earned from operating vehicles under school bus contracts. It is the amount paid by schools for the operation of buses exclusively to carry children to and from school. 4. Sight-seeing Fares: revenues earned from operating vehicles in sight-seeing service.
Services	**5020**	Services are the labor and other work provided by outside organizations for fees and related expenses. Outside organizations may be private companies or public entities. The agency reports work done by personnel within the reporting unit as salaries and wages and fringe benefits. For example, if the reporting unit is a city, then transit-related work done by city employees, even those outside the transit division, is reported as salaries and wages and fringe benefits, not services. Services provided by an outside organization are usually procured as a substitute for in-house employee labor, except in the case of independent audits, which could not be performed by employees. Agencies usually substitute services for in-house labor because the skills offered by the outside organization are needed for only a short period of time or internal staff does not have the requisite skills. This object class includes all costs that are part of the service agreement. For example, if in a contract for custodial service the custodial company provides the cleaning supplies, the cost of these supplies belongs to Services, not Other Materials and Supplies. The services object class does not include purchased transportation service. A contractor that provides vehicle operators is considered a purchased transportation provider, and any other labor or materials provided by that contractor, including fuel, parts, and maintenance, belong to the purchased transportation object class.	Auxiliary Transportation Funds	4140	Auxiliary transportation funds are earned from activities related to the provision of transit service but are not payment for transit service. Auxiliary funds result from business-type activities in which an agency earns supplemental revenues. For example, a transit agency is not in the advertising or concessions business, but it is able to earn additional funds by providing or leasing out these additional services to the public. Auxiliary funds include the following: 1. Advertising revenues 2. Concessions 3. Other auxiliary transportation revenues
Materials and Supplies	**5030**	The expenses in the following three object classes include products obtained from outside suppliers or those manufactured internally. The cost of the material or supply includes freight-in, purchase discounts, cash discounts, sales taxes, and excise taxes (except on fuel and lubricants). Charges to this object class include both materials and supplies issued from inventory for use, and materials and supplies purchased for immediate use (i.e., items used without going through inventory).	Advertising Revenues	4141	Advertising revenues include funds earned from displaying advertising materials on transit system vehicles and property and includes agency media.
Fuel and Lubricants	5031	This object class includes fuel used to propel revenue and non-revenue vehicles and lubricants such as motor oil, transmission fluid, and grease. Purchase and cash discounts are included in the cost of the fuel or lubricant. Sales or excise taxes are not included in the cost; they are reported separately under Taxes (5060). The agency reports fuel costs net of fuel taxes, even if the agency paid the taxes initially and was later reimbursed. Note that modes powered by electricity report propulsion power under Revenue Vehicle Operation Utilities.	Concessions	4142	Concessions are revenues earned from granting operating rights to businesses (e.g., newsstands, candy counters) on property and equipment maintained by the transit agency (e.g., stations, vehicles). This also includes revenues from vending machines available on property maintained by the transit agency for public use.
Tires and Tubes	5032	This object class includes the cost of tires and tubes, whether they are rented, leased or purchased. Do not report rented and leased tires and tubes under Operating Lease Expenses (5220). Purchase discounts, cash discounts, sales taxes, and excise taxes are included in the cost of the tires and tubes.	Other Auxiliary Transportation Revenues	4149	The agency earns other auxiliary transportation revenues from auxiliary operations other than those specified above. This might include, but is not limited to merchandising, photo identification (ID) fees, locker rentals, movie licensing fees, naming rights, and fines for fare evasion or illegal parking.
Other Materials and Supplies	5039	The expenses in this object class include products obtained from outside suppliers or those manufactured internally that are not covered in the two preceding object classes. The cost of the material or supply includes shipping costs, purchase discounts, cash discounts, sales taxes, and excise taxes. Costs associated with this object class include materials and supplies issued from inventory or purchased for immediate use (i.e., items used without going through inventory).	Other Agency Revenues	4150	This object class includes revenues earned from activities not associated with the provision of the transit agency's transit service. Other agency revenues do not include funds received from local, state, or federal governments. Examples of other agency revenues include: 1. Sales of Maintenance Services: revenues earned from sales or performing maintenance services on property not owned or used by the transit agency. 2. Sales of Fuel: revenues earned from sales of fuel. 3. Sales of Assets: revenue received in the sale of an asset that is in excess of the asset's book value. See Sales and Disposals of Assets (4630) for a detailed example. 4. Rental of Revenue Vehicles: revenues earned from leasing transit agency revenue vehicles to other operators. 5. Rental of Buildings and Other Property: revenues earned from leasing transit system buildings (other than station concessions) and property to other organizations. 6. Rental of Real Estate: revenues earned from leasing real estate owned by the transit agency to other organizations. This includes revenues from joint development projects. 7. Rental Car Fees: revenues earned from rental car services. 8. Investment Income: revenues earned from investing in marketable securities and dividends received from state insurance pools. Investment income does not include earnings on capital grant funds advanced by the grantor; such earnings are to be credited to the same account as the capital grant itself. 9. Interest Income: revenues earned by placing funds in an interest-bearing account. 10. Student Fees: revenues generated by an educational institution from student fees to operate its own transit service. Student fees are different from student fares, which are amounts paid by the students for transit service. 11. Parking Facilities Revenue: revenues earned from parking fees generated from parking facilities not normally used as park-and-ride locations. Revenues earned from operating park-and-ride facilities are reported in Park-and-Ride Parking Revenue (4120). 12. Donations: funds from donations and grants from private foundations. 13. Other Agency Revenues: revenues that might include, but are not limited to: warranty claims, funds from lawsuits, Freedom of Information Act (FOIA) requests, revenue from vending machines available exclusively for employee use, administrative fees charged to other organizations,
Utilities	**5040**	This object class includes expenses for electricity, gas, water, telephone, heating oil, fuel for backup generators, and internet.	Revenues Accrued through a Purchased Transportation Agreement	4160	This object class includes revenue accrued by the transit agency as a seller of transportation services through purchased transportation agreements. This includes the contract funds earned (payments and accruals) by a reporter under contract to another reporter or public agency. The purchased transportation agreement must meet the requirements for a true Contractual Relationship. Revenue accrued through an agreement that does not meet these requirements is reported as Organization-Paid Fares (4112), Other Agency Revenues (4150), Local Government Funds (4300), or State Government Funds (4400), as appropriate.

Casualty and Liability Costs	**5050**	Expenses related to loss protection and losses incurred by the transit agency. These expenses include: · Compensation of others for their losses due to acts for which the transit agency is liable. · The costs of protecting the transit agency from losses through conventional insurance and other risk financing programs (e.g., self-insurance and insurance pools). · Agency losses due to the liable actions of others that are covered by other corporate insurance. Note that refunds and paybacks received from state insurance pools are netted from Casualty and Liability Costs. Transit agencies often incur self-insurance costs. Note that premiums also include self-insurance costs. Casualty and Liability Costs include the following: 1. Premiums for Physical Damage Insurance: premiums applicable to the reporting period to insure the transit agency from loss through damage to its own property caused by collision, fire, theft, flood, earthquakes and other types of losses. 2. Premiums for Public Liability and Property Damage Insurance: premiums applicable to the reporting period to insure the transit agency against loss from liability for incidents by the transit agency which cause damage to the person or property of others. 3. Payouts for Insured Public Liability and Property Damage Settlements: payments (or accruals) of actual liability to others arising from culpable acts of the transit agency that are covered by public liability insurance. 4. Payouts for Uninsured Public Liability and Property Damage Settlements: payments (or accruals) of actual liability to others arising from culpable acts of the transit agency that are not covered by public liability insurance. 5. Provision for Uninsured Public Liability and Property Damage Settlements: periodic estimates of liability to others arising from culpable acts of the transit agency that relate to the current period that are not covered by public liability insurance. 6. Premiums for Other Corporate Insurance: premiums applicable to the reporting period to insure the transit agency from losses other than damage to its property or liability for its culpable acts (e.g., fidelity bonds, business records insurance). 7. Other Corporate Losses: charges for actual losses resulting from events covered by the other corporate insurance. The agency reports costs of employees engaged in insuring and processing claims for and against the reporting agency in Labor, as appropriate. The agency reports the costs of repairing damaged property in Labor and Other Material and Supplies (5039), as appropriate. The costs of writing off property damaged beyond repair are reported as Extraordinary or Special Items (5280), depending on the circumstances of the impairment.	Subsidy from Other Sectors of Operations	4170	Occasionally, the transit operation is only one part of a larger transportation entity. Such transit agencies may receive subsidies from other sectors of operations within the larger transportation entity to help cover the cost of transit. For example, a transportation authority that is responsible for airports, ports, or bridges, as well as for public transit, may apply excess funds from airport operations to transit operations. Subsidies from other sectors of operations may include: · Subsidies from utility rates where the transit agency is a utility company · Subsidies from bridge and tunnel tolls owned and operated by the transit agency · Subsidies from other sources provided by the same entity that operates the transit service
Taxes	**5060**	Tax expenses are the charges and assessments levied against the transit agency by federal, state and local governments. Sales taxes, excise taxes, freight-in and other acquisition costs are not included in this object class. Instead, they are accounted for as part of the cost of the material or service purchased. Reimbursement of Taxes Paid Reimbursement, or refunds, of taxes paid include the receipt or accrual of state government payments to help cover the cost of taxes incurred by the transit agency. Reimbursement of taxes is netted from the associated expense on which the tax was originally levied. The agency does not report reimbursements of taxes as revenue. For example, some states reimburse transit agencies for taxes paid on fuel. Agencies net refunds of fuel taxes from fuel tax expense, rather than reporting them as revenue.	Extraordinary and Special Items	4180	Extraordinary items are events or transactions that are distinguished by their unusual nature and by the infrequency of their occurrence. 1. Unusual nature means that the underlying event or transaction has a high degree of abnormality and is clearly unrelated to, or only incidentally related to, the ordinary and typical activities of the transit agency. 2. Infrequency of occurrence means that the underlying event or transaction would not reasonably be expected to recur in the foreseeable future, taking into account the environment in which the transit agency operates. Special items are events or transactions that are either unusual in nature or infrequent, but not both. The agency determines an extraordinary event or transaction to be material if it is material in relation to the agency's income before extraordinary items, to the trend of annual earnings before extraordinary items, or is material by other appropriate criteria. Examples of material extraordinary items include recoveries received for damages from a natural disaster, such as a hurricane or earthquake. Assets impaired by and recoveries received from these events are considered extraordinary because they are abnormal in occurrence and are not reasonably expected to recur in the foreseeable future. Extraordinary and special items are distinguishable from normal operating items and are thus reported separately. The nature and financial effects of each event or transaction is disclosed on the face of the statement of activities or in the notes to the financial statements. There are four object classes for Extraordinary and Special sources of funds. This one is for such funds that are directly generated. For example, agencies report insurance recoveries for property damaged in a natural disaster in this object class.
Purchased Transportation Expenses	**5100**	Purchased Transportation (PT) expenses include the payments or accruals to sellers or providers of service, including fare revenues retained by the seller. It does not include the capital leasing portion of the contract. Purchased vanpool service has its own unique issues. Please refer to Vanpool for more detail.	Total Recoveries	4190	Total recoveries include proceeds recovered from insurance companies to indemnify the transit agency for insured acts that resulted in a liability for damage to transit personnel or property or damage to the person or property of others. Total recoveries include monies received for items or events that are not classified as Extraordinary or Special (4180). For example, the agency reports proceeds received from insurance companies for physical damage claims resulting from an accident as insurance recoveries. Total recoveries also include amounts recovered from others held liable to damage to the transit agency's property. For example, the agency reports proceeds received from third parties involved in an accident as insurance recoveries. The agency reports full proceeds received from the insurance company as insurance recoveries; the agency does not net monies from the related asset replacement cost.
Purchased Transportation in Report	5101	This object class includes the payments or accruals to sellers or providers of service, including fare revenues retained by the seller. The agency reports Purchased Transportation (PT) expenses in this object class when they report the associated service in their own NTD report. If the other party reports the service, the expenses belong to the object class Purchased Transportation Filing Separate Report (5102). Please refer to Reporting Contractor Expenses for more information.	**Directly Generated Dedicated Funds**	**4200**	This object class includes taxes and fees levied by a transit agency that is organized as an independent political entity with its own taxation authority. The revenues to the transit agency originating from local, state, or federal governments, which have been raised through the taxing authority of the grantor governmental unit, are considered Local Government Funds (4300), State Government Funds (4400), or Federal Funds (4500).
Purchased Transportation Filing Separate Report	5102	The agency reports Purchased Transportation (PT) expenses in this object class when the other party reports the associated service data (e.g., miles, ridership) in their own NTD report. The agency that reports the service data then reports Purchased Transportation (PT) expenses in the object class Purchased Transportation in Report (5101). Reporting Contractor Expenses The expenses in this object class must include the total amount paid by the buyer to the seller. The seller's actual expenses are often less than this amount, since the seller receives a profit included in the expenses paid by the buyer; the actual expenses will be greater than the amount paid if the seller suffers a loss. Since buying agencies are reporting, the expenses recorded are the buyer's expenses, and the buyer reports the total amount paid to the seller.	Income Taxes	4210	Revenues earned by taxing the income of individuals and/or organizations subject to the taxing authority of the transit agency.

Miscellaneous Expenses	**5090**	This object class includes expenses that cannot be attributed to any of the other expense object classes. Agencies must check to be sure an expense does not belong in a different object class before reporting it as miscellaneous. Some common miscellaneous expenses are listed below. 1. Dues and Subscriptions: Fees for membership in industry organizations and subscriptions to periodicals. 2. Travel and Meetings: Air, train or bus fares and allowances for transportation of traveling transit agency employees and related officials. In addition, this expense includes food and lodging, charges for participation in industry conferences, and other related business meeting expenses. 3. Bridge, Tunnel, and Highway Tolls: Payments made to authorities and other organizations for the use of bridges, tunnels, highways, and other facilities. 4. Entertainment Expense: Costs of social activities and other incidental costs relating to meals, beverages, lodgings, transportation, and gratuities. 5. Charitable Donations: Contributions to charitable organizations made by the transit agency. 6. Fines and Penalties: Costs of fines and penalties incurred by the transit agency. 7. Bad Debt Expense: Amounts owed to the transit agency that the agency has determined to be uncollectable.	Sales Taxes	4220	Revenues earned by taxing sales of goods and/or services subject to the taxing authority of the transit agency.
ADA Expenses	**5910**	The Americans with Disabilities Act of 1990 (ADA) prohibits discrimination and ensures equal opportunity for persons with disabilities in employment, state and local government services, public accommodations, commercial facilities, and transportation. Agencies must report the total expenses that result from ADA requirements for complementary paratransit in demand response (DR) and demand response-taxi (DT) modes. In this object class, agencies report the portion of their operating expenses that is attributable to ADA-required service. This object class is not exclusive of other operating expense object classes. For example, if you spent $10,000 on vehicle fuel, and $1,000 of this was to fuel a vehicle used for ADA service, then you would report $10,000 under Fuel and Lubricants (5031) and $1,000 under ADA Expenses (5910).	Property Taxes	4230	Revenues earned by taxing property subject to the taxing authority of the transit agency.
Reconciling Items	**5200**	Reconciling items are expenses that are not included as capital expenses or as mode-specific operating expenses. If reconciling items represent cash expenditures such as operating lease expenses, the agency reports them as Funds Applied. The agency reports non-cash expenditures such as depreciation as Funds Not Applied.	Fuel Taxes	4240	Revenues earned by taxing fuel subject to the taxing authority of the transit authority. This object class was previously known as gasoline taxes but includes all fuel taxes.
Interest Expenses	5210	Interest expenses are charges for the use of capital borrowed by the transit agency. Interest expenses may accrue on both short-term debt and Long-Term Debt obligations. 1. Interest on Long-Term Debt Obligations: charges for the use of capital borrowed on a long-term basis (the liability for which is usually represented by bonds or loans) employed in the operation of the transit system. Interest charges pertaining to construction debt that are capitalized will not be reflected as interest expense. 2. Interest on Short-Term Debt Obligations: charges for the use of capital borrowed on a short-term basis employed in the operation of the transit agency.	Other Taxes	4250	Revenues earned by levying other taxes by the authority of the transit agency. Examples include cigarette/tobacco, payroll, excise, and vehicle rental taxes.
Operating Lease Expenses	5220	Operating lease expenses include payments for the use of Capital Assets not owned by the transit agency. Operating leases allow the transit agency to use assets, but do not allow them the rights of asset ownership (e.g., transfer of title). As such, operating leases are not capitalized as assets, but are recorded as operating expenses during the reporting period. Some operating leases include costs that the agency must separate out and report under Services (5020). If part of the lease cost covers a service, rather than just the cost of the use of the asset, the agency reports this under Services (5020) rather than operating lease expenses. This also applies to Capital Leases (5230) and Related Parties Lease Agreements (5240).	Bridge, Tunnel, and Highway Tolls	4260	Tolls enacted by the authority of the transit agency on bridges, tunnels, highways, or other roadways, except High Occupancy Vehicle (HOV) toll revenues.
Capital Leases	5230	Other than an operating lease, an agency may also have a capital lease. A lease is considered a capital lease if it meets any of the following four criteria at its inception (the earlier of the date of the lease agreement or commitment): 1. Transfer of ownership: the lease transfers ownership (e.g., transfer of title) of the property to the transit agency by the end of the agreed-upon lease term. 2. Bargain purchase option: the lease contains a provision that allows the transit agency to purchase the leased property for a reduced price (reduced compared to expected fair value of the property at the date that the purchase option becomes exercisable). 3. Lease term: lease term is equal to or greater than 75% of the estimated useful life of the leased property. However, if the beginning of the lease term falls within the last 25% of the total estimated useful life of the leased property, this criterion cannot be used for classifying the lease as a capital lease. 4. Minimum lease payments: the present value at the beginning of the lease term of the minimum lease payments to be paid by the transit agency, excluding executory costs such as insurance, maintenance, and taxes, is equal to or greater than 90% of the fair value of the property at lease inception. The agency reports the current portion of capital leases in operating expenses for the reporting period. The current portion of capital leases includes lease payments made for capital leases during the reporting period. The noncurrent portion of capital leases is capitalized and reported as Capital Lease Obligations (2230).	High Occupancy Tolls	4270	HOV lanes allow vehicles with a certain minimum number of passengers (e.g., at least 2), as well as motorcycles and alternative fuel vehicles in some cases, to use lanes that are closed to other traffic. Some HOV lanes allow vehicles that would normally be prohibited to use the lane by paying a toll. Revenue from these tolls, when enacted by the authority of the transit agency, belongs to this object class.
Related Parties Lease Agreements	5240	Other than operating and capital leases, transit agencies may also have related parties lease agreements. Related parties leases are leases with terms and payment amounts that are substantially less than they would be in usual circumstances because the transit agency is related to the lessor. Common examples include: · A state government's department of transportation purchases buses and leases them to transit agencies in the state at half the market rate. · A county government leases land to a local transit agency for use as a parking lot for a dollar a year.	Other Dedicated Funds	4290	Revenues dedicated to transit other than taxes or tolls. These are often fees imposed on the public by the transit agency. Examples include the following: 1. Vehicle licensing and registration fees 2. Driver's license fees 3. Communications access fees and surcharges 4. Lottery and casino proceeds

Voluntary Non-Exchange Transactions	5250	This object class is for the provider to record the non-exchange expenses when all applicable eligibility requirements have been met. In a voluntary non-exchange transaction, an agency gives or receives value (e.g., revenue vehicle) without directly receiving or giving equal value (e.g., cash) in return. This is different from an exchange transaction, in which each party receives and gives up essentially equal values. Voluntary non-exchange transactions result from legislative or contractual agreements, other than exchanges, entered into willingly by the parties to the agreement. An example of a voluntary non-exchange transaction is when one transit agency builds capital assets, such as railways and train stations, and transfers the assets to another transit agency that operates them. Other examples of voluntary non-exchange transactions include certain grants and private donations. The provider in a non-exchange transaction recognizes a decrease in assets when all applicable eligibility requirements of the non-exchange transaction have been met. The provider reports resources transmitted before eligibility requirements are met as Assets (e.g., an advance). Receiving agencies can find guidance for reporting the non-exchange transaction under the Non-Added Revenue: Voluntary Non-Exchange Transaction (4630)	**Local Government Funds**	**4300**	These are funds received from municipal and county governments.
Depreciation	5260	Depreciation is the depletion of the cost of Capital Assets; it reflects the loss in value of capital assets over the years. In order to account for the reduction in value and usefulness of tangible property, the agency expenses a portion of the cost as depreciation each year of the asset's life. The agency reports the amount depreciated during the reporting period as an operating expense/reconciling item. Typically, as a non-cash expenditure, the agency reports depreciation as Funds Not Applied. Agencies choose their own depreciation method provided that the depreciation value is measured in a systematic and rational manner. Agencies also report the cost of writing off property damaged beyond repair that do not qualify as extraordinary and special items in this object class.	General Revenues of the Local Government	4310	There are essentially two common ways a local government can provide funds to a transit agency. 1. The government may appropriate a portion of its general budget to transit without a dedicated source of funding. In this case, the transit agency annually competes for funding with other entities such as schools and police forces. The agency reports this non-dedicated funding as General Revenues of the Local Government. 2. The government may also levy a tax or fee, the proceeds of which only go to transportation. This is a dedicated fund and the agency reports it under Local Funds Dedicated to Transit at Their Source.
Amortization of Intangibles	5270	Amortization is the systematic spreading of the value of Intangible Assets other than Goodwill over the asset's estimated useful life. Generally, agencies use the straight-line method to amortize intangible assets. The agency reports the amount amortized during the reporting period as an operating expense/reconciling item. Typically, the agency reports amortization as Funds Not Applied since it is not a cash expenditure.	Income Taxes	4321	Revenues earned by taxing the income of individuals and/or organizations subject to the taxing authority of the local government.
Extraordinary and Special Items	5280	Extraordinary items are material events or transactions that are distinguished by their unusual nature and by the infrequency of their occurrence. Examples of material extraordinary items include capital assets that were impaired by extraordinary events such as Hurricane Sandy or Hurricane Katrina. The agency reports these impaired values as extraordinary items rather than regular operating expenses to highlight their unusual and infrequent nature. If a material event or transaction is unusual in nature or occurs infrequently but not both, it does not meet criteria for classification as an extraordinary item; instead, the agency classifies it as a special item. Both extraordinary and special items are distinguishable from normal operating items and the agency thus reports them separately.	Sales Taxes	4322	Revenues earned by taxing sales of goods and/or services subject to the taxing authority of the local government.
Other Reconciling Items	5290	Other Reconciling Items are any other costs that cannot be captured in the above reconciling items object classes, such as funds to another agency through a cooperative agreement and expenses for purchased transportation services not meeting NTD requirements for a contractual agreement.	Property Taxes	4323	Revenues earned by taxing property subject to the taxing authority of the local government.
ADA Related Reconciling Items	5920	The Americans with Disabilities Act of 1990 (ADA) prohibits discrimination and ensures equal opportunity for persons with disabilities in employment, state and local government services, public accommodations, commercial facilities, and transportation. Agencies must report the total expenses that result from ADA requirements for complementary paratransit in demand response (DR) and demand response-taxi (DT) modes. In this object class, agencies report the portion of their reconciling item expenses that are attributable to ADA-required service. This object class is not exclusive of other reconciling item object classes. For example, if you spent $10,000 to lease vehicles, and $1,000 of this was to lease a vehicle used for ADA service, then you would report $10,000 under Operating Lease Expenses (5220) and $1,000 under ADA Related Reconciling Items (5920).	Fuel Taxes	4324	Revenues earned by taxing fuel subject to the taxing authority of the local government. This object class was previously known as gasoline taxes but includes all fuel taxes.
			Other Taxes	4325	Revenues earned by levying other taxes by the authority of the local government. Examples include cigarette/tobacco, payroll, excise, and vehicle rental taxes.
			Bridge, Tunnel, and Highway Tolls	4326	Tolls enacted by the authority of the local government on bridges, tunnels, highways, or other roadways, except High Occupancy Vehicle (HOV) toll revenues.
			High Occupancy Tolls	4327	HOV lanes allow vehicles with a certain minimum number of passengers (e.g., at least 2), as well as motorcycles and alternative fuel vehicles in some cases, to use lanes that are closed to other traffic. Some HOV lanes allow vehicles that would normally be prohibited to use the lane by paying a toll. Revenue from these tolls, when enacted by the authority of the local government, belongs to this object class.
			Other Dedicated Funds	4329	Revenues dedicated to transit other than taxes or tolls. These are often fees imposed on the public by the local government. Examples include the following: 1. Vehicle licensing and registration fees 2. Driver's license fees 3. Communications access fees and surcharges 4. Lottery and casino proceeds
			Extraordinary and Special Items	4330	Extraordinary and Special Items is defined in Directly Generated Funds. There are four object classes for Extraordinary and Special sources of funds. This one is for such funds that come from local sources. For example, agencies report county disaster relief funds in this object class.
			Other Local Funds	4390	These are funds from local government that cannot be considered either an allocation from the general revenues, or a dedicated fund. Other local funds typically include local grants or other miscellaneous local funds.
			State Government Funds	**4400**	These are funds received from state, commonwealth, or territory governments.
			General Revenues of the State Government	4410	There are essentially two common ways a state government can provide funds to a transit agency. 1. The government may allocate a portion of its general budget to transit without a dedicated source of funding. In this case, the transit agency annually competes for funding with other programs. The agency reports this non-dedicated funding as General Revenues of the State Government. 2. The agency reports dedicated sources of revenue under State Transportation Funds (4420).

State Transportation Fund	4420	Many states set up a State Transportation Fund that is separate from the General Fund. It usually has several dedicated sources of funding, often including funding sources such as fuel taxes, vehicle registration fees, or bonds backed by such sources. The Transportation Fund typically funds both transit agencies and other transportation needs such as the highway department. Agencies are not required to report the individual sources of funding that support the State Transportation Fund.
Extraordinary and Special Items	4430	Extraordinary and Special Items is defined in Directly Generated Funds. There are four object classes for Extraordinary and Special sources of funds. This one is for such funds that come from state sources. For example, agencies report state relief funds in this object class.
Federal Funds	**4500**	Federal funds generally fall into three categories: 1. Funds for operating assistance: Operating assistance funding is explicitly intended to be spent on operations, and in most cases requires 50% local match. 2. Funds for capital assistance: Capital assistance funding is required to be spent on capital, and in most cases requires 20% local match. 3. Funds for capital assistance spent on operations: In some cases, capital assistance may be spent on activities that are normally considered operating, such as preventive maintenance and Americans with Disabilities Act (ADA) service. This typically requires 20% local match. Although these funds are capital grants, the agency reports it as an operating expense because it spent the funds on operations. The local match portion of a grant is not part of the Federal Funds. It is part of Directly Generated Funds (4100), Directly Generated Dedicated Funds (4200), Local Government Funds (4300), or State Government Funds (4400). This includes in-kind matches such as land and services.
Non-Added Revenues	**4600**	Non-added revenues are funds received by the transit agency that are not included in the total funds earned during the operating period.
Contributed Services	4610	Contributed services are in-kind services received by the reporting agency from another entity or person where there is no payment for the services. Since there is no actual cost for the contributed service, the NTD includes the value of the service as non-added revenue. An example of a contributed service is when a retired lawyer provides pro-bono legal services to the local transit agency. On the other hand, when the transit agency is a part of a larger entity (like a department of city government) and the larger entity pays for the service, the reporter must report the cost of the service, as described in Full Cost of the Service.
Voluntary Non-Exchange Transactions	4620	This object class is for the receiver to record the non-exchange value when all applicable eligibility requirements have been met. In a voluntary non-exchange transaction, an agency gives or receives value (e.g., revenue vehicle) without directly receiving or giving equal value (e.g., cash) in return. This is different from an exchange transaction, in which each party receives and gives up essentially equal values. An example of a voluntary non-exchange transaction is when one government agency builds capital assets and transfers the assets to another transit agency that operates them. The recipient of a non-exchange transaction recognizes non-exchange receivables or funds when all applicable eligibility requirements have been met. Examples of eligibility requirements might include situations where the receiving agency is required to wait for a period of time before it has access to the transferred asset, or where the provider's transfer of asset is contingent upon an agreed upon action taken by the recipient. The agency records non-exchange receivables as current or noncurrent assets. The recipient reports resources transmitted before eligibility requirements are met as deferred revenues (liability). Providing agencies can find guidance for reporting the non-exchange transaction under the Reconciling Items: Voluntary Non-Exchange Transaction (5250).
Sales and Disposals of Assets	4630	Sales and disposals of assets include, but are not limited to sales of equipment, buildings, real estate and other property. Funds from sales and disposals of capital assets are not considered revenues earned because these transactions involve the conversion of existing assets into cash and not an increase in asset value. Consequently, NTD does not include this amount in the total funds earned during the reporting period. If an asset is sold for an amount higher than its book value (cost less accumulated depreciation), the agency records the difference between the sale price and book value as a gain in Other Agency Revenues (4150).
Transportation Development Credits	4640	In some states, funds spent on transportation at the state level can be used as a non-federal match for federal grants to transit agencies. These are known as Transportation Development Credits (TDCs) or toll credits. Since these credits are not actually used to cover expenses, NTD does not include these credits in the total funds earned.

Proposed Budget for Transportation Program

Statement of Need

Please provide a narrative interpretation of how the below budget reflects your agency's need. Explain the purpose of the grant request in terms of the need for funding availability (as opposed to project merits, which must be described in the Proposed Project Description). A description of any budget shortfall may be included. Please limit your response to the space provided.	The funds are necessary to maintain vehicles in a state of good repair and ensure Collier's TAM plan is being addressed as local funds have not been allocated for Capital projets. The grant funding is essential in order to replace four vehicles the associated equipment including (4) wireless routers, (4) radios and (4) tablets that have met their useful life.

Budget for Year of Anticipated Award

All applicants for all request types must complete this budget form. For each component, amounts reported should be based on projected values for the year of anticipated award for the current grant application.

Instructions: Amounts reflected in the Program Budget must be limited to those operating and administrative expenses/revenues supporting the applicant's transportation program. For agencies whose primary purpose is not transportation, the transportation program budget must be separated out from general administration and other agency functions. Shared costs such as facility rental and utilities must be allocated to the transportation program on a reasonable and specified basis.

Enable adding rows: ⊕ Disable adding rows: ⊖

Operating & Administrative Expenses

Instructions	Object Class	Code	Amount
Use drop-down to select	Services	5020	$5,634,000
Use drop-down to select	Fuel and Lubricants	5031	$1,053,300
Use drop-down to select	Miscellaneous Expenses	5090	$801,600
Use drop-down to select	Other Salaries and Wages	5013	$632,100
Use drop-down to select	Other Materials and Supplies	5039	$85,000
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
			$8,206,000

Operating & Administrative Revenues			
Instructions	Object Class	Code	Amount
Use drop-down to select	Passenger Fares	4110	$1,150,000
Use drop-down to select	Local Government Funds	4300	$6,971,000
Use drop-down to select	Other Agency Revenues	4150	$85,000
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
Use drop-down to select		-	
			$8,206,000

Activity Line Item Codes

Operating Assistance

Description	ALI Code
Operating Assistance	30.09.01

Vehicles

Description	ALI Code
Bus - Replacement Over 30'	11.12.03
Bus - Expansion Over 30'	11.13.03
Bus - Replacement Under 30'	11.12.04
Bus - Expansion Under 30'	11.13.04
Vans - Replacement	11.12.15
Vans - Expansion	11.13.15
Sedan - Replacement	11.12.16
Sedan - Expansion	11.13.16

Equipment

Description	ALI Code
Bus Passenger Shelters Acquisition	11.32.10
Shop Equipment Acquisition	11.42.06
ADP Hardware Acquisition	11.42.07
ADP Software Acquisition	11.42.08
Surveillance/Security (Bus) Acquisition	11.42.09
Fare Collection (Mobile) Acquisition	11.42.10
Support Vehicles Acquisition	11.42.11
Miscellaneous Equipment Acquisition	11.42.20
Radios Acquisition	11.62.03
Radios Construction	11.63.03

Preventative Maintenance

Description	ALI Code
Preventative Maintenance	11.7A.00

Mobility Management

Description	ALI Code
Mobility Management	11.7L.00

Facilities

Description	ALI Code
Admin Building Engineering & Design	11.41.01
Admin Building Acquisition	11.42.01
Admin Building Construction	11.43.01
Admin Building Rehab/Renovation	11.44.01
Admin Building Lease	11.46.01
Maintenance Facility Engineering & Design	11.41.02
Maintenance Facility Acquisition	11.42.02
Maintenance Facility Construction	11.43.02
Maintenance Facility Rehab/Renovation	11.44.02
Maintenance Facility Lease	11.46.02
Admin/Maint Facility Engineering & Design	11.41.03
Admin/Maint Facility Acquisition	11.42.03
Admin/Maint Facility Construction	11.43.03
Admin/Maint Facility Rehab/Renovation	11.44.03
Admin/Maint Facility Lease	11.46.03
Storage Facility Engineering & Design	11.41.04
Storage Facility Acquisition	11.42.04
Storage Facility Construction	11.43.04
Storage Facility Rehab/Renovation	11.44.04
Storage Facility Lease	11.46.04
Yards & Shops Engineering & Design	11.41.05
Yards & Shops Acquisition	11.42.05
Yards & Shops Construction	11.43.05
Yards & Shops Rehab/Renovation	11.44.05
Yards & Shops Lease	11.46.05

Current System Description	
Instructions:	The Current System Description Tab provides space for a short description of who the applicant is and what services they provide. The form is in a question and answer format with designated text boxes (the applicant's response to the question must not exceed the space provided or word counts where indicated). If the applicant is a CTC, relevant pages of a Transportation Disadvantaged Service Plan (TDSP) and Annual Operating Report (AOR) containing the above information may be uploaded to TransCIP.
Question:	**Response**
Please provide a brief general overview of the organization structure and type (i.e., government authority, private non-profit, etc.)	Collier Area Transit provides seasonal and permanent residents of Collier County with an accessible mode of travel under the Collier County Board of County Commissioners local government authority. These include seven days a week of fixed route and paratransit public services with approximately 19 to 20 routes per system on a daily basis. The paratransit program, which is called CATConnect, provides transportation services to individuals who do not have access to any other means of transportation and are eligible through several funding programs.
Program mission, goals, and/or objectives	The mission of CATConnect is to identify and safely meet the transportation needs of Collier County, through a courteous, dependable, cost effective and environmentally sound team commitment. CATConnect's goals are committed to implementing a fully integrated transportation system by enhancing the effectiveness of transfers between paratransit and fixed-route services. To deliver a seamless and efficient coordinated transportation service, CATConnect educates and publicizes fixed-route and paratransit services to current riders, the general public, agency-sponsored clients, visitors, and other potential customers. Moreover, CATConnect prioritizes safety in its operations and ensures the provision of high-quality transportation services.
Service, route, and trip types provided	The CATConnect pickup time may be as early as 4:00 AM and the latest pickup time may be as late as 7:00 PM. Our paratransit has approximately 25 routes and/or manifests each day using Collier County owned vehicles that cover trips in Naples, Everglades City, Immokalee, and Marco Island area. The trip types Collier provides are medical, nutritional, employment, educational or personal.
What are the sources of the transportation program's funding for operations (e.g., state, local, federal, private foundations, fares, other program fees?)?	The operations are funded through the Federal Transit Administration 5307, 5310 and 5311 programs, Florida Department of Transportation, Agency for persons with disabilities, Florida Commission for the Transportation Disadvantaged and local funding programs. These include funding for individuals with disabilities, low income, and elderly in both the urbanized and non-urbanized areas of the County.

How does your agency ensure that passengers are eligible recipients of 5310-funded transportation service? What proportion of passengers/clientele are seniors and/or individuals with disabilities?	All paratransit passengers go through an application process to ensure eligibility of the 5310 funded transportation services. All passengers need to renew their application every three years. 98% of the trips provided between 10/01/2023 - 9/30/2024 were provided to individuals that are seniors and/or individuals with disabilities.
To what extent does your agency serve minority populations? You may cite your agency's Title VI program to identify minority population groups served.	Collier Area Transit operates its programs and services without regard to race, color, or national origin in accordance with Title VI of the Civil Rights Act. CAT operates services to, from, and within areas identified with large minority populations. All of CAT routes serve a minority census block group, while 50 percent of the service provided has the majority (50 percent or more) of the service within minority census block groups. In addition, CAT provides over 700,000 Fixed Route trips each year within the Collier County area. CAT is continually providing information to LEP residents of the community.
Briefly describe your agency's vehicle maintenance program. Which services are outsourced (e.g., oil changes)? Explain how vehicles are maintained without interruptions in service.	All vehicles are maintained by the Collier County Fleet Management Division staff specifically assigned to Transit at the CAT Operations Center located at 8300 Radio Road. A preventative maintenance schedule for all CAT vehicles is maintained by fleet staff to ensure vehicles are maintained without interrupting transportation service.

Vehicle Request

Instructions:	Applicants must submit a full request description as part of the application. Responses must be entered in a question/answer format where indicated. Where a field or word count is included, the length of the applicant's response must not exceed the space or word count provided. The project description should not repeat the Current System Description.

Project Type	Examples
Expansion Vehicles	Expansion vehicles are defined as the acquisition of revenue vehicles for expansion of transit service. Whereas, replacement vehicles are the replacement of revenue vehicles who have reached the end of a minimum normal service life. If replacing a vehicle, agencies must identify the vehicle from the existing fleet that will be replaced and identify the age and mileage of the vehicle. —Large heavy- duty transit buses 35'-40' —Small heavy-duty transit buses 30'
Replacement Vehicles	—Minibus —Standard Cutaway —Minivan

Project Area		
Instructions:	Identify the geographic area(s) within which the proposed project will be constructed or primarily used. **The dropdown list of areas will display options within the district selected on the Request Overview & Eligibility sheet.**	Reference Map

Area:	Large Urban - Bonita Springs-Estero	Use drop-down to select service area

Project Description	
Instructions:	Describe the project being requested within the application.
The grant application is to purchase Four (4) Replacement Vehicles for paratransit service. The new vehicles will replace vehicles that will meet their useful life in 2025. By replacing the vehicles Collier County will be achieving its TAM Goal to maintain a state of good repair for rolling stock.	

Project-Related Improvements	
Instructions:	Describe how the grant funding will improve your agency's transportation service in one or more areas. If an area is not intended to be improved by the proposed project, indicate "Not Applicable". Applicants may also consider conducting scenario planning, cost-benefit analysis, and/or fiscal impact analysis to illustrate how transportation service will be enhanced.
Will the project allow your agency to: Provide more hours of service and/or more trips? How many more drivers will be available to your system with the addition of the requested vehicle(s)?	Grant funding will not provide more hours but will allow for the sustainment of the current service and increase reliability with the purchase of four replacement vehicles.
Expand service to a larger geographic area within the District? Please specify zip codes, or communities.	The Funding will not expand service, the funding will be utilized to ensure the existing service to the urbanized areas of Collier County with the purchase of four replacement vehicles.
Reduce headways/increase frequency?	Grant funding will not reduce headways/nor increase frequency.

Support a capital investment strategy in alignment with a Strategic Plan, Capital Improvement Plan, or Transit Asset Management Plan? *Example:* The vehicle replacements in this application were identified using the prioritization tool in agency's most recent TAM Plan, in order for the agency's fleet to meet its State of Good Repair targets.	The funding will support Collier County's TAM plan by ensuring vehicles are replaced as they meet their life expectency.
Address projected vulnerabilities? Examples of vulnerabilities related to the purchase of fleet vehicles include, but are not limited to: 1. Vehicle failure: Public transportation fleets rely on a variety of vehicle components. Shortages for vehicle components can lead to service disruptions, delays, and potential safety risks for passengers. 2. Lack of maintenance: Inadequate maintenance practices can result in breakdowns, accidents, and service disruptions. Regular maintenance and inspections are crucial to ensure the safety and reliability of the fleet.	Grant funding will be used to purchase four vehicles that have met their useful life. By replaceing these vehicles it reduces chances of vehicles breaking down, and disrupting transit service, as well as reduce the overall vehicle maintenance costs.
Expand access to essential services? Examples of essential services expansion include transportation to medical appointments, community engagement activities or transportation to individuals with disabilities or special needs.	The funding will not expand but maintain the existing transit service access to essential services to individuals with disabilities or no access to transportation services. Maintaining a vehicle replacement plan is a key element to ensuring continued access to essential services.
Enhance passenger experience (e.g., added amenities)?	Passenger experience will be enhanced by providing a reliable service with four new replacement vehicles that will allow CAT to reduce breakdowns by retiring four vehicles that have met their useful life.

Decreases transportation costs, improve access to mobility options, and spur economic activity in underserved/disadvantaged communities?	A reduction of costs will be captured in vehicle maintenance as four vehicles that have met their useful life shall be retired upon receipt of replacement vehicles.
Overcome any challenges or difficulties your agency is experiencing?	The funding will assist in meeting the demand for maintaining capital assets in a state of good repair. As vehicles age and experience wear and tear, the cost for maintenance and parts replacement become very expensive and place a heavy burden on the operating budget. These capital grant funds will alleviate some of that burden and allow the transit agency to allocate more funds towards the provision of the service itself.
If a grant award will be used to maintain services, specifically explain how it will be used in the context of total service. In the case that a grant award is granted to maintain services as opposed to expand them, it is important to explain how the award would still improve the overall operations and provision of transportation services. Make sure to include information on how the agency will maintain adequate financial, maintenance, and operating records and comply with FTA reporting requirements including information for the Annual Program of Projects Status Reports, Milestone Activity Reports, NTD reporting, DBE reports etc.?	All records including manifests and passenger information are in the Ecolane Software which requires an individual log in and password to access. All sensitive paper records are maintainted under lock and key and are kept for five to seven years in an archive room. Grant records are maintained by the Collier County Grants Compliance Office.
If this grant is not fully funded, can you still proceed with your transportation program? If applicable, consider how to reduce the size of the project to be consistent with the funding awarded.	Yes, the transportation program will continue to operate. However, the continued use of older vehicles will continue to reduce system reliability and increase maintenance cost as vehicles that should be retired will remain in revenue service.

Please provide a description of local support and coordination for the project. This can be exemplified by explaining the integration of the proposed project within a Transit Development Plan (TDP), Transportation Disadvantaged Service Plan (TDSP), a Comprehensive Plan, a Congestion Management Plan, Strategic Plan, Capital Improvement Plan, and/or other Transit Supportive Plans. Applicants should also include a list of all project parties involved in delivering the project and describe details on efforts to collaborate among stakeholders.	The funding has been identified as a plausible resource for maintaining our capital replacement within our Transportation Development Plan. Replacement vehicles have also been incorporated within our MPO process for unfunded projects list that is incorporated within the Transportation Improvement Program.

Project Readiness	
Instructions:	If the proposed project is for vehicles, equipment, or other capital items, please provide a detailed description of project activities:
If applicable, please provide any pertinent information used to make a determination on the reasonableness of cost, i.e., independent cost estimates, quotes, etc.	The cost estimate is based on the TRIPS contract
Please provide a full, detailed timeline of the project. The schedule should contain sufficient detail that identifies all steps or phases needed to implement the work proposed, and whether the proposed timeline is achievable. Moreover, the project schedule should identify all major project milestones. Examples of such milestones include approval of purchase orders, specifications, and estimates; procurement goals; delivery; installation; and invoicing FDOT for reimbursement.	Grant award and acceptance process about 2 to 3 months PO Request about a month Vehicle production and delivery about 6 to 9 months
If you are requesting a vehicle that requires a driver with a CDL, how will you ensure that your driver(s) maintain CDL certification	N/A This application is not requesting any vehicles that require a CDL certification.

If the requested vehicles will be used by a lessee or private operator under contract to the applicant agency, how will oversight be undertaken of the proposed lessee/operator? Has an equitable plan for distribution of vehicles to lessees and/or private operators been completed?	Collier County has a contract with MV Transportation Inc. who have drivers dedicated to the paratransit service. The vehicles will not be leased, they will be operated by Collier County's contracted vendor for the paratransit operations. Collier County staff (Fleet Management Division) is responsible for vehicle maintenance. The vehicle operators are regularly monitored to ensure that the vehicles are being used for their intended purpose.
Describe any local support and coordination or public outreach that has already occurred. Consider including a list of all parties involved in delivering the project and describe details on stakeholder collaboration efforts. If applicable, list any transit supportive plans that cite the proposed project. For example, is the project referenced in a Transit Development Plan (TDP), TDSP, a Comprehensive Plan, or a Congestion Management Plan? Some private nonprofit applicants may not have completed external outreach as part of the application development process. If this is the case, applicants should focus their response on their agency's interaction with the Community Transportation Coordinator (CTC) and any organizational contributions to the Transportation Disadvantaged Service Plan (TDSP) development or update process. Some private nonprofit applicants *will* have conducted local coordination that is appropriate to document in this field (e.g., meetings with funding partners, client surveys, and collaboration with other organizations).	The projects are referenced in the Transportation Disadvantaged Service Plan which went through an elaborate public outreach process. There will be no other project parties involved in the delivery of this project.

Proof of Local Match – Capital Projects

Instructions:

Local match amounts and sources must be clearly identified below. Reviewers will use the information provided here to determine whether proposed sources of local match are eligible and sufficient to support the requested award.

The Section 5310 federal share of eligible capital expenses may not exceed 80%. Some combination of state, local, or private funding sources must be identified and committed to provide the required non-Federal share. The non-Federal share may be cash, or in kind. Funds may be local, private, state, or (up to one half) unrestricted Federal funds. Funds may not include any borrowed against the value of capital equipment funded in whole or in part by State and/or Federal sources.

The Section 5310 Program permits up to one half the required match to be derived from other unrestricted Federal funds. Federal funds are unrestricted when a Federal agency permits its funds to match Section 5310. Essentially, all Federal Social Service Programs using transit services are unrestricted, such as Medicaid, employment training, vocational rehabilitation services and Temporary Assistance for Needy Families; other U.S. DOT Programs are not considered unrestricted Federal funds.

Contract revenue from the provision of transportation services to social service agencies may also be used as local match. The costs associated with providing the contract revenue service must be included in the project budget if using contract revenue as match. Non-cash, in-kind contributions such as donations of goods or services and volunteered services are eligible to be counted towards the local match only if the value of such is formally documented, supported and pre-approved by the District Office. Any funds committed as match to another Federal program may not be used to match Section 5310 funds. Local match may be derived from any non-U.S. Department of Transportation (USDOT) Federal Program, State Programs, Local Contributions or Grants.

Applicants may not borrow funds to use as match nor may they place liens on Section 5310-funded vehicles or equipment. The breakdown of funding for the Section 5310 grant program is 80% Federal, 10% State, 10% Local for capital projects, meaning the Federal share of eligible capital costs may not exceed 80% of the total award. State funds may support up to 10% of eligible capital costs with the remaining 10% being supported by a local match.

Supporting documentation must be uploaded into TransCIP.

Required Match (10%):		**$60,365**
Revenue Type *Use dropdown to select*	**Description**	**Amount**
Federal Government	80% federal funds	$482,918
State Government	10% state funds provided by FDOT	$60,365
Local Government	10% local cash match	$60,365
Total	-	**$603,648**

Vehicle and Equipment Request

Instructions:

All vehicle requests must be supported with a completed sample order form in order to generate a more accurate estimation of the vehicle cost. If using the TRIPS Contract, the order form can be obtained from http://www.tripsflorida.org/contracts.html:

1. Select Desired Vehicle (Cutaway, Minibus etc.)
2. Choose Vendor (use drop down arrow next to vendor name to see information)
3. Select Order Packet
4. Complete Order Form

If not using the TRIPS contract, a quote should be uploaded from the desired vendor. This supporting documentation should be uploaded in TransCIP. Once uploaded in TransCIP, applicants should check the box to indicate the forms have been uploaded.

Enable adding rows

Disable adding rows

Vehicle Request

Instructions:

Under Description, select the project type from the drop down box. Under Detail, which is required to complete, include lift or ramp and vehicle make. For example, 2023 Ford Transit with ramp. For Useful Life information, see reference table in Resources tab. In the Fuel Type, enter the main energy source for the vehicle (gasoline, diesel, electric, etc.) Please note, when filling out Passenger Seats and Wheelchair Positions, if both wheelchair positions are occupied the ambulatory seats will be reduced to eight (8). Any bus options that are part of purchasing the bus itself should be part of the vehicle request and NOT separated out under equipment. Cost estimates should be supported by order forms or quotes.

Requests should be listed in order of priority. Unit costs must be listed in whole numbers only. If more space is needed to accommodate your request, add more rows to the table by first clicking "Enable adding rows" above.

Instructions	Description	Detail	ALI	Fuel Type	Useful Life (Years)	Passenger Seats	Wheelchair Positions	Quantity	Unit Cost	Total Cost	Federal Share	State Share	Local Share	Order Form Completed
Use drop-down to select request description	Bus - Replacement Under 30'	2025 Chevrolet, Chevy 4500, Turtle Top Terra Transit MD, Cutaway 23'	11.12.04	Unleaded	5	12	2	1	$150,912	$150,912	$120,729	$15,091	$15,092	☑
Use drop-down to select request description	Bus - Replacement Under 30'	2025 Chevrolet, Chevy 4500, Turtle Top Terra Transit MD, Cutaway 23'	11.12.04	Unleaded	5	12	2	1	$150,912	$150,912	$120,729	$15,091	$15,092	☑
Use drop-down to select request description	Bus - Replacement Under 30'	2025 Chevrolet, Chevy 4500, Turtle Top Terra Transit MD, Cutaway 23'	11.12.04	Unleaded	5	12	2	1	$150,912	$150,912	$120,729	$15,091	$15,092	☑
Use drop-down to select request description	Bus - Replacement Under 30'	2025 Chevrolet, Chevy 4500, Turtle Top Terra Transit MD, Cutaway 23'	11.12.04	Unleaded	5	12	2	1	$150,912	$150,912	$120,729	$15,091	$15,092	☑
Use drop-down to select request description										$0	$0	$0	$0	☑
Use drop-down to select request description										$0	$0	$0	$0	☑
Use drop-down to select request description										$0	$0	$0	$0	☑
Use drop-down to select request description										$0	$0	$0	$0	☑
Use drop-down to select request description										$0	$0	$0	$0	☑
Use drop-down to select request description										$0	$0	$0	$0	☑
Total		-	-	-	-	48	8	4	-	$603,648	$482,916	$60,364	$60,368	-

Vehicles to be Replaced

Instructions: Vehicles listed for replacement must be included in the TransCIP 2.0 Inventory. If more space is needed to accommodate your list, add more rows to the table. List vehicles in order of priority for replacement.

FDOT Control #	VIN	Make	Type	Model	Year	Fuel Type	Ramp or Lift	Passenger Seats	Wheelchair Positions	Status	Mileage
10065	1FDES8PV1KKA49971	Ford	Transit	Transit	2019	Unleaded	Lift	8	2	Active	191161
10064	1FDES8PV3KKA49972	Ford	Transit	Transit	2019	Unleaded	Lift	8	2	Active	227186
10063	1FDES8PV5KKA49973	Ford	Transit	Transit	2019	Unleaded	Lift	8	2	Active	201541
10062	1FDES8PV7KKA49974	Ford	Transit	Transit	2019	Unleaded	Lift	8	2	Active	220194
Total/Average								**32**	**8**		**210,021**

Service Characteristics		
Service Characteristic	**If the grant is awarded**	**Data Collection/Calculation Method**
Unlinked Passenger Trips (UPT)	117,166	Paratransit Software
Unduplicated Passengers per Year	1,369	Paratransit Software

Equipment Request

Instructions:	Applicants must submit a full request description as part of the application. Responses must be entered in a question/answer format where indicated. Where a field or word count is included, the length of the applicant's response must not exceed the space or word count provided. The project description should not repeat the Current System Description.

Project Type	Examples
Equipment	—Fare boxes —Communications equipment —Security/surveillance equipment for vehicles and/or buildings —Shop equipment (alignment machines, bus washing machines, tire changers, etc.) —Bus shelters —Bus stop signage —Wheelchair lifts —Other miscellaneous equipment

Project Area		
Instructions:	Identify the geographic area(s) within which the proposed project will be constructed or primarily used. **The dropdown list of areas will display options within the district selected on the Request Overview & Eligibility sheet.**	Reference Map

Area:	Large Urban - Bonita Springs-Estero	Use drop-down to select service area

Project Description	
Instructions:	Describe the project being requested within the application.
General Project Description:	Purchase of needed eletronic equipment including (4) wireless routers, (4) radios and (4) tablets for new replacement vehicles for a total of $31,496.

Project-Related Improvements	
Instructions:	Describe how the grant funding will improve your agency's transportation service in one or more areas. If an area is not intended to be improved by the proposed project, indicate "Not Applicable". Applicants may also consider conducting scenario planning, cost-benefit analysis, and/or fiscal impact analysis to illustrate how transportation service will be enhanced.
Will the project allow your agency to: Provide more hours of service and/or more trips?	Grant funding will not provide more hours but will allow for the sustainment of the current service and increase reliability and safety with the purchase of four radios and tablets for the replacement vehicles.
Expand service to a larger geographic area within the District?	The Funding will not expand service.

Reduce headways/increase frequency?	Grant funding will not reduce headways/nor increase frequency.

Support a capital investment strategy in alignment with a Strategic Plan, Capital Improvement Plan, or Transit Asset Management Plan? *Example:* The equipment replacements in this application were identified using the prioritization tool in agency's most recent TAM Plan, in order for the agency's assets to meet State of Good Repair targets.	The equipment is part of the vehicle replacement, which has been identified within the TAM Plan.
Address projected vulnerabilities?	Grant funding will be used to purchase four radios and tablets in addition that have met their useful life. The vulnerabilities this application will address by replacing the equipment will be the maintainance of reliability and safety of the vehicles as they are forms of communication.
Expand access to essential services?	No the access will not be expanded.
Enhance passenger experience (e.g., added amenities)?	Yes, passengers will experience highten reliability by the utiliziation of technology to maintian operations on time.
Decreases transportation costs, improve access to mobility options, and spur economic activity in underserved/disadvantaged communities?	Reduction of cost to transporation is captured by the technology on the tablets that maximazes operational effiencie and radio will allow for safe communication with the operator.

Overcome any challenges or difficulties your agency is experiencing?	The funding will assist in meeting the demand for maintaining capital assets in a state of good repair.
If a grant award will be used to maintain services, specifically explain how it will be used in the context of total service. In the case that a grant award is granted to maintain services as opposed to expand them, it is important to explain how the award would still improve the overall operations and provision of transportation services.Make sure to include information on how the agency will maintain adequate financial, maintenance, and operating records and comply with FTA reporting requirements including information for the Annual Program of Projects Status Reports, Milestone Activity Reports, NTD reporting, DBE reports etc.?	The funding will be utilized to ensure that the bus service continues to operate at its current level. This will be achieved by using technology to track the buses and keep them on schedule. Additionally, radios will be used to maintain a reliable and secure means of communication with the bus drivers and dispatchers.
If this grant is not fully funded, can you still proceed with your transportation program? If applicable, consider providing an explanation of the scalability of the project?	Yes, the transportation program will continue to operate.

Project Readiness	
Instructions:	If the proposed project is for vehicles, equipment, or other capital items, please provide a detailed description of project activities:
If applicable, please provide any pertinent information used to make a determination on the reasonableness of cost, i.e., independent cost estimates, quotes, etc.	Estimates have been obtained from listed prices online and quote for vendor.

Please provide a full, detailed timeline of the project. The schedule should contain sufficient detail that identifies all steps or phases needed to implement the work proposed, and whether the proposed timeline is achievable. Moreover, the project schedule should identify all major project milestones. Examples of such milestones include approval of purchase orders, specifications, and estimates; procurement goals; delivery; installation; and invoicing FDOT for reimbursement.	Grant award and acceptance process about 2 to 3 months PO Request about a month equipment delivery about 9 months Post Deliver 3 months for final invoice
If the requested equipment will be used by a lessee or private operator under contract to the applicant agency, how will oversight be undertaken of the proposed lessee/operator? Has an equitable plan for distribution of equipment to lessees and/or private operators been completed?	Collier County has a contract with MV Transportation Inc. who have drivers dedicated to the paratransit service. The vehicles will not be leased, they will be operated by Collier County's contracted vendor for the paratransit operations. Collier County staff (Fleet Management Division) is responsible for vehicle maintenance. The vehicle operators are regularly monitored to ensure that the technology on the bus are being used for their intended purpose.
Describe any local support and coordination or public outreach that has already occurred. Consider including a list of all parties involved in delivering the project and describe details on stakeholder collaboration efforts. If applicable, list any transit supportive plans that cite the proposed project. For example, is the project referenced in a Transit Development Plan (TDP), TDSP, a Comprehensive Plan, or a Congestion Management Plan? Some private nonprofit applicants may not have completed external outreach as part of the application development process. If this is the case, applicants should focus their response on their agency's interaction with the Community Transportation Coordinator (CTC) and any organizational contributions to the Transportation Disadvantaged Service Plan (TDSP) development or update process. Some private nonprofit applicants *will* have conducted local coordination that is appropriate to document in this field (e.g., meetings with funding partners, client surveys, and collaboration with other organizations).	The projects are referenced in the Transportation Disadvantaged Service Plan which went through an elaborate public outreach process. There will be no other project parties involved in the delivery of this project.

Proof of Local Match – Capital Projects

Instructions:

Local match amounts and sources must be clearly identified below. Reviewers will use the information provided here to determine whether proposed sources of local match are eligible and sufficient to support the requested award.

The Section 5310 federal share of eligible capital expenses may not exceed 80%. Some combination of state, local, or private funding sources must be identified and committed to provide the required non-Federal share. The non-Federal share may be cash, or in kind. Funds may be local, private, state, or (up to one half) unrestricted Federal funds. Funds may not include any borrowed against the value of capital equipment funded in whole or in part by State and/or Federal sources.

The Section 5310 Program permits up to one half the required match to be derived from other unrestricted Federal funds. Federal funds are unrestricted when a Federal agency permits its funds to match Section 5310. Essentially, all Federal Social Service Programs using transit services are unrestricted, such as Medicaid, employment training, vocational rehabilitation services and Temporary Assistance for Needy Families; other U.S. DOT Programs are not considered unrestricted Federal funds.

Contract revenue from the provision of transportation services to social service agencies may also be used as local match. The costs associated with providing the contract revenue service must be included in the project budget if using contract revenue as match. Non-cash, in-kind contributions such as donations of goods or services and volunteered services are eligible to be counted towards the local match only if the value of such is formally documented, supported and pre-approved by the District Office. Any funds committed as match to another Federal program may not be used to match Section 5310 funds. Local match may be derived from any non-U.S. Department of Transportation (USDOT) Federal Program, State Programs, Local Contributions or Grants.

Applicants may not borrow funds to use as match nor may they place liens on Section 5310-funded vehicles or equipment. The breakdown of funding for the Section 5310 grant program is 80% Federal, 10% State, 10% Local for capital projects, meaning the Federal share of eligible capital costs may not exceed 80% of the total award. State funds may support up to 10% of eligible capital costs with the remaining 10% being supported by a local match.

Supporting documentation must be uploaded into TransCIP.

Required Match (10%):		**$2,212**
Revenue Type *Use dropdown to select*	**Description**	**Amount**
State Government	10% State funds provided by FDOT	$2,212
Local Government	10% reqired local cash match	$2,212
Federal Government	80% Federal funds	$17,695
Total	**-**	**$22,118**

Equipment Request	
Instructions:	All vehicle requests must be supported with a completed sample order form or Independent Cost Estimate in order to generate a more accurate estimation of the equipment cost. If using the TRIPS Contract, the order form can be obtained from http://www.tripsflorida.org/contracts.html: 1. Select Desired Equipment 2. Choose Vendor (use drop down arrow next to vendor name to see information) 3. Select Order Packet 4. Complete Order Form If not using the TRIPS, a quote should be uploaded from the desired vendor. This supporting documentation should be uploaded in TransCIP. Once uploaded in TransCIP, applicants should check the box to indicate the forms have been uploaded.
	Enable adding rows Disable adding rows

Equipment Request

Instructions: List the number of items under Quantity and select a Description from the drop down box that best describes your project. Under Detail, provide futher details, which is required to complete (i.e. two-way radio or stereo radio, computer hardware/software, etc.). If more space is needed to accommodate your request, add more rows to the table. The Department strongly encourages agencies seek quotes and/or independent cost estimates for equipment during the application development process to ensure full project cost is accounted for in the request. Unit costs must be listed in whole numbers only.

Detail should be provided at the item level: for example, if multiple types of equipment are being requested there may be multiple lines in the table with the same ALI code, but with different details (e.g., office furniture, tablets, other technology hardware), useful life, quantities, and unit costs. Quotes or independent cost estimates must be provided for each type of item.

Instructions	Description	ALI	Detail	Useful Life (Years)	Quantity	Unit Cost	Total Cost	Federal Share	State Share	Local Share
Use drop-down to select request description	ADP Hardware Acquisition	11.42.07	OnBoard Tablet w/Accesories (case/mount etc.)	5	4	$249	$997	$797	$99	$101
Use drop-down to select request description	Radios Acquisition	11.62.03	Vehicle Radio System	5	4	$2,259	$9,036	$7,228	$903	$905
Use drop-down to select request description	Miscellaneous Equipment Acquisition	11.42.20	Router/WiFi equipment	5	4	$3,021	$12,086	$9,668	$1,208	$1,210
Use drop-down to select request description							$0	$0	$0	$0
Use drop-down to select request description							$0	$0	$0	$0
	Total						$22,118	$17,693	$2,210	$2,215

Service Characteristics		
Service Characteristic	**If the grant is awarded**	**Data Collection/Calculation Method**
Unlinked Passenger Trips (UPT)	117,166	Paratransit Software
Unduplicated Passengers per Year	1,369	Paratransit Software

Operating Award Request

Instructions: Applicants must submit a full request description as part of the application. Responses must be entered in a question/answer format where indicated. Where a field or word count is included, the length of the applicant's response must not exceed the space or word count provided. The project description should not repeat the Current System Description.

Operating Award Requests should be entered in whole, even numbers only.

Operating Award Request			
Budget Category	**Total**	**Federal**	**Local**
Salaries		$0	$0
Fringe Benefits		$0	$0
Contractual Services		$0	$0
Other Direct Costs	$800,000	$400,000	$400,000
a.		$0	$0
b.		$0	$0
c.		$0	$0
d.		$0	$0
e.		$0	$0
f.		$0	$0
g.		$0	$0
h.		$0	$0
i.		$0	$0
j.		$0	$0
k.		$0	$0
l.		$0	$0
m.		$0	$0
n.		$0	$0
o.		$0	$0
p.		$0	$0
Indirect Costs		$0	$0
Total	**$800,000**	**$400,000**	**$400,000**
The above information should be transferred to Form 424.	The total should match 18g within Form 424.	The total should match 18a within Form 424.	The total should match 18d within Form 424.

Proof of Local Match – Operating Projects

	The Section 5310 federal share of eligible operating expenses may not exceed 50%. Some combination of state, local, or private funding sources must be identified and committed to provide the required non-Federal share. The non-Federal share may be cash, or in kind. Funds may be local, private, state, or (up to one half) unrestricted Federal funds. Funds may not include any borrowed against the value of capital equipment funded in whole or in part by State and/or Federal sources. The Section 5310 Program permits up to one half the required match to be derived from other unrestricted Federal funds. Federal funds are unrestricted when a Federal agency permits its funds to match Section 5310. Essentially all Federal Social Service Programs using transit services are unrestricted, such as Medicaid, employment training, vocational rehabilitation services and Temporary Assistance for Needy Families; other U.S. DOT Programs are not considered unrestricted Federal funds. Contract revenue from the provision of transportation services to social service agencies may also be used as local match. The costs associated with providing the contract revenue service must be included in the project budget if using contract revenue as match.
Instructions:	Non-cash, in-kind contributions such as donations of goods or services and volunteered services are eligible to be counted towards the local match only if the value of such is formally documented, supported and pre-approved by the District Office. Any funds committed as match to another Federal program may not be used to match Section 5310 funds. Local match may be derived from any non-U.S. Department of Transportation (USDOT) Federal Program, state
	The authorized representative that signs the proof of local match must be the same representative authorized by the Governing Board's Resolution. Supporting documentation of match funds must be uploaded into TransCIP. Proof may include, but is not limited to: (1) Transportation Disadvantaged (TD) allocation, (2) Letter on official letterhead from the applicant's CEO attesting to match availability and commitment, (3) Written statements from county commissions, state agencies, city managers, mayors, town councils, organizations, accounting firms and financial institutions.

Required Match (50%):	**$400,000**	
Revenue Type *Use dropdown to select*	**Description**	**Amount**
Local Government	General Fund	$400,000
	Operating Match Total:	**$400,000**

Project Area - Geographic Cost Allocation Methodology

Instructions:	Identify the geographic area(s) within which the proposed project will operate. Section 5310 operating projects may traverse urbanized area boundaries. Recipients must develop a method of allocating costs between disparate urbanized and non-urbanized areas. The availability of the information needed in any allocation method should be a factor in the selection of the method. Three methodologies are illustrated below: (1) by unique passengers, (2) by passenger miles, and (3) by passenger hours. Only one methodology may be selected, and the same methodology must be applied to all areas. Space is provided for three areas, though applicants may use fewer as needed. If electing to use another method, the applicant must attach documentation in TransCIP. Regardless of the number of areas served, complete the "Area 1" section FIRST. **The dropdown list of areas will display options within the district selected on the Application Cover Sheet.**
	A map of urban areas in Florida as defined by the 2020 Census is available at this link.

Large Urban - Bonita Springs- Estero			
Area 1:	an - Bonita Spring	Use drop-down to select service area	
Instructions:	Demand response service providers often know the addresses of all passengers. If 60% of all passengers live in a specified area, it is fair to say that 60% of all costs are eligible for funding within that area.		
Total Unduplicated Passengers	**Total Unduplicated Passengers Living in Area**	**% Service (by unduplicated passengers)**	**Distribution of Operating Request Total by Area**
Instructions:	Drivers' logs or client trip records can be maintained to segregate mileage or hours within the urbanized area and costs may be allocated accordingly.		
Total Passenger Miles	**Total Area Passenger Miles**	**% Service (by passenger miles)**	**Distribution of Operating Request Total by Area**
1765903	644884	**37%**	**$ 146,074.61**
Total Passenger Hours	**Total Area Passenger Hours**	**% Service (by passenger hours)**	**Distribution of Operating Request Total by Area**
5177264	2323779	**45%**	**$ 179,537.22**

Area 2			
Area 2:		Use drop-down to select service area	
Total Unduplicated Passengers	**Total Unduplicated Passengers Living in Area**	**% Service (by unduplicated passengers)**	**Distribution of Operating Request Total by Area**
0			
Total Passenger Miles	**Total Area Passenger Miles**	**% Service (by passenger miles)**	**Distribution of Operating Request Total by Area**
1765903		**0%**	**$ -**

Total Passenger Hours	Total Area Passenger Hours	% Service (by passenger hours)	Distribution of Operating Request Total by Area
5177264		0%	$ -

Area 3			
Area 3:		Use drop-down to select service area	
Total Unduplicated Passengers	Total Unduplicated Passengers Living in Area	% Service (by unduplicated passengers)	Distribution of Operating Request Total by Area
0			
Total Passenger Miles	Total Area Passenger Miles	% Service (by passenger miles)	Distribution of Operating Request Total by Area
1765903		0%	$ -
Total Passenger Hours	Total Area Passenger Hours	% Service (by passenger hours)	Distribution of Operating Request Total by Area
5177264		0%	$ -

Project Description	
Instructions:	Describe the project being requested within the application.

Funding is sought to sustain paratransit service for individuals with disabilities in Collier County, Florida, within the urbanized area. This service facilitates access to vital services for the eligible riders.

Project-Related Improvements	
Instructions:	Describe how the grant funding will improve your agency's transportation service in one or more areas. If an area is not intended to be improved by the proposed project, indicate "Not Applicable". Applicants may also consider conducting scenario planning, cost-benefit analysis, and/or fiscal impact analysis to illustrate how transportation service will be enhanced.
Will the project allow your agency to: Provide more hours of service and/or more trips?	Grant funding will assist with the ongoing growth of the service in the current area, it will not extend hours of service.
Expand service to a larger geographic area?	The Funding will not expand service, the funding will be utilized to ensure the existing service to the urbanized areas of Collier County is maintained.
Reduce headways/increase frequency?	Grant funding will not reduce headways/nor increase frequency.
Expand access to essential services	The funding will maintain the existing and continued growth of services, providing access to essential services for individuals with disabilities or those without access to transportation services.
Decreases transportation costs, improve access to mobility options, and spur economic activity in underserved/disadvantaged communities	The grant does not directly decrease transportation costs. However, it does improve access to mobility options by providing essential services to individuals with disabilities or those without access to transportation services. This increased access can indirectly spur economic activity by allowing individuals to reach employment opportunities, healthcare services, and other essential destinations.
Overcome any challenges or difficulties your agency is experiencing	Yes, the grant will assist in overcoming the challenges faced by our agency due to the increasing demand for transportation services. This increased demand puts a strain on our resources and capacity to meet the needs of all individuals, particularly those with disabilities or limited transportation options.

If a grant award will be used to maintain services, specifically explain how it will be used in the context of total service. In the case that a grant award is granted to maintain services as opposed to expand them, it is important to explain how the award would still improve the overall operations and provision of transportation services. Make sure to include information on how the agency will maintain adequate financial, maintenance, and operating records and comply with FTA reporting requirements including information for the Annual Program of Projects Status Reports, Milestone Activity Reports, NTD reporting, DBE reports etc.	The grant award will be utilized to both maintain existing transportation services and accommodate increased demand. To maintain existing services, funds will be allocated for operational costs. This will ensure the continued reliability and efficiency of the current service. This will enhance service capacity, improve passenger experience, and meet the evolving needs of the community. To ensure financial accountability and regulatory compliance, Collier County will leverage SAP for financial management, the Faster system for maintenance records, and dedicated staff for grant compliance. Operational statistics captured in the Paratransit software Ecolane will be used to generate reports for annual reporting, providing valuable insights into service performance.
If this grant is not fully funded, can you still proceed with your transportation program? If applicable, consider providing an explanation of the scalability of the project.	Yes, even if the grant is not fully funded, we can still proceed with our transportation program. Our project is scalable, allowing us to provide a range of service based on available funding.
Please provide a description of local support and coordination for the project. This can be exemplified by explaining the integration of the proposed project within a Transit Development Plan (TDP), Transportation Disadvantaged Service Plan (TDSP), a Comprehensive Plan, a Congestion Management Plan, Strategic Plan, and/or other Transit Supportive Plans. Applicants should also include a list of all project parties involved in delivering the project and describe details on efforts to collaborate among stakeholders.	The projects are referenced in the Transportation Disadvantaged Service Plan which went through an elaborate public outreach process. There will be no other project parties involved in the delivery of this project.

Service Characteristics		
Service Characteristic	**If the grant is awarded**	**Data Collection/Calculation Method**
Unlinked Passenger Trips (UPT)	117,166	Paratransit Software
Unduplicated Passengers per Year	1,369	
Vehicles Operated in Annual Maximum Service (VOMS)	36	
Vehicle Revenue Miles	1,400,463	
Daily Service Span (hours)	17	
Annual Days of Service	359	

Instructions for TransCIP Attachments

Each form and certification provides FDOT with information it must have to make required assurances to the Federal government and to make project selections. It is important that each required form and certification be complete and correct. Applicants should be aware that there are criminal sanctions for furnishing false information in order to obtain federal grants (18 U.S.C. 1001, Crimes and Criminal Procedure – Statements or entries generally).

The complete application should be uploaded into the Department's grant management system (TransCIP). Electronic resolutions, applications, and acceptance of grant awards are acceptable. Incomplete, illegible, or unsigned applications may be rejected.

Questions regarding Section 5310 applications or the application process should be directed to the FDOT District Office in the applicant's service area, as shown in the Resources tab. All signature pages must be completed following the board resolution date. Some forms may not be required based on the type of application being submitted, please review the following details to understand form requirements. Each applicant will be responsible for attaching applicable forms to project application within TransCIP.

1 - Grant Proposal Excel Workbook - Each program application should contain the Grant Proposal provided within this Excel Workbook. This workbook has a built in validation process to ensure completion based on the projects submitted. Once complete Excel Workbook should be uploaded to TransCIP within the associated opportunity.

2 - Cover Letter - A sample cover letter is included in the grant application for reference. The cover letter must be completed on agency letterhead and signed by the agency representative authorized in the Governing Board's Resolution. This representative must be the same individual referenced throughout the application as "the authorized agency representative." This ensures one consistent point of contact for questions and follow-up regarding the application.

3 - Governing Board's Resolution - A sample resolution form is included in the grant application for reference. The resolution must be completed on agency letterhead and signed by the chairperson of the agency's board. A new signed resolution must be submitted for each grant application and reference each program that is being applied for in that year.

4 - Public Hearing Notice - An opportunity for a public hearing is required ONLY for public agencies requesting capital grants under Section 5310. An application for Section 5310 submitted by a public agency should contain a copy of the notice of public hearing and an affidavit of publication. A sample public notice is in the application. A public notice should contain all pertinent information relating to the project (such as number and types of vehicles as well as the estimated cost of the vehicles) and should be published at least one time in a newspaper of general circulation in the applicant's service area, no less than 15 or more than 30 days prior to the submission of an application. The notice should state that persons requesting a hearing must notify the applicant of the request, in writing, and send a copy of the request for a hearing to the FDOT District Office.

5 - Coordinated Public Transit - Human Service Transportation Plan - This attachment is to be completed and signed by the individual authorized by the governing board of the applicant's agency and uploaded into TransCIP with the grant application. Please attach cited plan pages, ensuring use of the most current plan update.

6 - CTC Agreement or Certification - If the applicant is a CTC, this information should be uploaded in TransCIP using the appropriate link. A copy of the CTC's certification must be uploaded.

If the applicant is not a CTC, a copy of the written coordination agreement (or letter of support) between the applicant and the CTC in the appropriate service area should be uploaded. The agreement must be specific as to how the services to be provided will be complimentary to the services the CTC provides, and how duplication and fragmentation of services will be avoided.

If the applicant's service extends into areas covered by more than one CTC, copies of all applicable coordination agreements should be uploaded into TransCIP.
An executed Commission for the Transportation Disadvantaged Coordination Contract or similar document may serve as the written coordination agreement.
Applications submitted without the appropriate coordination agreement may be rejected by FDOT. Grant awards will not be made without an appropriate coordination agreement.

Agencies must keep their CTC Agreements current and valid at all times when receiving an award under the Section 5310 Program. Agencies must also keep their CTC Agreements current and valid every year until the vehicle(s) reaches its useful life requirement and the title is released.

7 - FDOT Certification and Assurances - To be completed and signed by the individual authorized by the governing board of the applicant agency and uploaded into TransCIP.

8 - Standard Lobbying Certification - All grant awards issued to a recipient in the amount of $100,000 or more must include a standard lobbying certification signed by the authorized agency representative.

9 - Leasing Certification - This certification must be completed by all applicants for capital assistance and signed by the authorized agency representative. This certification does not need to be completed if the applicant plans to lease the vehicle. It also must be completed to certify that the agency will NOT lease the vehicle if that is the case.

10 - Certification of Equivalent Service - The "Certification of Equivalent Service" must be completed for all non-accessible vehicles.

11 - Form 424: Application for Federal Assistance - ALL applicants must complete the Standard Application for Federal Assistance (OMB 4040-0004 Form 424). The code assigned to the Section 5310 Program in the Catalog of Federal Domestic Assistance is 20.513. This code should be shown in Section 11 of the form followed by the title: "Formula Grants for the Enhanced Mobility of Seniors and Individuals with Disabilities Program."

Further instructions for Form 424 can be found on the "Resources" tab with in this workbook.

12 - Federal Certifications and Assurances - The last page (Appendix A) of the annual Federal Register Notice that applies to Federal Certifications and Assurances provides applicants with a single signature page on which an applicant and its attorney must certify compliance with the requirements of the various FTA grants or cooperative agreements. The Federal Register Notice is revised annually and is usually available around January 1 of each year. Applicants may obtain a copy of the current year document through the internet at the FTA website. If unable to access the form, applicants may contact their FDOT District Office for assistance. The appropriate signed Federal certification/assurance form must be included in the application when it is submitted to the FDOT District Office.

If the FTA Certifications & Assurances are not available for the year of application, applicants may use the previous year's form. When the current year form becomes available, applicants must submit an updated form. The signature page for Federal Certifications and Assurances (include the page listing the certification categories) must be signed by the individual authorized by the applicant's governing board to sign and submit applications, and its attorney.

All applicants must use the current year form and it must be the actual form from the FTA. This form cannot be an edited version of a prior year's forms or a recreation of the form. DO NOT copy Federal Certifications & Assurances onto agency letterhead for signature, it will be returned to you and delay processing your grant request.

13 - Title VI Plan *(Required if not previously submitted to District)* - If an applicant has not previously submitted their Title VI plan to the Department, a copy must be included with the application. Returning applicants may provide the Title VI Concurrence letter.

14 - Protection of the Environment *(Required if the proposed project is for facilities)* - Most transit projects funded under Section 5310 will be classified by FTA as categorical exclusions. Examples of categorical exclusions include purchase of transit vehicles, and purchase of office equipment. If the proposed project is for construction or acquisition of facilities or other buildings, further evaluation may be required before a determination can be made that the project is a categorical exclusion. A Categorical Exclusion (CE) is described in 40 Code of Federal Regulations (CFR) 1508.4 and 23 CFR 771, as a project which, based upon experience with similar actions, does not individually or cumulatively have a significant environmental effect, and is excluded from the requirement to prepare an Environmental Assessment (EA) or an Environmental Impact Statement (EIS). Therefore, a project that qualifies as a CE generally requires a lower level of documentation. These projects do not bring significant impacts to planned growth or land use for the area; do not require the relocation of significant numbers of people; do not have a significant impact on any natural, cultural, recreational, historic, or other resources; do not involve significant air, noise, or water quality impacts; do not have significant impacts on travel patterns; and do not otherwise individually or cumulatively have any significant environmental impacts.

Types of projects that have been determined by FTA to qualify as CEs, and normally do not require any further National Environmental Policy Act (NEPA) approvals by FTA, are listed in 23 CFR 771.118(c). Additional actions which meet the criteria for a CE but may be designated as CEs only after FTA approval are listed in 23 CFR 771.118(d). In these cases, the applicant must submit documentation which demonstrates that the specific conditions or criteria for these CEs are satisfied and that significant environmental effects will not result. To meet the requirements of a CE determination, a proposed project may not be impermissibly segmented from a larger project. This means that a project may be proposed to be implemented in phases or as part of a larger undertaking, but must still demonstrate independent utility, connect logical termini, and should not restrict consideration of alternatives. In order to meet a CE designation, a proposed project cannot have substantial controversy on environmental grounds, or significant impact to properties protected by Section 4(f) of the US DOT Act (public park and recreation lands, wildlife and waterfowl refuges, and historic sites) or Section 106 of the National Historic Preservation Act (cultural resources including historic and archaeological sites). The presence of features such as wetlands and floodplains within the project area would likely also require additional documentation.

The applicant should contact the Florida Department of Transportation (FDOT) District Office for assistance with determining the level of documentation required. The FDOT will use a description of the proposed project, along with any maps or figures to assist with determining if a proposed project is likely to meet FTA criteria for a CE. See the Resources tab for a link to the FTA Region 4 Categorical Exclusion checklist.

15 - Local Clearinghouse Agency/RPC Cover Letter *(Required if proposed project is for facilities)* - If the grant application is for facilities, please include a copy of the cover letter submitted to the local clearinghouse agency or RPC.

16 - Organization Chart - Upload a full organizational chart for your organization into TransCIP as part of your application documents, this is required for all program applications regardless to type of project.

17 - Proof of Local Match - Supporting documentation of match funds must be uploaded into TransCIP. Proof may include, but is not limited to:

(1) Transportation Disadvantaged (TD) allocation,
(2) Letter on official letterhead from the applicant's CEO attesting to match availability and commitment,
(3) Written statements from county commissions, state agencies, city managers, mayors, town councils, organizations, accounting firms and financial institutions.

18 - Proof of Non-Profit Status - Upload proof of non-profit status (if a private-non-profit agency).

19 - Certification of Incorporation - Provide if applicant is a private-non-profit agency. Please visit https://dos.myflorida.com/sunbiz/start-business/efile/fl-nonprofit-corporation/ for more information

20 - Completed Sample Order Form - To identify vehicle type and estimated cost visit http://tripsflorida.org/. NOTE: All vehicle requests must be supported with a completed sample order form for estimating the vehicle cost. The order form can be obtained from http://www.tripsflorida.org/contracts.html

1. Select Desired Vehicle (Cutaway, Minibus etc.)
2. Choose Vendor (use drop down arrow next to vendor name to see information)
3. Select Order Packet
4. Complete Exhibit A (Order Form)

The Florida Department of Management Services Contract can be found at Florida Department of Management DMS (https://www.dms.myflorida.com/)

21 - Transportation Operating Procedure (TOP)/System Safety Program Plan (SSPP) - Most FDOT subrecipients fall under the requirements of Florida Administrative Code Rule 14-90. Some recipients only receive grant awards through the Federal Transit Administration's Section 5310 Program. The Transportation Operating Procedure (TOP) applies only to agencies receiving ONLY 5310 funds from FDOT/FTA. The TOP will include procedures related to maintenance, operations (Driver Training Policy), and safety. The agency's TOP will be subject to FDOT triennial review every 3 years (a template can be found within the FDOT State Management Plan).

All returning subrecipients must include the most recent TOP in the application package if revisions were made. If no revisions were completed, the returning subrecipient should upload the TOP approval letter issued by the local FDOT District. If an applicant is a first-time applicant, then the applicant should upload a commitment letter stating that a compliant TOP will be developed will be developed prior to award; no official award will be made by FDOT until the applicant has a fully adopted and FDOT approved TOP. Upon request, FDOT will provide technical assistance concerning the development of a TOP.

22 - Triennial Review- Closeout/Concurrence Letter or CAP - Required if the agency's latest Triennial Review included a CAP. The CAP is required once a deficiency and /or area of concern is identified after FDOT completes a triennial review and inspection. For more information see FDOT's Triennial Review Process as part of the State Management Plan at https://www.fdot.gov/transit/currentpages/navigation/grantsadministration.shtm.

You may upload other relevant documents such as project timelines, scopes or RFPs into TransCIP in the "Additional Documents" folder associated with the application.

I have read and understood the contents of this tab. ☑

Resources

Evaluation Criteria

Section 5310 funds shall be awarded to eligible recipients on the basis of merit and need in accordance with the below evaluation criteria:

GENERAL - USED FOR ALL PROJECTS	
Point Value	**Detail**
1. Project Description	
40 Points	Based on review team member assessment of project merit and District project priorities.
2. Need Assessment	
15 Points	**Financial Need:** Based on the review of the agency's budget and other factors outlined in scorecard criteria.
5 Points	**Service Gaps:** Based on identified supply and demand for transportation service to 5310-eligible populations in the project area (GIS web map).
Subtotal: 60 Points	

TRADITIONAL PROJECTS ONLY	
Point Value	**Detail**
1. Project Merits - New Sub-Recipient - Only	
30 Points	Category only used if the applicant does not currently provide transportation services.
2. Section 5310 Performance Measures	
20 Points	**Gaps in Service Filled:** Provision of transportation options that would not otherwise be available for seniors and individuals with disabilities measured in numbers of seniors and people with disabilities afforded mobility they would not have without program support as a result of the traditional Section 5310 project
20 Points	**Ridership:** Actual or estimated number of rides (as measured by one-way trips) provided annually for individuals with disabilities and seniors on Section 5310–supported vehicles and services as a result of the traditional Section 5310 project
Subtotal: Maximum 40 Points	

NON-TRADITIONAL PROJECTS ONLY	
Point Value	**Detail**
1. Project Merits - New Sub-Recipient - Only	
30 Points	Category only used if the applicant does not currently provide transportation services.
2. Section 5310 Performance Measures	
20 Points	**Service Improvements:** Increases or enhancements related to geographic coverage, service quality, and/or service times that impact availability of transportation services for seniors and individuals with disabilities. Service improvements may also be predicated by projects designed to provide **Physical Improvements:** Additions or changes to physical infrastructure (e.g., transportation facilities, sidewalks, etc.), technology, and vehicles that impact availability of transportation services for seniors and individuals with disabilities.
20 Points	**Ridership:** Actual or estimated number of rides (as measured by one-way trips) provided annually for seniors or individuals with disabilities on Section 5310 supported vehicles and services
Subtotal: Maximum 40 Points	
Total: 100 Points	

What's on the Market

Visit the FDOT TRIPS website (https://tripsflorida.org/) for all active contracts. The Florida Department of Management Services Contract can be found at the Florida Department of Management DMS website (https://www.dms.myflorida.com)

Navigate to: business_operations/state_purchasing/state_contracts_and_agreements/state_term_contract/motor_vehicles/pricing

FDOT Vehicle Useful Life Benchmarks 2006-2022

Vehicle Category (Source: FTA Useful Life of Transit Buses - 2007)			Light-Duty Van, Sedan or Bus		Light-Duty Van, Sedan or Bus		Light-Duty Van, Sedan or Bus		Light-Duty Mid-Size Bus		Light-Duty Mid-Size Bus		Light-Duty Mid-Size Bus		Medium-Duty Bus		Medium-Duty Bus		Medium-Duty Bus		Heavy-Duty Large Bus	
Vehicle Type (Source: NTD)	Equipment (non-revenue)		Automobile (AO)		Van (VN)		Van (VN)		Cutaway (CU)		Cutaway (CU)		Cutaway (CU)		Bus (BU)		Cutaway (CU)		Bus (BU)		Bus (BU)	
	Formerly Type "G"		Formerly Type "F"		Formerly Type "F"		Formerly Type "E"		Formerly Type "E"		Formerly Type "D"		Formerly Type "D"		Formerly Type "C"		Formerly Type "C"		Formerly Type "B"		Formerly Type "A"	
Vehicle Description (Source: TRIPS/DMS Contracts)	Service Trucks		Sedans/Station Wagons		Vans/Commuter Van (Unmodified)		Mini Vans (Modified)		MiniBus (Modified)		Transit Bus - Standard Cutaway		Small Cutaway		Transit Bus - Small Cutaway (Low Floor)		Medium Duty Bus (Arboc)		Medium Duty Bus (Champion)		Medium Duty Bus (El Dorado)		Heavy Duty	
Year	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**
2022	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2021	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2020	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2019	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2018	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000					10	350,000	12	500,000
2017	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000					10	350,000	12	500,000
2016	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000					10	350,000	12	500,000
2015	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2014	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2013	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2012	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2011	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2010	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	7	200,000			7	250,000	10	350,000	12	500,000
2009	5	150,000	4	100,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000			7	250,000	10	350,000	12	500,000
2008	5	150,000	4	100,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000			7	250,000	10	350,000	12	500,000
2007	5	150,000	4	100,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000			7	250,000	10	350,000	12	500,000
2006	5	150,000	4	100,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000			7	250,000	10	350,000	12	500,000

Useful Life Requirements

ASSET	USEFUL LIFE	SOURCE
	TROLLEYS	
Fixed guideway steel-wheeled	25 years	FTA Circular 5010.1D
Fixed guideway electric, rubber tires	15 years	FTA Circular 5010.1D
Simulated trolleys (rubber tires, internal combustion engine)	Refer to bus useful life	FTA Circular 5010.1D
Rail Vehicles	25 years, see circular	FTA Circular 5010.1D

FERRIES		
Passenger ferries	25 years	FTA Circular 5010.1D
Other ferries (w/o refurbishment)	30 years	FTA Circular 5010.1D
Other ferries (w/refurbishment)	60 years	FTA Circular 5010.1D
FACILITIES		
Buildings- concrete, steel and frame construction	40 years	FTA Circular 5010.1D
OTHER CAPITAL EQUIPMENT		
Fare boxes	10 years	Manufacturer /Industry Standards
Computer hardware	4 years	GAAP Guidelines/Industry Standards
Computer hardware- Domain controllers	4 years	Industry Standards
Mobile data computers (real-time dispatching)	7 years	Manufacturer
Computer software	4 years	GAAP Guidelines/Industry Standards
Computer software- HASTUS	4 years	Manufacturer
Computer software- ADP	4 years	Industry Standards
Scheduling/fleet management software	4 years	GAAP Guidelines/Industry Standards
Communications equipment, mobile radios, base stations	10 years	GAAP Guidelines/Industry Standards
Security/Surveillance equipment, cameras for vehicles	Same as useful life of vehicle	
Security/Surveillance equipment, cameras for buildings	10 years	Industry Standards
Shop equipment- Alignment machines, bus washing, tire changers	10 years	Manufacturer
Bus lift	20 years	Manufacturer
Wheelchair lift	Same as useful life of vehicle	
Bus shelters	15 years	Industry Standards
Bus shelter/stop benches	10 years	Manufacturer
Office furniture	10 years	Manufacturer
Carpeting	5 years	Manufacturer
Repeater tower	25 years	Manufacturer
Engine for bus/trolley	4 years	Industry Standards
Bus stop signage	10 years	Industry Standards
HVAC parts	5 years	Grantee experience
Asphalt parking lot	15 years	GASB
Thermal diesel particle filter cleaner	10 years	Manufacturer
Commercial roofing	15 years	Industry Standards

Local Clearinghouses / Regional Planning Councils (RPC)

Clearinghouse/RPC	Contact Information	Counties Covered
West Florida RPC 4081-A East Olive Rd. Pensacola, FL 32514	Austin Mount austin.mount@wfrpc.org (850) 332-7976 (800) 226-8914	Bay, Escambia, Holmes, Okaloosa, Santa Rosa, Walton, & Washington
Apalachee RPC 2507 Callaway Rd. Suite 200 Tallahassee, FL 32303	Chris Rietow crietow@thearpc.com (850) 488-6211	Calhoun, Franklin, Gadsden, Gulf, Jackson, Jefferson, Leon, Liberty, Wakulla
North Central Florida RPC 2009 NW 67th Place Gainesville, FL 32653-1603	Scott Koons skoons@ncfrpc.org (352) 955-2200 ext. 103	Alachua, Bradford, Columbia, Dixie, Gilchrist, Hamilton, Lafayette, Levy, Madison, Marion, Suwannee, Taylor, Union
Northeast Florida RPC 6850 Belfort Oaks Place Jacksonville, FL 32216	Eric Anderson eamderspm@nefrpc.org (904) 279-0880 ext. 178	Baker, Clay, Duval, Flagler, Nassau, Putnam, St. Johns
East Central Florida RPC 455 North Garland Avenue Fourth Floor Orlando, FL 32801	Brenda Defoe-Surprenant bdefoe-surprenant@ecfrpc.org (407) 245-0300 ext. 336	Brevard, Lake, Orange, Osceola, Seminole, Sumter, Volusia
Central Florida RPC Post Office Drawer 2089 Bartow, FL 33830	Marybeth Soderstrom msoderstrom@cfrpc.org (863) 534-7130 ext. 134	DeSoto, Hardee, Highlands, Okeechobee, Polk
Tampa Bay RPC 4000 Gateway Center Blvd. Suite 100 Pinellas Park, FL 33782-6141	John Meyer johnm@tbrpc.org (727) 570-5151 ext. 10	Citrus, Hernando, Hillsborough, Manatee, Pasco, Pinellas
Southwest Florida RPC 1926 Victoria Ave Fort Myers, FL 33901	Nicole Gwinnett ngwinnett@swfrpc.org (239) 338-2550 ext. 232	Charlotte, Collier, Glades, Hendry, Lee, Sarasota
Treasure Coast RPC 421 Southwest Camden Ave Stuart, FL 34994	Stephanie Heidt sheidt@tcrpc.org (772) 221-4060	Indian River, Martin, Palm Beach, St. Lucie
South Florida RPC 3440 Hollywood Blvd. Suite 140 Hollywood, FL 33021	Kathe Lerch klerch@sfrpc.com (954) 985-4416	Broward, Miami-Dade, Monroe

FDOT District Office Contacts

District 1	P.O. Box 1249 801 North Broadway Bartow, FL 33830-1249

Paul A. Simmons	(863) 519-2388 Paul.Simmons@dot.state.fl.us	District Modal Development Manager
Michelle Peronto	(863) 519-2551 Michelle.Peronto@dot.state.fl.us	Transit Programs Administrator
Dale Hanson	(863) 519-2321 Dale.Hanson@dot.state.fl.us	Transit Projects Coordinator (ATKINS) Counties: *Highlands, Hardee, Okeechobee, DeSoto, Polk*
Stacy Booth	(863) 519-2562 Stacy.Booth@dot.state.fl.us	Transit Projects Coordinator Counties: *Charlotte, Lee, Glades, Hendry*
Victoria Upthegrove	(863) 519-2484 Victoria.Upthegrove@dot.state.fl.us	Transit Projects Coordinator Counties: *Sarasota, Manatee, Collier*
Michele Forestt	(863) 519-2412 Michele.Forestt@dot.state.fl.us	Transit Support Consultant
District 2		2198 Edison Ave, MS 2806 Jacksonville, FL 32204
Doreen Joyner-Howard	(904) 360-5650 Doreen.Joyner-Howard@dot.state.fl.us	Modal Development Manager
Geanelly Reveron	(904) 360-5684 Geanelly.Reveron@dot.state.fl.us	Transit Manager
Janell Damato	(904) 360-5687 Janell.Damato@dot.state.fl.us	Rural/Urban Transportation Coordinator
Angela Gregory	(904) 360-5667 Angela.Gregory@dot.state.fl.us	Transportation Coordinator
District 3		P.O. Box 607 Chipley, FL 32428-9990
Scott Walters	(850) 330-1553 Scott.Walters@dot.state.fl.us	District Modal Development Manager
Debbie "Toni" Prough	(850) 330-1558 Debbie.Prough@dot.state.fl.us	Public Transit Program Specialist
District 4		3400 W Commercial Blvd. Ft. Lauderdale, FL 33309
Birgit Olkuch	(954) 777-4689 Birgit.Olkuch@dot.state.fl.us	District Modal Development Administrator
Lisa Maack	(954) 777-4683 Lisa.Maack@dot.state.fl.us	Passenger Operations Manager
Jayne Pietrowski	(954) 777-4661 Jayne.Pietrowski@dot.state.fl.us	Senior Transit Coordinator
Marie Dorismond	(954) 777-4605 Marie.Dorismond@dot.state.fl.us	Transit Coordinator
District 5		420 W. Landstreet Road Orlando, FL 32824
Brian M. Stanger, P.E.	(386) 943-5543 Brian.Stanger@dot.state.fl.us	District Modal Development Administrator
Libertad Acosta-Anderson, P.E.	(386) 279-5470 Libertad.Acosta-Anderson@dot.state.fl.us	Passenger Operations Manager
Jo Santiago-Mercer	(321) 319-8175 Jo.Santiago-Mercer@dot.state.fl.us	Transit Intermodal Supervisor
Carlos Colon	(321) 319-8173 Carlos.Colon@dot.state.fl.us	Transit Project Coordinator
Jamie Ledgerwood	(386) 943-5195 Jamie.Ledgerwood@dot.state.fl.us	Transit Project Coordinator
District 6		1000 N.W. 111 Avenue Miami, Florida 33172
Raymond Freeman	(305) 470-5255 Raymond.Freeman@dot.state.fl.us	Passenger Operations Manager
District 7		11201 N McKinley Dr. MS-7500 Tampa, FL 33612
Ming Gao	(813) 975-6923 Ming.Gao@dot.state.fl.us	District Modal Development Administrator
Chris Leffert	(813) 975-6403 Chris.Leffert@dot.state.fl.us	Transit Programs Administrator
Dave Newell	(813) 975-6195 Dave.Newell@dot.state.fl.us	Transit Coordinator

Glossary

Ambulatory - A person who is able to walk and move about freely without being confined to a bed or wheelchair.
Annual Operating Report (AOR) - A report outlining the expenses and revenues incurred during the preceding 12 months.
Applicant - An agency applying for Section 5310 Federal Assistance. See also "new applicant" and "recurring applicant."
Authorizing Federal and State Legislation - Legislation authorizing the Section 5310 program are: Fixing America's Surface Transportation Act (FAST Act) Section 3006; 49 U.S.C. Section 5310; FTA Circular 9070.1G; Section 341.051, Florida Statutes; and Chapter 14-73, Florida Administrative Code.

Community transportation coordinator (CTC) - A transportation entity recommended by an MPO, or by the appropriate designated official planning agency, as provided for in Sections 427.015(1), Florida Statutes, in an area outside the purview of an MPO, to ensure that coordinated transportation services are provided to the transportation disadvantaged population in a designated service area.

Contractor - The administering entity of the Transit Research Inspection and Procurement Services (TRIPS) who is under contract to the Florida Department of Transportation to establish statewide vehicle contracts for the purpose of procuring vehicles at the lowest cost possible while ensuring that the best product is available for the program. The Contractor is also responsible to coordinate, assist as needed, and report in all procurement activities under the Section 5310 Program.

Corrective Action Plan (CAP) – A required plan to address any deficiency and /or area of concern identified after FDOT completes a triennial review and inspection. For more information see FDOT's Triennial Review Process as part of the State Management Plan

Designated Official Planning Agency - A planning entity so designated by the Florida Commission for the Transportation Disadvantaged to conduct planning and support functions for the transportation disadvantaged services.

Disabled person - See elderly individual and persons with disabilities.
Disadvantaged Business Enterprise (DBE) - DBEs are for-profit, small business concerns where socially and economically disadvantaged individuals own at least a 51% interest and also control management and daily business operations.

District office - Florida Department of Transportation District Public Transportation Office or District Office of Modal Development and/or staff.

District Program of Projects (POP) - A district listing of each applicant agency for which a grant award is proposed, a description of the equipment to be awarded, and the proposed Federal, state and local share of the project cost. The district program of project includes certification by the District Office that all applicants and projects so proposed either meet all program requirements or will meet all program requirements before a Notice of Grant Award and/or Public Transportation Grant Agreement is executed.

Eligible expenses - Section 5310 funds may be used for the capital and/or operating expense of transportation services to seniors and/or individuals with disabilities. Eligible expenses are limited to buses, vans or other paratransit vehicles (including sedans and station wagons), radios and communications equipment, wheelchair lifts and restraints, vehicle rehabilitation, vehicle overhaul, data processing hardware/software, other durable goods such as spare components with a useful life of more than one (1) year and a per unit cost over $300, initial installation costs, vehicle procurement/testing, vehicle inspection and vehicle preventative maintenance, passenger facilities related to Section 5310-funded vehicles, support facilities and equipment for Section 5310-funded vehicles, operating costs associated with providing transit service, costs associated with transit service that exceeds the requirements of the Americans with Disabilities Act of 1990, projects that improve access to fixed route service and decrease reliance by individuals with disabilities on complementary paratransit, and alternative to public transportation that assist seniors and individuals with disabilities with transportation. An applicant applying for preventative maintenance costs must have a District approved maintenance plan and a cost allocation if activities are performed in house. The Federal share for eligible capital expenses may not exceed eighty percent (80%).

Eligible expenses, operating - For the Section 5310 program, eligible operating expenses include the total administrative, management, and operation costs directly incident to the provision of public transportation services less operating revenues. The federal share for net eligible operating costs may not exceed fifty percent 50%.

Eligible recipient, 5310 - For the Section 5310 Program, funds may be awarded to public agency Community Transportation Coordinators (CTCs), private-non-profit CTCs, and to private non-profit organizations providing transportation to seniors and/or persons with disabilities under a coordination agreement with a CTC. When the CTC is a private for-profit agency, the designated official planning agency responsible for designating the CTC may apply for Section 5310 funds, then sub-contract with the CTC for provision of service. Recipients must be either a CTC or providing service under the terms of a written agreement with a CTC. Agencies must keep their CTC Agreements current and valid at all times when receiving an award under the Section 5310 Program. Private taxi companies that provide shared-ride taxi service to the general public on a regular basis are eligible sub-recipients. "Shared-ride" means two or more passengers in the same vehicle who are otherwise not traveling together.

Expanded service - Adding a new service to an already existing system.

FDOT control number - Is assigned by the Contractor once the vehicle has been purchased, received and titled to the recipient with the Department of Transportation as the first lienholder**.**

Human service transportation - Transportation services provided by or on behalf of a human service agency to provide access to agency services and/or to meet the basic, day-to-day mobility needs of transportation-disadvantaged populations, especially individuals with disabilities, older adults, and people with low incomes.

Incurred - Commitment or obligation to spend funds for goods to be received or services to be rendered.

Individual with a disability - An individual who, because of illness, injury, age, congenital malfunction, or other incapacity or temporary or permanent disability (including an individual who is a wheelchair user or has semi-ambulatory capability), cannot use effectively, without special facilities, planning or design, public transportation service or a public transportation facility.

Job Access and Reverse Commute Program (JARC) - The Federal Transit Administration formula grant program for projects relating to the development and maintenance of transportation services designed to transport welfare recipients and eligible low-income individuals to and from jobs and activities related to their employment, and for public transportation projects designed to transport residents of urban and rural areas to suburban employment opportunities.

Limited English Proficiency (LEP) - Individuals who do not speak English as their primary language and who have a limited ability to read, speak, write, or understand English can be limited English proficient, or "LEP." These individuals may be entitled to language assistance with respect to a particular type of service, benefit, or encounter. DOT recipients are required to take reasonable steps to ensure meaningful access to their programs and activities by LEP persons.

Locally developed, coordinated public transit-human services transportation plan - means a plan that identifies the transportation needs of individuals with disabilities, older adults, and people with low incomes, provide strategies for meeting those local needs, and prioritizes transportation services for funding and implementation. Projects considered for Section 5310 funding must serve identified needs of the disabled population. A locally developed Transportation Disadvantaged Service Plan (TDSP) will qualify in most instances. All stakeholders identified in the circular must be included in the development of the TDSP.

Metropolitan Planning Organization (MPO) - MPOs are the policy and planning bodies, designated by the Governor, responsible for transportation planning in urban areas.

Minority persons include the following: (1) American Indian and Alaska Native, which refers to people having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment. (2) Asian, which refers to people having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. (3) Black or African American, which refers to people having origins in any of the Black racial groups of Africa. (4) Hispanic or Latino, which includes persons of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race. (5) Native Hawaiian or Other Pacific Islander, which refers to people having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

New applicant - An applicant for Section 5310 assistance that has not received an award in the last two fiscal years.

New service - A first time applicant starting a new service.

Non-ambulatory - A person who has a mobility impairment that prevents them from being able to walk or move about freely.

Nonprofit organization - A corporation or association determined by the U. S. Secretary of the Treasury to be an organization described by 26 U.S.C. Section 501(c) which is exempt from taxation under 26 U.S.C. Section 501(a) or one incorporated within Florida which is certified as not for profit by the Secretary of State.

One-way passenger trips - A person who rides a transportation vehicle in one direction between two points for a specific purpose.

Operating revenue - For Section 5310, operating revenue includes the sum of all fares paid by passengers, whether such fares are paid at the time service is provided or via a prepaid arrangement such as passes or tokens. Operating revenue excludes revenues from contracts with social service agencies that pay for transportation of social service clients.

Private organization - Non-public organizations, bodies which are not municipalities or other political subdivisions of the State of Florida; are not public agencies or instrumentalities of one or more states; are not Indian Tribes (except private nonprofit corporations formed by Indian Tribes); are not public corporations, boards or commissions established under the law of any state; or are not subject to direct control by public authority, Federal, State, county, or municipal.

Program of Projects (POP) - A list of projects to be funded in a grant application submitted to the Federal Transit Administration by the Florida Department of Transportation. The program of projects (POP) lists the sub-recipients and indicates whether they are private non-profit agencies or local governmental authorities, designates the areas served (including rural areas), and identifies any tribal entities. In addition, the POP includes a brief description of the projects, total project cost and Federal share for each project, and the amount of funds used for program administration from the ten percent (10%) allowed.

Public agency- An authority, commission, committee, council, department, division, bureau, board, section or any other unit or entity of the state or of a town, city, municipality, county or other local governing body.

Public transit - The transporting of people by conveyances or systems of conveyances, traveling on land or water, local or regional in nature, and available for use by the general public. Public transit specifically includes those forms of transportation commonly known as "paratransit" characterized by their non-scheduled, non-fixed route nature.

Public Transportation Grant Agreement (PTGA) - A contract between FDOT and a local sponsor of a transportation project, defining a project and FDOT's participation. PTGA's may be for one year or multiple years (up to five years), at the discretion of FDOT.

Recipient - The Florida Department of Transportation, a State Agency designated by the Governor to receive funds apportioned by formula to the States under Section 5310(b)(1), or a local government authority when Federal Highway Administration (FHWA) funds are flexed to Section 5310 to support services for individuals with disabilities.

Recurring applicant - An applicant for Section 5310 Federal Assistance who applies every year.

Rural areas - An area encompassing a population of fewer than 50,000 people that has not been designated in the most recent decennial census as an urban area by the Secretary of Commerce.

Seniors - An individual who is 65 years of age or older.

Sub-recipient - A private non-profit organization, if the public transportation service provided is unavailable, insufficient, or inappropriate; or a governmental authority that is approved by the State to coordinate services for elderly individuals and individuals with disabilities or certifies that there are not any non-profit organizations readily available in the area to provide the services.

Transit Development Plan (TDP) - A locally adopted document, addressing a minimum five-year time frame. It is prepared by the public transit provider, in cooperation with the appropriate Metropolitan Planning Organization. It is consistent with the applicable approved local government comprehensive plan. The TDP includes an assessment of the need for transit services in the local area, identifies the local transit policies, existing services and proposed service improvements, capital and operating costs of the proposed services, existing and proposed sources of funding and a staged implementation plan. A TDP is updated annually.

Transportation disadvantaged - Those persons who because of physical or mental disability, income status, or age, or who, for other reasons, are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are handicapped or high-risk as defined in Chapter 411.202 F.S.

Transportation Disadvantaged Service Plan (TDSP) - A plan developed by the CTC and approved by the Local Coordinating Board that identifies service gaps and provides recommended strategies to provide service in areas of need. The TDSP may serve as the Local Coordinated Human Services Transportation Plan. The TDSP is updated annually but includes a five-year planning window.

Transportation Improvement Program (TIP) - A continuing, cooperative and comprehensive planning process that delineates transportation improvements recommended for Federal and state funding during the program period. The MPO submits the TIP to the Florida Department of Transportation as required by Chapter 339, Florida Statutes.

Transportation operator contract - A written contract between the CTC and the transportation operator prepared at the local level that outlines the terms and conditions for any services to be performed.

Urban Area - An area encompassing a population of not less than 50,000 people that has been defined and designated in the most recent decennial census as an urban area by the Secretary of Commerce.

Form 424 Instructions

Item	Entry
1	Type of Submission should be "Application"
2	Type of Application should be "New"
3	"Not Applicable"
4	"Not Applicable"
5. A	"Not Applicable"
5 B	Federal Award Identifier (FTA Grant Number) is not needed at this time. This number will be assigned after submission of State POP.
6	State use only (if applicable)
7	State Application Identifier is "1001"
8.a, b, c, d e, f	Enter legal name of applicant, name of primary organizational unit (including division, if applicable), which will undertake the assistance activity, enter employer/taxpayer identification number (EIN/TIN) as assigned by Internal Revenue Service, enter the organization's UEI number (received from Dun and Bradstreet), enter the complete address of the applicant (including country), and name, telephone number, e-mail and fax of the person to contact on matters related to this application.
9	Type of Applicant 1: Select Applicant Type
10	Name of Federal Agency should be "Federal Transit Administration"
11	Catalog of Federal Domestic Assistance Number is: 20.513 CFDA Title should be: Enhanced Mobility of Seniors and Individuals with Disabilities
12	"Not Applicable"
13	"Not Applicable"
14	List the areas affected by project (cities, counties, states etc.). Can be submitted on a separate piece of paper.
15	Enter a brief descriptive title of the project. If appropriate (e.g., construction or real property projects), attach a map showing project location. This is where the applicant should define if the project is for capital or operating, e.g. capital purchase of vehicle(s) or operating assistance for transit services.
16	List (a) the applicant's Congressional District and (b) any Congressional District(s) affected by the program or project. Find your district here: https://www.house.gov/representatives/find-your-representative
17	Enter the proposed start date and end date of the project (dates must be within the same 12-month period/calendar year).
18	Enter the amount of the grant request. For **capital** applications, the federal amount is 80% of the total cost, the applicant amount is 10% of the total cost, and the state amount is 10% of the total cost. For **operating** applications, the federal amount is 50% of the total project cost and the applicant amount is 50% of the total project cost.
19	Check "c. Program is not covered by E.O. 12372."
20	Check the applicable box. If "yes", provide explanation in attachment.
21	Must be signed by the governing board representative that was authorized to sign this particular application.

Resources and Links

Procurement Guidance for Transit Agencies (June 2024)
Section 5310 FTA Circular
State Management Plan
Congressional Districts
Department of Management Services
Disclosure of Lobbying Activities
Federal Audit Clearinghouse
FTA Certifications & Assurances
My Florida Marketplace
Standard Form 424
Sunbiz
TransCIP – FDOT's Transit Grant Management System
TRIPS Florida
FTA NEPA Categorical Exclusion Checklist
FTA Mobility Management Brochure
Florida UZA Map

Florida Department of Transportation

Capital & Operating Assistance Application

49 U.S.C. Section 5311, CFDA 20.509

Formula Grants for Rural Areas

STOP: Before starting your application, make sure all agency profile information is up-to-date in TransCIP. The agency profile provides critical information. If the agency profile is incorrect, your application may be considered incomplete or ineligible for consideration.

Agency Name:	Collier County Board of County Commissioners	Use drop down to select or type to enter
Project Type(s):	Operating	Use drop-down to select
	Operating	Use drop-down to select
FDOT District:	One	Use drop down to select

Revenue Vehicle Inventory Certification

Instructions:

Applicants must ensure that the inventory in TransCIP is updated and includes all revenue vehicles. Only required fields must be completed. However, we encourage agencies to enter as much information as is readily available.

The name of the accountable personnel and date of last inventory update must be provided in the fields below.

Failure to update inventory information will have a negative impact on your application. This information is critical in determining need and replacement status. Additionally, lack of updated information may cause a service enhancement project to not receive funding.

Certification:	Omar DeLeon
Date:	10/29/2024

Transportation Program Operating and Administrative Expenses

Expenses: The Estimated Transportation Program Operating & Administrative Expenses table must include all expense associated with the applicant's transportation program. Expenses must be reported by type as provided in the Program Budget tab and the below definitions table:

1-digit Level:	Not applicable
2-digit Level:	**For example, 5010 Labor**
3-digit Level:	**For example, 5011 Operators Salaries and Wages**

Object Class	Code	Definition
Labor	**5010**	Labor expenses arise from the performance of work by employees. Labor expenses include pay and allowances owed to employees in exchange for the services provided to the transit agency. It also includes bonuses, shift differentials, overtime premiums, minimum guarantees, paid absences, and fringe benefits.
Operators' Salaries and Wages	5011	Operators' salaries and wages include the cost of labor, excluding paid absences and fringe benefits, for the transit agency's employees who are classified as revenue vehicle operators or crewmembers. These expenses include wages for performing activities related to vehicle operations such as: · Report time · Platform time · Turn-in time · Accident reporting time These expenses also cover wages paid to back-up (extra board drivers) such as stand-by time. In small transit systems, operators also may be scheduled to perform vehicle maintenance duties that are typically performed by vehicle maintenance employees. These duties may include servicing revenue vehicles (e.g., fueling, interior cleaning, and exterior washing) and limited inspection and maintenance of revenue vehicles. Operators sometimes are temporarily assigned duties other than driving their vehicles in revenue service such as: · training time either as a student or instructor · revenue vehicle movement control as dispatchers or road supervisors · movement of revenue vehicles among maintenance and operating facilities · maintenance of bus stops and shelters · general administration assignment such as customer service and marketing
Operators' Paid Absences	5012	This includes vacation leave, sick time, and other paid time off not contingent on a specific event outside the control of the transit agency for revenue vehicle operators or crewmembers.
Other Salaries and Wages	5013	This object class includes the cost of labor, excluding paid absences and fringe benefits, of employees of the transit agency who are not classified as revenue vehicle operators or crewmembers (e.g., maintenance workers, administrative staff, and transit managers).
Other Paid Absences	5014	This includes vacation leave, sick time, and other paid time off not contingent on a specific event outside the control of the transit agency for its employees that are not classified as revenue vehicle operators or crewmembers.

Transportation Program Operating and Administrative Revenues

Revenues: The Estimated Transportation Program Operating & Administrative Revenues table must include all funding sources used to support projected expenses. Revenues should be reported by type as provided in the application and the below definitions table:

1-digit Level:	**For example, 4100 Directly Generated Fares**
2-digit Level:	**For example, 4110 Passenger Fares**
3-digit Level:	**For example, 4111 Passenger-Paid Fares**

Object Class	Code	Definition
Directly Generated Funds	**4100**	Directly Generated Funds are funds that a transit agency earns from non-governmental sources. These revenues are generated by the transit agency.
Passenger Fares	4110	This revenue object class includes revenues earned from carrying passengers. This object class applies equally to directly operated (DO) and purchased transportation (PT) services. Generally, fares are the amounts paid by the rider to use transit services, to include the base fare, zone premiums, express service premiums, extra cost transfers, and quantity purchase discounts applicable to the passenger's ride. Agencies report the full amount of PT fare revenues regardless of whether the buyer or seller retains the revenue. Agencies may collect passenger fares in any of the following ways: 1. Before service is provided (e.g., through the sale of media such as passes, tickets and tokens sold to passengers) 2. Directly at the point of service (e.g., fare box, turnstile) 3. After the service is provided (e.g., through weekly or monthly billing) In some circumstances, several agencies share a fare card program and will periodically divide funds among themselves so that each agency within the program receives the appropriate amount of fare revenue. In such cases, each agency reports its share of the revenues. Passenger fares include Passenger-Paid Fares (4111) and Organization-Paid Fares (4112). Passenger fares do not include subsidies (e.g., subsidies from private organizations or subsidies from other sectors of operations), which are provided to support the general provision of transit service. Passenger fares also do not include fare assistance from other entities, such as governments, to provide a reduced fare or free fare for a general class of users (e.g., senior citizens, students). The agency reports subsidies and fare assistance in the appropriate private, state, local, or Federal Government sources of funds.
Passenger-Paid Fares	4111	Passenger-paid fares reflect the amount of the fare that the passengers pay on their own behalf. Passenger-paid fares may include the following examples: 1. Full Adult Fares: revenues earned by transporting passengers for the full adult fare. 2. Senior Citizen Fares: revenues earned by transporting passengers who pay a special, reduced fare because they are older than a prescribed age limit. 3. Student Fares: revenues earned by transporting passengers who pay a special, reduced fare because they are enrolled in an educational institution. 4. Child Fares: revenues earned from carrying passengers who pay a special, reduced fare because they are younger than a prescribed age limit. 5. Fares for Individuals with Disabilities: revenues earned from carrying passengers who pay a special, reduced fare because they are persons with disabilities. 6. Ferryboat Services: revenues earned from walk-on pedestrians, bicyclists, and public transportation vehicles passenger fares. For vehicles, the agency reports passenger fares for each occupant of the vehicle, including the driver. However, vehicle and bicycle ferriage fees are not included in passenger-paid fares but are reported in Non-public Transportation Revenues (4130). 7. Vanpool Services: For publicly sponsored vanpool (VP) services, passenger fares have unique provisions. For VP services, passenger fares include all fees and costs paid by the passengers. These costs often include fuel costs, maintenance expenses, lease payments, tolls and other out-of pocket costs. 8. Special Ride Fares: revenues earned from carrying passengers who pay a special, reduced fare for a reason other than those specified above. 9. Handling Fees: revenues earned from charges for processing payment and issuing fare cards (e.g., an agency charges an initial start-up fee when issuing new cards, or charges extra fees for using one-time paper cards). 10. No-show Fines: revenues earned from fines for demand response passengers who do not show up for a scheduled pickup.
Organization-Paid Fares	4112	Organization-paid fares are paid for by an organization rather than by the passenger. Organization-paid fares also include funds for rides given along special routes for which a beneficiary of the service may guarantee funds. Organization-paid fares may result from agreements between the reporter and an agency or organization that pays a set amount in return for unlimited and/or reduced fare transit service for the persons covered by the agreement. Examples of organization-paid fares may include the following: 1. State and Local Government: revenues earned by providing rides for employees of state and local government (e.g., fares for postal workers or police officers). 2. Reduced Fare Reimbursements: revenues earned by providing rides for its members or beneficiaries. A common example is a university paying a transit agency to permit students to ride free after showing their valid student identification cards. 3. Special Route Guarantees: amounts paid for by organizations other than governments (e.g., industrial firms, shopping centers, public and private universities) to guarantee a minimum amount of funds on a line operated and/or to provide or maintain services to a specific area, especially for the benefit of the paying organization. 4. Other Special Contract Transit Fares: revenues earned under contractual arrangements with non-government entities for transit fares other than those arrangements specified in the above categories. A common example is a senior center that pays part of the cost of a route serving the center.
Park-and-Ride Parking Revenue	4120	The agency earns park-and-ride parking revenue from parking fees paid by passengers who drive to park-and-ride facilities operated by the agency to use transit service. The agency reports revenues earned from the operation of parking lots that are not park-and-ride locations in Other Agency Revenues (4150).

Fringe Benefits	5015	Fringe benefits are the expenses for employment benefits that an employee receives in addition to his or her base salaries and wages. Fringe benefits include payments associated with the employee's labor that do not arise from the performance of work, but still arise from the employment relationship. Fringe benefits can be divided into the following four categories: 1. Employment Taxes: federal, Medicare, and Social Security taxes. 2. Health and Welfare Expenses: medical and dental insurance plans (to include hospital, surgical, and pharmaceutical plans); short-term disability and life insurance plans; workers' compensation or Federal Employees Liability Act Contribution; and unemployment plans. 3. Retirement Costs/Pension Plans: pension plans, long-term disability plans, and other postemployment benefits (OPEB). 4. Other Fringe Benefits: uniform and work clothing; tool allowances; employee and family transit passes; reimbursements for moving and education; assistance for dependent care, childcare, and adoption; employee discounts; and other fringe benefits not described in the categories listed above. Other Postemployment Benefits (OPEB) In addition to pensions, some transit agencies provide other postemployment benefits (OPEB). OPEB includes postemployment healthcare and life insurance that are provided separately from a pension plan.	Non-Public Transportation Revenues	4130	This object class includes revenue for providing transportation services to private groups or entities or for carrying freight. The most common examples are the following: 1. Charter Service Revenues: revenues earned from operating vehicles under charter service contracts. 2. Freight Tariffs: revenues earned from carrying freight on routes whose primary purpose is passenger operations. These are the revenues earned from carrying all types of freight on passenger routes. It includes fees for carrying vehicles and bicycles on ferries. See ferryboat services example in Passenger-Paid Fares (4111). 3. School Bus Service Revenues: revenues earned from operating vehicles under school bus contracts. It is the amount paid by schools for the operation of buses exclusively to carry children to and from school. 4. Sight-seeing Fares: revenues earned from operating vehicles in sight-seeing service.
Services	**5020**	Services are the labor and other work provided by outside organizations for fees and related expenses. Outside organizations may be private companies or public entities. The agency reports work done by personnel within the reporting unit as salaries and wages and fringe benefits. For example, if the reporting unit is a city, then transit-related work done by city employees, even those outside the transit division, is reported as salaries and wages and fringe benefits, not services. Services provided by an outside organization are usually procured as a substitute for in-house employee labor, except in the case of independent audits, which could not be performed by employees. Agencies usually substitute services for in-house labor because the skills offered by the outside organization are needed for only a short period of time or internal staff does not have the requisite skills. This object class includes all costs that are part of the service agreement. For example, if in a contract for custodial service the custodial company provides the cleaning supplies, the cost of these supplies belongs to Services, not Other Materials and Supplies. The services object class does not include purchased transportation service. A contractor that provides vehicle operators is considered a purchased transportation provider, and any other labor or materials provided by that contractor, including fuel, parts, and maintenance, belong to the purchased transportation object class.	Auxiliary Transportation Funds	4140	Auxiliary transportation funds are earned from activities related to the provision of transit service but are not payment for transit service. Auxiliary funds result from business-type activities in which an agency earns supplemental revenues. For example, a transit agency is not in the advertising or concessions business, but it is able to earn additional funds by providing or leasing out these additional services to the public. Auxiliary funds include the following: 1. Advertising revenues 2. Concessions 3. Other auxiliary transportation revenues
Materials and Supplies	**5030**	The expenses in the following three object classes include products obtained from outside suppliers or those manufactured internally. The cost of the material or supply includes freight-in, purchase discounts, cash discounts, sales taxes, and excise taxes (except on fuel and lubricants). Charges to this object class include both materials and supplies issued from inventory for use, and materials and supplies purchased for immediate use (i.e., items used without going through inventory).	Advertising Revenues	4141	Advertising revenues include funds earned from displaying advertising materials on transit system vehicles and property and includes agency media.
Fuel and Lubricants	5031	This object class includes fuel used to propel revenue and non-revenue vehicles and lubricants such as motor oil, transmission fluid, and grease. Purchase and cash discounts are included in the cost of the fuel or lubricant. Sales or excise taxes are not included in the cost; they are reported separately under Taxes (5060). The agency reports fuel costs net of fuel taxes, even if the agency paid the taxes initially and was later reimbursed. Note that modes powered by electricity report propulsion power under Revenue Vehicle Operation Utilities.	Concessions	4142	Concessions are revenues earned from granting operating rights to businesses (e.g., newsstands, candy counters) on property and equipment maintained by the transit agency (e.g., stations, vehicles). This also includes revenues from vending machines available on property maintained by the transit agency for public use.
Tires and Tubes	5032	This object class includes the cost of tires and tubes, whether they are rented, leased or purchased. Do not report rented and leased tires and tubes under Operating Lease Expenses (5220). Purchase discounts, cash discounts, sales taxes, and excise taxes are included in the cost of the tires and tubes.	Other Auxiliary Transportation Revenues	4149	The agency earns other auxiliary transportation revenues from auxiliary operations other than those specified above. This might include, but is not limited to merchandising, photo identification (ID) fees, locker rentals, movie licensing fees, naming rights, and fines for fare evasion or illegal parking.
Other Materials and Supplies	5039	The expenses in this object class include products obtained from outside suppliers or those manufactured internally that are not covered in the two preceding object classes. The cost of the material or supply includes shipping costs, purchase discounts, cash discounts, sales taxes, and excise taxes. Costs associated with this object class include materials and supplies issued from inventory or purchased for immediate use (i.e., items used without going through inventory).	Other Agency Revenues	4150	This object class includes revenues earned from activities not associated with the provision of the transit agency's transit service. Other agency revenues do not include funds received from local, state, or federal governments. Examples of other agency revenues include: 1. Sales of Maintenance Services: revenues earned from sales or performing maintenance services on property not owned or used by the transit agency. 2. Sales of Fuel: revenues earned from sales of fuel. 3. Sales of Assets: revenue received in the sale of an asset that is in excess of the asset's book value. See Sales and Disposals of Assets (4630) for a detailed example. 4. Rental of Revenue Vehicles: revenues earned from leasing transit agency revenue vehicles to other operators. 5. Rental of Buildings and Other Property: revenues earned from leasing transit system buildings (other than station concessions) and property to other organizations. 6. Rental of Real Estate: revenues earned from leasing real estate owned by the transit agency to other organizations. This includes revenues from joint development projects. 7. Rental Car Fees: revenues earned from rental car services. 8. Investment Income: revenues earned from investing in marketable securities and dividends received from state insurance pools. Investment income does not include earnings on capital grant funds advanced by the grantor; such earnings are to be credited to the same account as the capital grant itself. 9. Interest Income: revenues earned by placing funds in an interest-bearing account. 10. Student Fees: revenues generated by an educational institution from student fees to operate its own transit service. Student fees are different from student fares, which are amounts paid by the students for transit service. 11. Parking Facilities Revenue: revenues earned from parking fees generated from parking facilities not normally used as park-and-ride locations. Revenues earned from operating park-and-ride facilities are reported in Park-and-Ride Parking Revenue (4120). 12. Donations: funds from donations and grants from private foundations. 13. Other Agency Revenues: revenues that might include, but are not limited to: warranty claims, funds from lawsuits, Freedom of Information Act (FOIA) requests, revenue from vending machines available exclusively for employee use, administrative fees charged to other organizations,
Utilities	**5040**	This object class includes expenses for electricity, gas, water, telephone, heating oil, fuel for backup generators, and internet.	Revenues Accrued through a Purchased Transportation Agreement	4160	This object class includes revenue accrued by the transit agency as a seller of transportation services through purchased transportation agreements. This includes the contract funds earned (payments and accruals) by a reporter under contract to another reporter or public agency. The purchased transportation agreement must meet the requirements for a true Contractual Relationship. Revenue accrued through an agreement that does not meet these requirements is reported as Organization-Paid Fares (4112), Other Agency Revenues (4150), Local Government Funds (4300), or State Government Funds (4400), as appropriate.

Casualty and Liability Costs	**5050**	Expenses related to loss protection and losses incurred by the transit agency. These expenses include: · Compensation of others for their losses due to acts for which the transit agency is liable. · The costs of protecting the transit agency from losses through conventional insurance and other risk financing programs (e.g., self-insurance and insurance pools). · Agency losses due to the liable actions of others that are covered by other corporate insurance. Note that refunds and paybacks received from state insurance pools are netted from Casualty and Liability Costs. Transit agencies often incur self-insurance costs. Note that premiums also include self-insurance costs. Casualty and Liability Costs include the following: 1. Premiums for Physical Damage Insurance: premiums applicable to the reporting period to insure the transit agency from loss through damage to its own property caused by collision, fire, theft, flood, earthquakes and other types of losses. 2. Premiums for Public Liability and Property Damage Insurance: premiums applicable to the reporting period to insure the transit agency against loss from liability for incidents by the transit agency which cause damage to the person or property of others. 3. Payouts for Insured Public Liability and Property Damage Settlements: payments (or accruals) of actual liability to others arising from culpable acts of the transit agency that are covered by public liability insurance. 4. Payouts for Uninsured Public Liability and Property Damage Settlements: payments (or accruals) of actual liability to others arising from culpable acts of the transit agency that are not covered by public liability insurance. 5. Provision for Uninsured Public Liability and Property Damage Settlements: periodic estimates of liability to others arising from culpable acts of the transit agency that relate to the current period that are not covered by public liability insurance. 6. Premiums for Other Corporate Insurance: premiums applicable to the reporting period to insure the transit agency from losses other than damage to its property or liability for its culpable acts (e.g., fidelity bonds, business records insurance). 7. Other Corporate Losses: charges for actual losses resulting from events covered by the other corporate insurance. The agency reports costs of employees engaged in insuring and processing claims for and against the reporting agency in Labor, as appropriate. The agency reports the costs of repairing damaged property in Labor and Other Material and Supplies (5039), as appropriate. The costs of writing off property damaged beyond repair are reported as Extraordinary or Special Items (5280), depending on the circumstances of the impairment.	Subsidy from Other Sectors of Operations	4170	Occasionally, the transit operation is only one part of a larger transportation entity. Such transit agencies may receive subsidies from other sectors of operations within the larger transportation entity to help cover the cost of transit. For example, a transportation authority that is responsible for airports, ports, or bridges, as well as for public transit, may apply excess funds from airport operations to transit operations. Subsidies from other sectors of operations may include: · Subsidies from utility rates where the transit agency is a utility company · Subsidies from bridge and tunnel tolls owned and operated by the transit agency · Subsidies from other sources provided by the same entity that operates the transit service
Taxes	**5060**	Tax expenses are the charges and assessments levied against the transit agency by federal, state and local governments. Sales taxes, excise taxes, freight-in and other acquisition costs are not included in this object class. Instead, they are accounted for as part of the cost of the material or service purchased. Reimbursement of Taxes Paid Reimbursement, or refunds, of taxes paid include the receipt or accrual of state government payments to help cover the cost of taxes incurred by the transit agency. Reimbursement of taxes is netted from the associated expense on which the tax was originally levied. The agency does not report reimbursements of taxes as revenue. For example, some states reimburse transit agencies for taxes paid on fuel. Agencies net refunds of fuel taxes from fuel tax expense, rather than reporting them as revenue.	Extraordinary and Special Items	4180	Extraordinary items are events or transactions that are distinguished by their unusual nature and by the infrequency of their occurrence. 1. Unusual nature means that the underlying event or transaction has a high degree of abnormality and is clearly unrelated to, or only incidentally related to, the ordinary and typical activities of the transit agency. 2. Infrequency of occurrence means that the underlying event or transaction would not reasonably be expected to recur in the foreseeable future, taking into account the environment in which the transit agency operates. Special items are events or transactions that are either unusual in nature or infrequent, but not both. The agency determines an extraordinary event or transaction to be material if it is material in relation to the agency's income before extraordinary items, to the trend of annual earnings before extraordinary items, or is material by other appropriate criteria. Examples of material extraordinary items include recoveries received for damages from a natural disaster, such as a hurricane or earthquake. Assets impaired by and recoveries received from these events are considered extraordinary because they are abnormal in occurrence and are not reasonably expected to recur in the foreseeable future. Extraordinary and special items are distinguishable from normal operating items and are thus reported separately. The nature and financial effects of each event or transaction is disclosed on the face of the statement of activities or in the notes to the financial statements. There are four object classes for Extraordinary and Special sources of funds. This one is for such funds that are directly generated. For example, agencies report insurance recoveries for property damaged in a natural disaster in this object class.
Purchased Transportation Expenses	**5100**	Purchased Transportation (PT) expenses include the payments or accruals to sellers or providers of service, including fare revenues retained by the seller. It does not include the capital leasing portion of the contract. Purchased vanpool service has its own unique issues. Please refer to Vanpool for more detail.	Total Recoveries	4190	Total recoveries include proceeds recovered from insurance companies to indemnify the transit agency for insured acts that resulted in a liability for damage to transit personnel or property or damage to the person or property of others. Total recoveries include monies received for items or events that are not classified as Extraordinary or Special (4180). For example, the agency reports proceeds received from insurance companies for physical damage claims resulting from an accident as insurance recoveries. Total recoveries also include amounts recovered from others held liable to damage to the transit agency's property. For example, the agency reports proceeds received from third parties involved in an accident as insurance recoveries. The agency reports full proceeds received from the insurance company as insurance recoveries; the agency does not net monies from the related asset replacement cost.
Purchased Transportation in Report	5101	This object class includes the payments or accruals to sellers or providers of service, including fare revenues retained by the seller. The agency reports Purchased Transportation (PT) expenses in this object class when they report the associated service in their own NTD report. If the other party reports the service, the expenses belong to the object class Purchased Transportation Filing Separate Report (5102). Please refer to Reporting Contractor Expenses for more information.	**Directly Generated Dedicated Funds**	**4200**	This object class includes taxes and fees levied by a transit agency that is organized as an independent political entity with its own taxation authority. The revenues to the transit agency originating from local, state, or federal governments, which have been raised through the taxing authority of the grantor governmental unit, are considered Local Government Funds (4300), State Government Funds (4400), or Federal Funds (4500).
Purchased Transportation Filing Separate Report	5102	The agency reports Purchased Transportation (PT) expenses in this object class when the other party reports the associated service data (e.g., miles, ridership) in their own NTD report. The agency that reports the service data then reports Purchased Transportation (PT) expenses in the object class Purchased Transportation in Report (5101). Reporting Contractor Expenses The expenses in this object class must include the total amount paid by the buyer to the seller. The seller's actual expenses are often less than this amount, since the seller receives a profit included in the expenses paid by the buyer; the actual expenses will be greater than the amount paid if the seller suffers a loss. Since buying agencies are reporting, the expenses recorded are the buyer's expenses, and the buyer reports the total amount paid to the seller.	Income Taxes	4210	Revenues earned by taxing the income of individuals and/or organizations subject to the taxing authority of the transit agency.

Miscellaneous Expenses	**5090**	This object class includes expenses that cannot be attributed to any of the other expense object classes. Agencies must check to be sure an expense does not belong in a different object class before reporting it as miscellaneous. Some common miscellaneous expenses are listed below. 1. Dues and Subscriptions: Fees for membership in industry organizations and subscriptions to periodicals. 2. Travel and Meetings: Air, train or bus fares and allowances for transportation of traveling transit agency employees and related officials. In addition, this expense includes food and lodging, charges for participation in industry conferences, and other related business meeting expenses. 3. Bridge, Tunnel, and Highway Tolls: Payments made to authorities and other organizations for the use of bridges, tunnels, highways, and other facilities. 4. Entertainment Expense: Costs of social activities and other incidental costs relating to meals, beverages, lodgings, transportation, and gratuities. 5. Charitable Donations: Contributions to charitable organizations made by the transit agency. 6. Fines and Penalties: Costs of fines and penalties incurred by the transit agency. 7. Bad Debt Expense: Amounts owed to the transit agency that the agency has determined to be uncollectable.	Sales Taxes	4220	Revenues earned by taxing sales of goods and/or services subject to the taxing authority of the transit agency.
ADA Expenses	**5910**	The Americans with Disabilities Act of 1990 (ADA) prohibits discrimination and ensures equal opportunity for persons with disabilities in employment, state and local government services, public accommodations, commercial facilities, and transportation. Agencies must report the total expenses that result from ADA requirements for complementary paratransit in demand response (DR) and demand response-taxi (DT) modes. In this object class, agencies report the portion of their operating expenses that is attributable to ADA-required service. This object class is not exclusive of other operating expense object classes. For example, if you spent $10,000 on vehicle fuel, and $1,000 of this was to fuel a vehicle used for ADA service, then you would report $10,000 under Fuel and Lubricants (5031) and $1,000 under ADA Expenses (5910).	Property Taxes	4230	Revenues earned by taxing property subject to the taxing authority of the transit agency.
Reconciling Items	**5200**	Reconciling items are expenses that are not included as capital expenses or as mode-specific operating expenses. If reconciling items represent cash expenditures such as operating lease expenses, the agency reports them as Funds Applied. The agency reports non-cash expenditures such as depreciation as Funds Not Applied.	Fuel Taxes	4240	Revenues earned by taxing fuel subject to the taxing authority of the transit authority. This object class was previously known as gasoline taxes but includes all fuel taxes.
Interest Expenses	5210	Interest expenses are charges for the use of capital borrowed by the transit agency. Interest expenses may accrue on both short-term debt and Long-Term Debt obligations. 1. Interest on Long-Term Debt Obligations: charges for the use of capital borrowed on a long-term basis (the liability for which is usually represented by bonds or loans) employed in the operation of the transit system. Interest charges pertaining to construction debt that are capitalized will not be reflected as interest expense. 2. Interest on Short-Term Debt Obligations: charges for the use of capital borrowed on a short-term basis employed in the operation of the transit agency.	Other Taxes	4250	Revenues earned by levying other taxes by the authority of the transit agency. Examples include cigarette/tobacco, payroll, excise, and vehicle rental taxes.
Operating Lease Expenses	5220	Operating lease expenses include payments for the use of Capital Assets not owned by the transit agency. Operating leases allow the transit agency to use assets, but do not allow them the rights of asset ownership (e.g., transfer of title). As such, operating leases are not capitalized as assets, but are recorded as operating expenses during the reporting period. Some operating leases include costs that the agency must separate out and report under Services (5020). If part of the lease cost covers a service, rather than just the cost of the use of the asset, the agency reports this under Services (5020) rather than operating lease expenses. This also applies to Capital Leases (5230) and Related Parties Lease Agreements (5240).	Bridge, Tunnel, and Highway Tolls	4260	Tolls enacted by the authority of the transit agency on bridges, tunnels, highways, or other roadways, except High Occupancy Vehicle (HOV) toll revenues.
Capital Leases	5230	Other than an operating lease, an agency may also have a capital lease. A lease is considered a capital lease if it meets any of the following four criteria at its inception (the earlier of the date of the lease agreement or commitment): 1. Transfer of ownership: the lease transfers ownership (e.g., transfer of title) of the property to the transit agency by the end of the agreed-upon lease term. 2. Bargain purchase option: the lease contains a provision that allows the transit agency to purchase the leased property for a reduced price (reduced compared to expected fair value of the property at the date that the purchase option becomes exercisable). 3. Lease term: lease term is equal to or greater than 75% of the estimated useful life of the leased property. However, if the beginning of the lease term falls within the last 25% of the total estimated useful life of the leased property, this criterion cannot be used for classifying the lease as a capital lease. 4. Minimum lease payments: the present value at the beginning of the lease term of the minimum lease payments to be paid by the transit agency, excluding executory costs such as insurance, maintenance, and taxes, is equal to or greater than 90% of the fair value of the property at lease inception. The agency reports the current portion of capital leases in operating expenses for the reporting period. The current portion of capital leases includes lease payments made for capital leases during the reporting period. The noncurrent portion of capital leases is capitalized and reported as Capital Lease Obligations (2230).	High Occupancy Tolls	4270	HOV lanes allow vehicles with a certain minimum number of passengers (e.g., at least 2), as well as motorcycles and alternative fuel vehicles in some cases, to use lanes that are closed to other traffic. Some HOV lanes allow vehicles that would normally be prohibited to use the lane by paying a toll. Revenue from these tolls, when enacted by the authority of the transit agency, belongs to this object class.
Related Parties Lease Agreements	5240	Other than operating and capital leases, transit agencies may also have related parties lease agreements. Related parties leases are leases with terms and payment amounts that are substantially less than they would be in usual circumstances because the transit agency is related to the lessor. Common examples include: · A state government's department of transportation purchases buses and leases them to transit agencies in the state at half the market rate. · A county government leases land to a local transit agency for use as a parking lot for a dollar a year.	Other Dedicated Funds	4290	Revenues dedicated to transit other than taxes or tolls. These are often fees imposed on the public by the transit agency. Examples include the following: 1. Vehicle licensing and registration fees 2. Driver's license fees 3. Communications access fees and surcharges 4. Lottery and casino proceeds

Voluntary Non-Exchange Transactions	5250	This object class is for the provider to record the non-exchange expenses when all applicable eligibility requirements have been met. In a voluntary non-exchange transaction, an agency gives or receives value (e.g., revenue vehicle) without directly receiving or giving equal value (e.g., cash) in return. This is different from an exchange transaction, in which each party receives and gives up essentially equal values. Voluntary non-exchange transactions result from legislative or contractual agreements, other than exchanges, entered into willingly by the parties to the agreement. An example of a voluntary non-exchange transaction is when one transit agency builds capital assets, such as railways and train stations, and transfers the assets to another transit agency that operates them. Other examples of voluntary non-exchange transactions include certain grants and private donations. The provider in a non-exchange transaction recognizes a decrease in assets when all applicable eligibility requirements of the non-exchange transaction have been met. The provider reports resources transmitted before eligibility requirements are met as Assets (e.g., an advance). Receiving agencies can find guidance for reporting the non-exchange transaction under the Non-Added Revenue: Voluntary Non-Exchange Transaction (4630)	**Local Government Funds**	**4300**	These are funds received from municipal and county governments.
Depreciation	5260	Depreciation is the depletion of the cost of Capital Assets; it reflects the loss in value of capital assets over the years. In order to account for the reduction in value and usefulness of tangible property, the agency expenses a portion of the cost as depreciation each year of the asset's life. The agency reports the amount depreciated during the reporting period as an operating expense/reconciling item. Typically, as a non-cash expenditure, the agency reports depreciation as Funds Not Applied. Agencies choose their own depreciation method provided that the depreciation value is measured in a systematic and rational manner. Agencies also report the cost of writing off property damaged beyond repair that do not qualify as extraordinary and special items in this object class.	General Revenues of the Local Government	4310	There are essentially two common ways a local government can provide funds to a transit agency. 1. The government may appropriate a portion of its general budget to transit without a dedicated source of funding. In this case, the transit agency annually competes for funding with other entities such as schools and police forces. The agency reports this non-dedicated funding as General Revenues of the Local Government. 2. The government may also levy a tax or fee, the proceeds of which only go to transportation. This is a dedicated fund and the agency reports it under Local Funds Dedicated to Transit at Their Source.
Amortization of Intangibles	5270	Amortization is the systematic spreading of the value of Intangible Assets other than Goodwill over the asset's estimated useful life. Generally, agencies use the straight-line method to amortize intangible assets. The agency reports the amount amortized during the reporting period as an operating expense/reconciling item. Typically, the agency reports amortization as Funds Not Applied since it is not a cash expenditure.	Income Taxes	4321	Revenues earned by taxing the income of individuals and/or organizations subject to the taxing authority of the local government.
Extraordinary and Special Items	5280	Extraordinary items are material events or transactions that are distinguished by their unusual nature and by the infrequency of their occurrence. Examples of material extraordinary items include capital assets that were impaired by extraordinary events such as Hurricane Sandy or Hurricane Katrina. The agency reports these impaired values as extraordinary items rather than regular operating expenses to highlight their unusual and infrequent nature. If a material event or transaction is unusual in nature or occurs infrequently but not both, it does not meet criteria for classification as an extraordinary item; instead, the agency classifies it as a special item. Both extraordinary and special items are distinguishable from normal operating items and the agency thus reports them separately.	Sales Taxes	4322	Revenues earned by taxing sales of goods and/or services subject to the taxing authority of the local government.
Other Reconciling Items	5290	Other Reconciling Items are any other costs that cannot be captured in the above reconciling items object classes, such as funds to another agency through a cooperative agreement and expenses for purchased transportation services not meeting NTD requirements for a contractual agreement.	Property Taxes	4323	Revenues earned by taxing property subject to the taxing authority of the local government.
ADA Related Reconciling Items	5920	The Americans with Disabilities Act of 1990 (ADA) prohibits discrimination and ensures equal opportunity for persons with disabilities in employment, state and local government services, public accommodations, commercial facilities, and transportation. Agencies must report the total expenses that result from ADA requirements for complementary paratransit in demand response (DR) and demand response-taxi (DT) modes. In this object class, agencies report the portion of their reconciling item expenses that are attributable to ADA-required service. This object class is not exclusive of other reconciling item object classes. For example, if you spent $10,000 to lease vehicles, and $1,000 of this was to lease a vehicle used for ADA service, then you would report $10,000 under Operating Lease Expenses (5220) and $1,000 under ADA Related Reconciling Items (5920).	Fuel Taxes	4324	Revenues earned by taxing fuel subject to the taxing authority of the local government. This object class was previously known as gasoline taxes but includes all fuel taxes.
			Other Taxes	4325	Revenues earned by levying other taxes by the authority of the local government. Examples include cigarette/tobacco, payroll, excise, and vehicle rental taxes.
			Bridge, Tunnel, and Highway Tolls	4326	Tolls enacted by the authority of the local government on bridges, tunnels, highways, or other roadways, except High Occupancy Vehicle (HOV) toll revenues.
			High Occupancy Tolls	4327	HOV lanes allow vehicles with a certain minimum number of passengers (e.g., at least 2), as well as motorcycles and alternative fuel vehicles in some cases, to use lanes that are closed to other traffic. Some HOV lanes allow vehicles that would normally be prohibited to use the lane by paying a toll. Revenue from these tolls, when enacted by the authority of the local government, belongs to this object class.
			Other Dedicated Funds	4329	Revenues dedicated to transit other than taxes or tolls. These are often fees imposed on the public by the local government. Examples include the following: 1. Vehicle licensing and registration fees 2. Driver's license fees 3. Communications access fees and surcharges 4. Lottery and casino proceeds
			Extraordinary and Special Items	4330	Extraordinary and Special Items is defined in Directly Generated Funds. There are four object classes for Extraordinary and Special sources of funds. This one is for such funds that come from local sources. For example, agencies report county disaster relief funds in this object class.
			Other Local Funds	4390	These are funds from local government that cannot be considered either an allocation from the general revenues, or a dedicated fund. Other local funds typically include local grants or other miscellaneous local funds.
			State Government Funds	**4400**	These are funds received from state, commonwealth, or territory governments.
			General Revenues of the State Government	4410	There are essentially two common ways a state government can provide funds to a transit agency. 1. The government may allocate a portion of its general budget to transit without a dedicated source of funding. In this case, the transit agency annually competes for funding with other programs. The agency reports this non-dedicated funding as General Revenues of the State Government. 2. The agency reports dedicated sources of revenue under State Transportation Funds (4420).

State Transportation Fund	4420	Many states set up a State Transportation Fund that is separate from the General Fund. It usually has several dedicated sources of funding, often including funding sources such as fuel taxes, vehicle registration fees, or bonds backed by such sources. The Transportation Fund typically funds both transit agencies and other transportation needs such as the highway department. Agencies are not required to report the individual sources of funding that support the State Transportation Fund.
Extraordinary and Special Items	4430	Extraordinary and Special Items is defined in Directly Generated Funds. There are four object classes for Extraordinary and Special sources of funds. This one is for such funds that come from state sources. For example, agencies report state relief funds in this object class.
Federal Funds	**4500**	Federal funds generally fall into three categories: 1. Funds for operating assistance: Operating assistance funding is explicitly intended to be spent on operations, and in most cases requires 50% local match. 2. Funds for capital assistance: Capital assistance funding is required to be spent on capital, and in most cases requires 20% local match. 3. Funds for capital assistance spent on operations: In some cases, capital assistance may be spent on activities that are normally considered operating, such as preventive maintenance and Americans with Disabilities Act (ADA) service. This typically requires 20% local match. Although these funds are capital grants, the agency reports it as an operating expense because it spent the funds on operations. The local match portion of a grant is not part of the Federal Funds. It is part of Directly Generated Funds (4100), Directly Generated Dedicated Funds (4200), Local Government Funds (4300), or State Government Funds (4400). This includes in-kind matches such as land and services.
Non-Added Revenues	**4600**	Non-added revenues are funds received by the transit agency that are not included in the total funds earned during the operating period.
Contributed Services	4610	Contributed services are in-kind services received by the reporting agency from another entity or person where there is no payment for the services. Since there is no actual cost for the contributed service, the NTD includes the value of the service as non-added revenue. An example of a contributed service is when a retired lawyer provides pro-bono legal services to the local transit agency. On the other hand, when the transit agency is a part of a larger entity (like a department of city government) and the larger entity pays for the service, the reporter must report the cost of the service, as described in Full Cost of the Service.
Voluntary Non-Exchange Transactions	4620	This object class is for the receiver to record the non-exchange value when all applicable eligibility requirements have been met. In a voluntary non-exchange transaction, an agency gives or receives value (e.g., revenue vehicle) without directly receiving or giving equal value (e.g., cash) in return. This is different from an exchange transaction, in which each party receives and gives up essentially equal values. An example of a voluntary non-exchange transaction is when one government agency builds capital assets and transfers the assets to another transit agency that operates them. The recipient of a non-exchange transaction recognizes non-exchange receivables or funds when all applicable eligibility requirements have been met. Examples of eligibility requirements might include situations where the receiving agency is required to wait for a period of time before it has access to the transferred asset, or where the provider's transfer of asset is contingent upon an agreed upon action taken by the recipient. The agency records non-exchange receivables as current or noncurrent assets. The recipient reports resources transmitted before eligibility requirements are met as deferred revenues (liability). Providing agencies can find guidance for reporting the non-exchange transaction under the Reconciling Items: Voluntary Non-Exchange Transaction (5250).
Sales and Disposals of Assets	4630	Sales and disposals of assets include, but are not limited to sales of equipment, buildings, real estate and other property. Funds from sales and disposals of capital assets are not considered revenues earned because these transactions involve the conversion of existing assets into cash and not an increase in asset value. Consequently, NTD does not include this amount in the total funds earned during the reporting period. If an asset is sold for an amount higher than its book value (cost less accumulated depreciation), the agency records the difference between the sale price and book value as a gain in Other Agency Revenues (4150).
Transportation Development Credits	4640	In some states, funds spent on transportation at the state level can be used as a non-federal match for federal grants to transit agencies. These are known as Transportation Development Credits (TDCs) or toll credits. Since these credits are not actually used to cover expenses, NTD does not include these credits in the total funds earned.

Proposed Budget for Transportation Program

Statement of Need

Please provide a narrative interpretation of how the below budget reflects your agency's need. Explain the purpose of the grant request in terms of the need for funding availability (as opposed to project merits, which must be described in the Proposed Project Description). Please limit your response to 250 words.	Section 5311 funding for operating assistance is essential if service is to continue for the non-urbanized areas of the County. The budget is reflective of the funds necessary to operate routes in the rural area, the routes are a key component of economic development in the areas they serve.

Budget for Year of Anticipated Award

All applicants for all request types must complete this budget form. For each component, amounts reported should be based on projected values for the year of anticipated award for the current grant application.

Instructions: Amounts reflected in the Program Budget must be limited to those operating and administrative expenses/revenues supporting the applicant's transportation program. For agencies whose primary purpose is not transportation, the transportation program budget must be separated out from general administration and other agency functions. Shared costs such as facility rental and utilities must be allocated to the transportation program on a reasonable and specified basis.

Enable adding rows:  Disable adding rows: 

Current and Pending Section 5311 Awards					
Instructions:	List all current and pending Section 5311 contracts.				
Contract Number or Pending	**Execution Date or Not Applicable**	**Expiration Date or Not Applicable**	**Original Amount**	**Current Balance**	**Expected Closeout Date**
G2B95	2/24/2023	12/31/2025	$2,264,610	$1,638,437	12/31/2025
G2W60	4/16/2024	12/31/2025	$61,484	$61,484	12/31/2025
G2W59	4/17/2024	12/31/2025	$621,763	$621,263	12/31/2025
G2T56	1/24/2024	12/31/2025	$575,000	$574,500	12/31/2025

Operating & Administrative Expenses			
Instructions	**Object Class**	**Code**	**Amount**
Use drop-down to select Object Class	Services	5020	$ 5,634,000
Use drop-down to select Object Class	Fuel and Lubricants	5031	$ 1,053,300
Use drop-down to select Object Class	Miscellaneous Expenses	5090	$ 801,600
Use drop-down to select Object Class	Other Salaries and Wages	5013	$ 632,100

Use drop-down to select Object Class	Other Materials and Supplies	5039	$ 85,000
Use drop-down to select Object Class		-	$ -
Use drop-down to select Object Class		-	$ -
Use drop-down to select Object Class		-	$ -
Use drop-down to select Object Class		-	$ -
Use drop-down to select Object Class		-	$ -
Use drop-down to select Object Class		-	$ -
Use drop-down to select Object Class		-	$ -
			$ 8,206,000

Operating & Administrative Revenues			
Instructions	**Object Class**	**Code**	**Amount**
Use drop-down to select Object Class	Passenger Fares	4110	$ 1,150,000
Use drop-down to select Object Class	Local Government Funds	4300	$ 6,971,000
Use drop-down to select Object Class	Other Agency Revenues	4150	$ 85,000
Use drop-down to select Object Class		-	$ -
Use drop-down to select Object Class		-	$ -

Current System Description

Instructions: Current System Description Tab provides space for a short description of who the applicant is and what services they provide. The form is in a question and answer format with designated text boxes (the applicant's response to the question must not exceed the space provided or word counts where indicated). If the applicant is a CTC, relevant pages of a Transportation Disadvantaged Service Plan (TDSP) and Annual Operating Report (AOR) containing the above information may be provided within TransCIP.

Questions:	Response	Maximum Word Count	Word Count
Please provide a brief general overview of the organization type (i.e., government authority, private non-profit, etc.) including:	The Collier County Board of County Commissioners is the governing body for the Public Transportation System in Collier County. Operating under the oversight of the Collier County Division of Public Transit & Neighborhood Enhancement (PTNE) within the Collier County Transportation Management Services Department, Collier Area Transit (CAT) serves as the principal public transit provider for Collier County, catering to the areas of Naples, Marco Island, and Immokalee.	100	67
Program mission and goals:	To provide safe, accessible, reliable, convenient, and courteous mobility services to our customers. CAT aims to provide dependable, convenient, and affordable mobility services, ensuring the safety and efficiency of its workforce, residents, and visitors. We offer appealing and eco-friendly mobility alternatives to reduce carbon footprints and environmental effects. Building strategic partnerships that raise awareness and educate communities about mobility choices is integral to bolstering the viability of our services, fostering livability, and enriching economic and social well-being.	100	77
Please inform the Department of any major organizational or operational changes since the submittal of your last application, examples include: implementation of mobility on demand services or leadership changes.	Since the last submittal, there has been no substantial change to the agency operationaly nor leadership.	100	16
According to your Title VI Plan, what populations do you serve?	Based on 2020 ACS Estimates, approximately 14.6% of the population residing in the CAT service area speak a language other than English. The two major languages other than English are Spanish and Creole. As a large portion of the residents served are considered LEP persons, we have created services to accomodate the other languages commonly seen in Collier.	100	58

Service Characteristics

Instructions: The service characteristics sheet is used to determine and report the anticipated quantitative impacts of the proposed project on your agency's transportation program. A calculation column has been provided to calculate the necessary data for both the current transportation program and if awarded. Please include the source of the data, e.g., Trapeze, direct observation, driver logs, maintenance records, etc.

Service Characteristic	Value	Data Collection/ Calculation
Unlinked Passenger Trips (UPT) The number of boardings on public transportation vehicles during the fiscal year. Transit agencies must count passengers each time they board vehicles, no matter how many vehicles they use to travel from their origin to their destination. If a transit vehicle changes routes while passengers are onboard (interlining), transit agencies should not recount the passengers. Employees or contractors on transit agency business are not passengers. For demand response (DR) modes, transit agencies must include personal care attendants and companions in UPT counts as long as they are not employees of the transit agency. This includes attendants and companions that ride fare free.	175,927	Data collected using APCs on-board Fixed Route buses.
Unduplicated Passengers per Year Unique (non-repeat) passengers served within the reporting year	175,927	Data collected using APCs on-board Fixed Route buses.

Activity Line Item Codes

Operating Assistance

Description	ALI Code
Operating Assistance	30.09.01

Vehicles

Description	ALI Code
Bus - Replacement Over 30'	11.12.03
Bus - Expansion Over 30'	11.13.03
Bus - Replacement Under 30'	11.12.04
Bus - Expansion Under 30'	11.13.04
Vans - Replacement	11.12.15
Vans - Expansion	11.13.15
Sedan - Replacement	11.12.16
Sedan - Expansion	11.13.16

Equipment

Description	ALI Code
Bus Passenger Shelters Acquisition	11.32.10
Shop Equipment Acquisition	11.42.06
ADP Hardware Acquisition	11.42.07
ADP Software Acquisition	11.42.08
Surveillance/Security (Bus) Acquisition	11.42.09
Fare Collection (Mobile) Acquisition	11.42.10
Support Vehicles Acquisition	11.42.11
Miscellaneous Equipment Acquisition	11.42.20
Radios Acquisition	11.62.03
Radios Construction	11.63.03

Preventative Maintenance

Description	ALI Code
Preventative Maintenance	11.7A.00

Mobility Management

Description	ALI Code
Mobility Management	11.7L.00

Facilities

Description	ALI Code
Admin Building Engineering & Design	11.41.01
Admin Building Acquisition	11.42.01
Admin Building Construction	11.43.01
Admin Building Rehab/Renovation	11.44.01
Admin Building Lease	11.46.01
Maintenance Facility Engineering & Design	11.41.02
Maintenance Facility Acquisition	11.42.02
Maintenance Facility Construction	11.43.02
Maintenance Facility Rehab/Renovation	11.44.02
Maintenance Facility Lease	11.46.02
Admin/Maint Facility Engineering & Design	11.41.03
Admin/Maint Facility Acquisition	11.42.03
Admin/Maint Facility Construction	11.43.03
Admin/Maint Facility Rehab/Renovation	11.44.03
Admin/Maint Facility Lease	11.46.03
Storage Facility Engineering & Design	11.41.04
Storage Facility Acquisition	11.42.04
Storage Facility Construction	11.43.04
Storage Facility Rehab/Renovation	11.44.04
Storage Facility Lease	11.46.04
Yards & Shops Engineering & Design	11.41.05
Yards & Shops Acquisition	11.42.05
Yards & Shops Construction	11.43.05
Yards & Shops Rehab/Renovation	11.44.05
Yards & Shops Lease	11.46.05

Operating Award Request

Instructions: Applicants must submit a full request description as part of the application. Responses must be entered in a question/answer format where indicated. Where a field or word count is included, the length of the applicant's response must not exceed the space or word count provided. The project description should not repeat the Current System Description. Operating Award Requests should be entered in whole numbers only.

Operating Award Request			
Budget Category	**Total**	**Federal**	**Local**
Salaries		$0	$0
Fringe Benefits		$0	$0
Contractual Services	$1,444,000	$722,000	$722,000
Other Direct Costs		$0	$0
a.		$0	$0
b.		$0	$0
c.		$0	$0
d.		$0	$0
e.		$0	$0
f.		$0	$0
g.		$0	$0
h.		$0	$0
i.		$0	$0
j.		$0	$0
k.		$0	$0
l.		$0	$0
m.		$0	$0
n.		$0	$0
o.		$0	$0
p.		$0	$0
Indirect Costs		$0	$0
Total	**$1,444,000**	**$722,000**	**$722,000**
The above information should be transferred to Form 424.	The total should match 18g within Form 424.	The total should match 18a within Form 424.	The total should match 18d within Form 424.

Proof of Local Match – Operating Projects

Instructions:

The Section 5311 federal share of eligible operating expenses may not exceed 50%. Some combination of state, local, or private funding sources must be identified and committed to provide the required non-Federal share. The non-Federal share may be cash, or in kind. Funds may be local, private, state, or (up to one half) unrestricted Federal funds. Funds may not include any borrowed against the value of capital equipment funded in whole or in part by State and/or Federal sources.

The Section 5311 Program permits up to one half the required match to be derived from other unrestricted Federal funds. Federal funds are unrestricted when a Federal agency permits its funds to match Section 5311. Essentially all Federal Social Service Programs using transit services are unrestricted, such as Medicaid, employment training, vocational rehabilitation services and Temporary Assistance for Needy Families; other U.S. DOT Programs are not considered unrestricted Federal funds. Contract revenue from the provision of transportation services to social service agencies may also be used as local match. The costs associated with providing the contract revenue service must be included in the project budget if using contract revenue as match.

Non-cash, in-kind contributions such as donations of goods or services and volunteered services are eligible to be counted towards the local match only if the value of such is formally documented, supported and pre-approved by the District Office. Any funds committed as match to another Federal program may not be used to match Section 5311 funds.

Local match may be derived from any non-U.S. Department of Transportation (USDOT) Federal Program, state programs, local contributions or grants.

Applicants may not borrow funds to use as match nor may they place liens on Section 5311-funded vehicles or equipment.

	The authorized representative that signs the proof of local match must be the same representative authorized by the Governing Board's Resolution. Supporting documentation of match funds must be uploaded into TransCIP. Proof may include, but is not limited to: (1) Transportation Disadvantaged (TD) allocation, (2) Letter on official letterhead from the applicant's CEO attesting to match availability and commitment, (3) Written statements from county commissions, state agencies, city managers, mayors, town councils, organizations, accounting firms and financial institutions.

Required Match (50%)	**$722,000**	
Revenue Type *Use dropdown to select*	**Description**	**Amount**
Local Government	General Fund	$722,000
	Operating Match Total:	**$722,000**

Project Description
Instructions: Describe the project being requested within the application.
Funding is sought to sustain rural transit routes in Collier County, Florida, including Route 19 connecting Immokalee to urban areas, Route 121 offering express service to Marco Island, and Routes 22 and 23 providing local transit within Immokalee. These routes facilitate access to vital services and employment opportunities, aligning with federal objectives to support low-income individuals in non-urbanized regions.

Project-Related Improvements	
Instructions:	Describe how the grant funding will improve your agency's transportation service in one or more areas. Applicants may also consider conducting scenario planning, cost-benefit analysis, and/or fiscal impact analysis to illustrate how transportation service will be enhanced.
Consider the below questions when identifying project related improvements. Will the project allow your agency to: Provide more hours of service and/or more trips? Expand service to a larger geographic area? Reduce headways/increase frequency? Expand access to essential services	Grant funding will not extend the current service but the funding will allow the agency to maintain the existing service.

Service Characteristics			
Service Characteristic	**Before Project**	**If the grant is awarded**	**Data Collection/Calculation Method**
Unlinked Passenger Trips (UPT)	**175,927**	175,927	Data collected using APCs on-board Fixed Route buses.
Unduplicated Passengers per Year	**175,927**	175,927	Data collected using APCs on-board Fixed Route buses.

Instructions for TransCIP Attachments

Each form and certification provides FDOT with information it must have to make required assurances to the Federal government and to make project selections. It is important that each required form and certification be complete and correct. Applicants should be aware that there are criminal sanctions for furnishing false information in order to obtain federal grants (18 U.S.C. 1001, Crimes and Criminal Procedure – Statements or entries generally).

The complete application should be uploaded into the Department's grant management system (TransCIP). Electronic resolutions, applications, and acceptance of grant awards are acceptable. Incomplete, illegible, or unsigned applications may be rejected.

Questions regarding Section 5311 applications or the application process should be directed to the FDOT District Office in the applicant's service area, as shown in the Resources tab. All signature pages must be completed following the board resolution date. Some forms may not be required based on the type of application being submitted, please review the following details to understand form requirements. Each applicant will be responsible for attaching applicable forms to project application within TransCIP.

1 - Grant Proposal Excel Workbook - Each program application should contain the Grant Proposal provided within this Excel Workbook. This workbook has a built in validation process to ensure completion based on the projects submitted. Once complete Excel Workbook should be uploaded to TransCIP within the associated opportunity.

2 - Cover Letter - A sample cover letter is included in the grant application for reference. The cover letter must be completed on agency letterhead and signed by the agency representative authorized in the Governing Board's Resolution. This representative must be the same individual referenced throughout the application as "the authorized agency representative." This ensures one consistent point of contact for questions and follow-up regarding the application.

3 - Governing Board's Resolution - A sample resolution form is included in the grant application for reference. The resolution must be completed on agency letterhead and signed by the chairperson of the agency's board. A new signed resolution must be submitted for each grant application and reference each program that is being applied for in that year.

4 - Public Hearing Notice - An opportunity for a public hearing is required ONLY for public agencies requesting capital grants under Section 5311. An application for Section 5311 submitted by a public agency should contain a copy of the notice of public hearing and an affidavit of publication. A sample public notice is in the application. A public notice should contain all pertinent information relating to the project (such as number and types of vehicles as well as the estimated cost of the vehicles) and should be published at least one time in a newspaper of general circulation in the applicant's service area, no less than 15 or more than 30 days prior to the submission of an application. The notice should state that persons requesting a hearing must notify the applicant of the request, in writing, and send a copy of the request for a hearing to the FDOT District Office.

The deadline for hearing requests must be prior to the date applications are due at the District Office. If a hearing is requested:
1 - A hearing must be conducted;
2 - The FDOT District Office must be notified of the date, time, and location of the hearing; and
3 - A copy of the minutes of the hearing (to include a discussion of issues raised and resolution of issues) must be submitted to the FDOT District Office, before a Section 5311 award can be made.

5 - Local Clearinghouse Agency/RPC Cover Letter *(Required if proposed project is for facilities)* - If the grant application is for facilities, please include a copy of the cover letter submitted to the local clearinghouse agency or RPC.

6 - FDOT Certification and Assurances - To be completed and signed by the individual authorized by the governing board of the applicant agency and uploaded into TransCIP.

7 - Standard Lobby Certification - All grant awards issued to a recipient in the amount of $100,000 or more must include a standard lobbying certification signed by the authorized agency representative.

8 - FTA Section 5333 (b) Assurance - All applicants must include a signed FTA Section 5333 (B) Assurance form, available in the 5311 Grant Application. By signing the following assurance, the recipient of Section 5311 and/or 5311(f) assistance assures it will comply with the labor protection provisions of 49 U.S.C. 5333(b) by one of the following actions: (1) signing the Special Warranty for the Rural Area Program (see FTA Circular C9040.1G, Chapter VIII); (2) agreeing to alternative comparable arrangements approved by the (Department of Labor (DOL); or (3) obtaining a waiver from the DOL.)

9 - Leasing Certification - This certification must be completed by all applicants for capital assistance and signed by the authorized agency representative. This certification does not need to be completed if the applicant plans to lease the vehicle. It also must be completed to certify that the agency will NOT lease the vehicle if that is the case.

10 - Certification of Equivalent Service - The "Certification of Equivalent Service" must be completed for all non-accessible vehicles.

11 - Form 424: Application for Federal Assistance - ALL applicants must complete the Standard Application for Federal Assistance (OMB 4040-0004 Form 424) . The code assigned to the Section 5311 Program in the Catalog of Federal Domestic Assistance is 20.509. This code should be shown in Section 11 of the form followed by the title: "Formula Grants for Rural Areas, Section 5311." Further instructions for Form 424 can be found on the "Resources" tab with in this workbook.

12 - Federal Certifications and Assurances - The last page (Appendix A) of the annual Federal Register Notice that applies to Federal Certifications and Assurances provides applicants with a single signature page on which an applicant and its attorney must certify compliance with the requirements of the various FTA grants or cooperative agreements. The Federal Register Notice is revised annually and is usually available around January 1 of each year. Applicants may obtain a copy of the current year document through the internet at the FTA website. If unable to access the form, applicants may contact their FDOT District Office for assistance. The appropriate signed Federal certification/assurance form must be included in the application when it is submitted to the FDOT District Office.

If the FTA Certifications & Assurances are not available for the year of application, applicants may use theprevious year's form. When the current year form becomes available, applicants must submit an updated form. The signature page for Federal Certifications and Assurances (include the page listing the certification categories) must be signed by the individual authorized by the applicant's governing board to sign and submit applications, and its attorney.

All applicants must use the current year form and it must be the actual form from the FTA. This form cannot be an edited version of a prior year's forms or a recreation of the form. DO NOT copy Federal Certifications & Assurances onto agency letterhead for signature, it will be returned to you and delay processing your grant request.

13 - Title VI Plan *(Required if not previously submitted to District)* - If an applicant has not previously submitted their Title VI plan to the Department, a copy must be included with the application. A template for this attachment may be obtained from your District office and/or the FDOT State Management Plan. Existing grantees may submit their Title VI Plan's concurrence letter.

14 - Protection of the Environment *(Required if the proposed project is for facilities)* - Most transit projects funded under Section 5311 will be classified by FTA as categorical exclusions. Examples of categorical exclusions include purchase of transit vehicles, and purchase of office equipment. If the proposed project is for construction or acquisition of facilities or other buildings, further evaluation may be required before a determination can be made that the project is a categorical exclusion. A Categorical Exclusion (CE) is described in 40 CFR 1508.4 and 23 CFR 771, as a project which, based upon experience with similar actions, does not individually or cumulatively have a significant environmental effect, and is excluded from the requirement to prepare an Environmental Assessment (EA) or an Environmental Impact Statement (EIS). Therefore, a project that qualifies as a CE generally requires a lower level of documentation. These projects do not bring significant impacts to planned growth or land use for the area; do not require the relocation of significant numbers of people; do not have a significant impact on any natural, cultural, recreational, historic, or other resources; do not involve significant air, noise, or water quality impacts; do not have significant impacts on travel patterns; and do not otherwise individually or cumulatively have any significant environmental impacts.

Types of projects that have been determined by FTA to qualify as CEs, and normally do not require any further National Environmental Policy Act (NEPA) approvals by FTA, are listed in 23 CFR 771.118(c). Additional actions which meet the criteria for a CE but may be designated as CEs only after FTA approval are listed in 23 CFR 771.118 (d). In these cases, the applicant must submit documentation which demonstrates that the specific conditions or criteria for these CEs are satisfied and that significant environmental effects will not result.

To meet the requirements of a CE determination, a proposed project may not be impermissibly segmented from a larger project. This means that a project may be proposed to be implemented in phases or as part of a larger undertaking, but must still demonstrate independent utility, connect logical termini, and should not restrict consideration of alternatives. In order to meet a CE designation, a proposed project cannot have substantial controversy on environmental grounds, or significant impact to properties protected by Section 4(f) of the US DOT Act (public park and recreation lands, wildlife and waterfowl refuges, and historic sites) or Section 106 of the National Historic Preservation Act (cultural resources including historic and archaeological sites). The presence of features such as wetlands and floodplains within the project area would likely also require additional documentation. The applicant should contact the Florida Department of Transportation (FDOT) District Office for assistance with determining the level of documentation required. The FDOT will use a description of the proposed project, along with any maps or figures to assist with determining if a proposed project is likely to meet FTA criteria for a CE. See the "Resources" tab for a link to the FTA Region 4 Categorical Exclusion checklist.

15 - Organization Chart - Upload a full organizational chart for your organization into TransCIP as part of your application documents, this is required for all program applications regardless to type of project.

16 - Proof of Local Match - Supporting documentation of match funds must be uploaded into TransCIP. Proof may include, but is not limited to:
(1) Transportation Disadvantaged (TD) allocation,
(2) Letter on official letterhead from the applicant's CEO attesting to match availability and commitment,
(3) Written statements from county commissions, state agencies, city managers, mayors, town councils, organizations, accounting firms and financial institutions.

17 - Completed Sample Order Form - To identify vehicle type and estimated cost visit http://tripsflorida.org/. NOTE: All vehicle requests must be supported with a completed sample order form for estimating the vehicle cost. The order form can be obtained from http://www.tripsflorida.org/contracts.html
1. Select Desired Vehicle
2. Choose Vendor (use drop down arrow next to vendor name to see information)
3. Select Order Packet
4. Complete Exhibit A (Order Form)
The Florida Department of Management Services Contract can be found at Florida Department of Management DMS (https://www.dms.myflorida.com/)

18 - Triennial Review- Closeout/Concurrence Letter or CAP - Required if the agency's latest Triennial Review included a CAP. The CAP is required once a deficiency and /or area of concern is identified after FDOT completes a triennial review and inspection. For more information see FDOT's Triennial Review Process as part of the State Management Plan at https://www.fdot.gov/transit/currentpages/navigation/grantsadministration.shtm.

You may upload other relevant documents such as project timelines, scopes or RFPs into TransCIP in the "Additional Documents" folder associated with the application.

I have read and understood the contents of this tab.

Resources

What's on the Market

Visit the FDOT TRIPS website (https://tripsflorida.org/) for all active contracts. The Florida Department of Management Services Contract can be found at the Florida Department of Management DMS website (https://www.dms.myflorida.com)

Navigate to:
business_operations/state_purchasing/state_contracts_and_agreements/state_term_contract/motor_vehicles/pricing

FDOT Vehicle Useful Life Benchmarks 2006-2022

Vehicle Category (Source: FTA Useful Life of Transit Buses - 2007)			Light-Duty Van, Sedan or Bus		Light-Duty Van, Sedan or Bus		Light-Duty Van, Sedan or Bus		Light-Duty Van, Sedan or Bus		Light-Duty Mid-Size Bus		Light-Duty Mid-Size Bus		Light-Duty Mid-Size Bus		Medium-Duty Bus		Medium-Duty Bus		Medium-Duty Bus		Heavy-Duty Large Bus	
Vehicle Type (Source: NTD)	Equipment (non-revenue)		Automobile (AO)		Van (VN)		Van (VN)		Van (VN)		Cutaway (CU)		Cutaway (CU)		Cutaway (CU)		Bus (BU)		Cutaway (CU)		Bus (BU)		Bus (BU)	
	Formerly Type "G"		Formerly Type "F"		Formerly Type "F"		Formerly Type "E"		Formerly Type "E"		Formerly Type "D"		Formerly Type "D"		Formerly Type "D"		Formerly Type "C"		Formerly Type "C"		Formerly Type "B"		Formerly Type "A"	
Vehicle Description (Source: TRIPS/DMS Contracts)	Service Trucks		Sedans/Station Wagons		Vans/Commuter Van (Unmodified)		Mini Vans (Modified)		MiniBus (Modified)		Transit Bus - Standard Cutaway		Small Cutaway		Transit Bus - Small Cutaway (Low Floor)		Medium Duty Bus (Arboc)		Medium Duty Bus (Champion)		Medium Duty Bus (El Dorado)		Heavy Duty	
Year	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**
2022	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2021	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2020	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2019	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2018	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000					10	350,000	12	500,000
2017	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000					10	350,000	12	500,000
2016	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000					10	350,000	12	500,000
2015	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2014	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2013	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2012	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2011	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2010	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	7	200,000			7	250,000	10	350,000	12	500,000
2009	5	150,000	4	100,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000			7	250,000	10	350,000	12	500,000
2008	5	150,000	4	100,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000			7	250,000	10	350,000	12	500,000
2007	5	150,000	4	100,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000			7	250,000	10	350,000	12	500,000
2006	5	150,000	4	100,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000			7	250,000	10	350,000	12	500,000

Useful Life Requirements

ASSET	USEFUL LIFE	SOURCE
TROLLEYS		
Fixed guideway steel-wheeled	25 years	FTA Circular 5010.1D
Fixed guideway electric, rubber tires	15 years	FTA Circular 5010.1D
Simulated trolleys (rubber tires, internal combustion engine)	Refer to bus useful life	FTA Circular 5010.1D
Rail Vehicles	25 years, see circular	FTA Circular 5010.1D
FERRIES		
Passenger ferries	25 years	FTA Circular 5010.1D
Other ferries (w/o refurbishment)	30 years	FTA Circular 5010.1D
Other ferries (w/refurbishment)	60 years	FTA Circular 5010.1D
FACILITIES		
Buildings- concrete, steel and frame construction	40 years	FTA Circular 5010.1D
OTHER CAPITAL EQUIPMENT		
Fare boxes	10 years	Manufacturer /Industry Standards
Computer hardware	4 years	GAAP Guidelines/Industry Standards
Computer hardware- Domain controllers	4 years	Industry Standards
Mobile data computers (real-time dispatching)	7 years	Manufacturer
Computer software	4 years	GAAP Guidelines/Industry Standards
Computer software- HASTUS	4 years	Manufacturer
Computer software- ADP	4 years	Industry Standards
Scheduling/fleet management software	4 years	GAAP Guidelines/Industry Standards
Communications equipment, mobile radios, base stations	10 years	GAAP Guidelines/Industry Standards
Security/Surveillance equipment, cameras for vehicles	Same as useful life of vehicle	
Security/Surveillance equipment, cameras for buildings	10 years	Industry Standards
Shop equipment- Alignment machines, bus washing, tire changers	10 years	Manufacturer
Bus lift	20 years	Manufacturer

Wheelchair lift	Same as useful life of vehicle	
Bus shelters	15 years	Industry Standards
Bus shelter/stop benches	10 years	Manufacturer
Office furniture	10 years	Manufacturer
Carpeting	5 years	Manufacturer
Repeater tower	25 years	Manufacturer
Engine for bus/trolley	4 years	Industry Standards
Bus stop signage	10 years	Industry Standards
HVAC parts	5 years	Grantee experience
Asphalt parking lot	15 years	GASB
Thermal diesel particle filter	10 years	Manufacturer
Commercial roofing	15 years	Industry Standards

Local Clearinghouses / Regional Planning Councils (RPC)

Clearinghouse/RPC	Contact Information	Counties Covered
West Florida RPC 4081-A East Olive Rd. Pensacola, FL 32514	Austin Mount austin.mount@wfrpc.org (850) 332-7976 (800) 226-8914	Bay, Escambia, Holmes, Okaloosa, Santa Rosa, Walton, & Washington
Apalachee RPC 2507 Callaway Rd. Suite 200 Tallahassee, FL 32303	Chris Rietow crietow@thearpc.com (850) 488-6211	Calhoun, Franklin, Gadsden, Gulf, Jackson, Jefferson, Leon, Liberty, Wakulla
North Central Florida RPC 2009 NW 67th Place Gainesville, FL 32653-1603	Scott Koons skoons@ncfrpc.org (352) 955-2200 ext. 103	Alachua, Bradford, Columbia, Dixie, Gilchrist, Hamilton, Lafayette, Levy, Madison, Marion, Suwannee, Taylor, Union
Northeast Florida RPC 6850 Belfort Oaks Place Jacksonville, FL 32216	Eric Anderson eamderspm@nefrpc.org (904) 279-0880 ext. 178	Baker, Clay, Duval, Flagler, Nassau, Putnam, St. Johns
East Central Florida RPC 455 North Garland Avenue Fourth Floor Orlando, FL 32801	Brenda Defoe-Surprenant bdefoe-surprenant@ecfrpc.org (407) 245-0300 ext. 336	Brevard, Lake, Orange, Osceola, Seminole, Sumter, Volusia
Central Florida RPC Post Office Drawer 2089 Bartow, FL 33830	Marybeth Soderstrom msoderstrom@cfrpc.org (863) 534-7130 ext. 134	DeSoto, Hardee, Highlands, Okeechobee, Polk
Tampa Bay RPC 4000 Gateway Center Blvd. Suite 100 Pinellas Park, FL 33782-6141	John Meyer johnm@tbrpc.org (727) 570-5151 ext. 10	Citrus, Hernando, Hillsborough, Manatee, Pasco, Pinellas
Southwest Florida RPC 1926 Victoria Ave Fort Myers, FL 33901	Nicole Gwinnett ngwinnett@swfrpc.org (239) 338-2550 ext. 232	Charlotte, Collier, Glades, Hendry, Lee, Sarasota
Treasure Coast RPC 421 Southwest Camden Ave Stuart, FL 34994	Stephanie Heidt sheidt@tcrpc.org (772) 221-4060	Indian River, Martin, Palm Beach, St. Lucie
South Florida RPC 3440 Hollywood Blvd. Suite 140 Hollywood, FL 33021	Kathe Lerch klerch@sfrpc.com (954) 985-4416	Broward, Miami-Dade, Monroe

FDOT District Office Contacts

District 1		P.O. Box 1249 801 North Broadway Bartow, FL 33830-1249
Paul A. Simmons	(863) 519-2388 Paul.Simmons@dot.state.fl.us	District Modal Development Manager
Michelle Peronto	(863) 519-2551 Michelle.Peronto@dot.state.fl.us	Transit Programs Administrator
Dale Hanson	(863) 519-2321 Dale.Hanson@dot.state.fl.us	Transit Projects Coordinator (ATKINS) Counties: *Highlands, Hardee, Okeechobee, DeSoto, Polk*
Stacy Booth	(863) 519-2562 Stacy.Booth@dot.state.fl.us	Transit Projects Coordinator Counties: *Charlotte, Lee, Glades, Hendry*
Victoria Upthegrove	(863) 519-2484 Victoria.Upthegrove@dot.state.fl.us	Transit Projects Coordinator Counties: *Sarasota, Manatee, Collier*
Michele Forestt	(863) 519-2412 Michele.Forestt@dot.state.fl.us	Transit Support Consultant
District 2		2198 Edison Ave, MS 2806

District 2		Jacksonville, FL 32204
Doreen Joyner-Howard	(904) 360-5650 Doreen.Joyner-Howard@dot.state.fl.us	Modal Development Manager
Geanelly Reveron	(904) 360-5684 Geanelly.Reveron@dot.state.fl.us	Transit Manager
Janell Damato	(904) 360-5687 Janell.Damato@dot.state.fl.us	Rural/Urban Transportation Coordinator
Angela Gregory	(904) 360-5667 Angela.Gregory@dot.state.fl.us	Transportation Coordinator
District 3		P.O. Box 607 Chipley, FL 32428-9990
Scott Walters	(850) 330-1553 Scott.Walters@dot.state.fl.us	District Modal Development Manager
Debbie "Toni" Prough	(850) 330-1558 Debbie.Prough@dot.state.fl.us	Public Transit Program Specialist
District 4		3400 W Commercial Blvd. Ft. Lauderdale, FL 33309
Birgit Olkuch	(954) 777-4689 Birgit.Olkuch@dot.state.fl.us	District Modal Development Administrator
Lisa Maack	(954) 777-4683 Lisa.Maack@dot.state.fl.us	Passenger Operations Manager
Jayne Pietrowski	(954) 777-4661 Jayne.Pietrowski@dot.state.fl.us	Senior Transit Coordinator
Marie Dorismond	(954) 777-4605 Marie.Dorismond@dot.state.fl.us	Transit Coordinator
District 5		420 W. Landstreet Road Orlando, FL 32824
Brian M. Stanger, P.E.	(386) 943-5543 Brian.Stanger@dot.state.fl.us	District Modal Development Administrator
Libertad Acosta-Anderson, P.E.	(386) 279-5470 Libertad.Acosta-Anderson@dot.state.fl.us	Passenger Operations Manager
Jo Santiago-Mercer	(321) 319-8175 Jo.Santiago-Mercer@dot.state.fl.us	Transit Intermodal Supervisor
Carlos Colon	(321) 319-8173 Carlos.Colon@dot.state.fl.us	Transit Project Coordinator
Jamie Ledgerwood	(386) 943-5195 Jamie.Ledgerwood@dot.state.fl.us	Transit Project Coordinator
District 6		1000 N.W. 111 Avenue Miami, Florida 33172
Raymond Freeman	(305) 470-5255 Raymond.Freeman@dot.state.fl.us	Passenger Operations Manager
District 7		11201 N McKinley Dr. MS-7500 Tampa, FL 33612
Ming Gao	(813) 975-6923 Ming.Gao@dot.state.fl.us	District Modal Development Administrator
Chris Leffert	(813) 975-6403 Chris.Leffert@dot.state.fl.us	Transit Programs Administrator
Dave Newell	(813) 975-6195 Dave.Newell@dot.state.fl.us	Transit Coordinator

Form 424 Instructions

Item	Entry
1	Type of Submission should be "Application"
2	Type of Application should be "New"
3	"Not Applicable"
4	"Not Applicable"
5. A	"Not Applicable"
5 B	Federal Award Identifier (FTA Grant Number) is not needed at this time. This number will be assigned after submission of State POP.
6	State use only (if applicable)
7	State Application Identifier is "1001"
8.a, b, c, d, e, and f	Enter legal name of applicant, name of primary organizational unit (including division, if applicable), which will undertake the assistance activity, enter employer/taxpayer identification number (EIN/TIN) as assigned by Internal Revenue Service, enter the organization's UEI number (received from Dun and Bradstreet), enter the complete address of the applicant (including country), and name, telephone number, e-mail and fax of the person to contact on matters related to this application.
9	Type of Applicant 1: Select Applicant Type
10	Name of Federal Agency should be "Federal Transit Administration"
11	Catalog of Federal Domestic Assistance (CFDA) Number is: 20.509. CFDA Title should be: Formula Grants for Rural Areas, Section 5311
12	"Not Applicable"
13	"Not Applicable"

14	List the areas affected by project (cities, counties, states etc.). Can be submitted as a separate attachment.
15	Enter a brief descriptive title of the project. If appropriate (e.g., construction or real property projects), attach a map showing project location. For pre-applications, use a separate sheet to provide a summary description of this project.
16	List (a) the applicant's Congressional District and (b) any Congressional District(s) affected by the program or project. Find your district here: https://www.house.gov/representatives/find-your-representative
17	Enter the proposed start date and end date of the project (dates must be within the same 12-month period/calendar year).
18	Amount requested or to be contributed during the first funding/budget period by each contributor. Value of in-kind contributions should be included on appropriate lines as applicable. If the action will result in a dollar change to an existing award, indicate only the amount of the change. For decreases, enclose the amounts in parentheses. If both basic and supplemental amounts are included, show breakdown on an attached sheet. For multiple program funding, use totals and show breakdown using same categories as item
19	Check the applicable box
20	Check the applicable box. If "yes", provide explanation in attachment.
21	Must be signed by the governing board representative that was authorized to sign this particular application.

Resources and Links

Procurement Guidance for Transit Agencies (June 2024)
Section 5311 FTA Circular
State Management Plan
Congressional Districts
Department of Management Services (DMS)
Disclosure of Lobbying Activities
Federal Audit Clearinghouse
FTA Certifications & Assurances
My Florida Marketplace
Standard Form 424
Sunbiz
TransCIP – FDOT's Transit Grant Management System
TRIPS Florida
FTA NEPA Categorical Exclusion Checklist
- Sunbiz
TRIPS Florida

Florida Department of Transportation

Capital Assistance Application



49 U.S.C. Section 5339, CFDA 20.526

Bus and Bus Facilities Formula Capital Program for Rural Areas

STOP: Before beginning your application, make sure all agency profile information is up-to-date in TransCIP. The agency profile provides critical information. If the agency profile is incorrect, your application may be considered incomplete or ineligible for consideration.

Agency Name:	Collier County Board of County Commissioners	Use drop-down to select or type to enter
FDOT District:	One	Use drop-down to select

Revenue Vehicle Inventory Certification

Instructions:

Applicants must ensure that the inventory in TransCIP is updated and includes all revenue vehicles. Only required fields must be completed. However, we encourage agencies to enter as much information as is readily available.

Each District will determine the deadline for vehicle information data entry to align with the Federal Fiscal Year 2025 application process. All updates must be completed by the deadline identified by your District, which may be different from that of other application elements.

The name of the accountable personnel and date of last inventory update must be provided in the fields below.

Failure to update inventory information will have a negative impact on your application. This information is critical in determining need and replacement status. Additionally, lack of updated information may cause a service enhancement project to not receive funding.

Certification:	Omar DeLeon
Date:	10/30/2024

Transportation Program Operating and Administrative Expenses

Expenses: The Estimated Transportation Program Operating & Administrative Expenses table must include all expense associated with the applicant's transportation program. Expenses must be reported by type as provided in the Program Budget tab and the below definitions table:

1-digit Level:	Not applicable
2-digit Level:	**For example, 5010 Labor**
3-digit Level:	**For example, 5011 Operators Salaries and Wages**

Object Class	Code	Definition
Labor	**5010**	Labor expenses arise from the performance of work by employees. Labor expenses include pay and allowances owed to employees in exchange for the services provided to the transit agency. It also includes bonuses, shift differentials, overtime premiums, minimum guarantees, paid absences, and fringe benefits.
Operators' Salaries and Wages	5011	Operators' salaries and wages include the cost of labor, excluding paid absences and fringe benefits, for the transit agency's employees who are classified as revenue vehicle operators or crewmembers. These expenses include wages for performing activities related to vehicle operations such as: · Report time · Platform time · Turn-in time · Accident reporting time These expenses also cover wages paid to back-up (extra board drivers) such as stand-by time. In small transit systems, operators also may be scheduled to perform vehicle maintenance duties that are typically performed by vehicle maintenance employees. These duties may include servicing revenue vehicles (e.g., fueling, interior cleaning, and exterior washing) and limited inspection and maintenance of revenue vehicles. Operators sometimes are temporarily assigned duties other than driving their vehicles in revenue service such as: · training time either as a student or instructor · revenue vehicle movement control as dispatchers or road supervisors · movement of revenue vehicles among maintenance and operating facilities · maintenance of bus stops and shelters · general administration assignment such as customer service and marketing
Operators' Paid Absences	5012	This includes vacation leave, sick time, and other paid time off not contingent on a specific event outside the control of the transit agency for revenue vehicle operators or crewmembers.
Other Salaries and Wages	5013	This object class includes the cost of labor, excluding paid absences and fringe benefits, of employees of the transit agency who are not classified as revenue vehicle operators or crewmembers (e.g., maintenance workers, administrative staff, and transit managers).
Other Paid Absences	5014	This includes vacation leave, sick time, and other paid time off not contingent on a specific event outside the control of the transit agency for its employees that are not classified as revenue vehicle operators or crewmembers.
Fringe Benefits	5015	Fringe benefits are the expenses for employment benefits that an employee receives in addition to his or her base salaries and wages. Fringe benefits include payments associated with the employee's labor that do not arise from the performance of work, but still arise from the employment relationship. Fringe benefits can be divided into the following four categories: 1. Employment Taxes: federal, Medicare, and Social Security taxes. 2. Health and Welfare Expenses: medical and dental insurance plans (to include hospital, surgical, and pharmaceutical plans); short-term disability and life insurance plans; workers' compensation or Federal Employees Liability Act Contribution; and unemployment plans. 3. Retirement Costs/Pension Plans: pension plans, long-term disability plans, and other postemployment benefits (OPEB). 4. Other Fringe Benefits: uniform and work clothing; tool allowances; employee and family transit passes; reimbursements for moving and education; assistance for dependent care, childcare, and adoption; employee discounts; and other fringe benefits not described in the categories listed above. Other Postemployment Benefits (OPEB) In addition to pensions, some transit agencies provide other postemployment benefits (OPEB). OPEB includes postemployment healthcare and life insurance that are provided separately from a pension plan.
Services	**5020**	Services are the labor and other work provided by outside organizations for fees and related expenses. Outside organizations may be private companies or public entities. The agency reports work done by personnel within the reporting unit as salaries and wages and fringe benefits. For example, if the reporting unit is a city, then transit-related work done by city employees, even those outside the transit division, is reported as salaries and wages and fringe benefits, not services. Services provided by an outside organization are usually procured as a substitute for in-house employee labor, except in the case of independent audits, which could not be performed by employees. Agencies usually substitute services for in-house labor because the skills offered by the outside organization are needed for only a short period of time or internal staff does not have the requisite skills. This object class includes all costs that are part of the service agreement. For example, if in a contract for custodial service the custodial company provides the cleaning supplies, the cost of these supplies belongs to Services, not Other Materials and Supplies. The services object class does not include purchased transportation service. A contractor that provides vehicle operators is considered a purchased transportation provider, and any other labor or materials provided by that contractor, including fuel, parts, and maintenance, belong to the purchased transportation object class.
Materials and Supplies	**5030**	The expenses in the following three object classes include products obtained from outside suppliers or those manufactured internally. The cost of the material or supply includes freight-in, purchase discounts, cash discounts, sales taxes, and excise taxes (except on fuel and lubricants). Charges to this object class include both materials and supplies issued from inventory for use, and materials and supplies purchased for immediate use (i.e., items used without going through inventory).
Fuel and Lubricants	5031	This object class includes fuel used to propel revenue and non-revenue vehicles and lubricants such as motor oil, transmission fluid, and grease. Purchase and cash discounts are included in the cost of the fuel or lubricant. Sales or excise taxes are not included in the cost; they are reported separately under Taxes (5060). The agency reports fuel costs net of fuel taxes, even if the agency paid the taxes initially and was later reimbursed. Note that modes powered by electricity report propulsion power under Revenue Vehicle Operation Utilities.
Tires and Tubes	5032	This object class includes the cost of tires and tubes, whether they are rented, leased or purchased. Do not report rented and leased tires and tubes under Operating Lease Expenses (5220). Purchase discounts, cash discounts, sales taxes, and excise taxes are included in the cost of the tires and tubes.
Other Materials and Supplies	5039	The expenses in this object class include products obtained from outside suppliers or those manufactured internally that are not covered in the two preceding object classes. The cost of the material or supply includes shipping costs, purchase discounts, cash discounts, sales taxes, and excise taxes. Costs associated with this object class include materials and supplies issued from inventory or purchased for immediate use (i.e., items used without going through inventory).

Transportation Program Operating and Administrative Revenues

Revenues: The Estimated Transportation Program Operating & Administrative Revenues table must include all funding sources used to support projected expenses. Revenues should be reported by type as provided in the application and the below definitions table:

1-digit Level:	**For example, 4100 Directly Generated Fares**
2-digit Level:	**For example, 4110 Passenger Fares**
3-digit Level:	**For example, 4111 Passenger-Paid Fares**

Object Class	Code	Definition
Directly Generated Funds	**4100**	Directly Generated Funds are funds that a transit agency earns from non-governmental sources. These revenues are generated by the transit agency.
Passenger Fares	4110	This revenue object class includes revenues earned from carrying passengers. This object class applies equally to directly operated (DO) and purchased transportation (PT) services. Generally, fares are the amounts paid by the rider to use transit services, to include the base fare, zone premiums, express service premiums, extra cost transfers, and quantity purchase discounts applicable to the passenger's ride. Agencies report the full amount of PT fare revenues regardless of whether the buyer or seller retains the revenue. Agencies may collect passenger fares in any of the following ways: 1. Before service is provided (e.g., through the sale of media such as passes, tickets and tokens sold to passengers) 2. Directly at the point of service (e.g., fare box, turnstile) 3. After the service is provided (e.g., through weekly or monthly billing) In some circumstances, several agencies share a fare card program and will periodically divide funds among themselves so that each agency within the program receives the appropriate amount of fare revenue. In such cases, each agency reports its share of the revenues. Passenger fares include Passenger-Paid Fares (4111) and Organization-Paid Fares (4112). Passenger fares do not include subsidies (e.g., subsidies from private organizations or subsidies from other sectors of operations), which are provided to support the general provision of transit service. Passenger fares also do not include fare assistance from other entities, such as governments, to provide a reduced fare or free fare for a general class of users (e.g., senior citizens, students). The agency reports subsidies and fare assistance in the appropriate private, state, local, or Federal Government sources of funds.
Passenger-Paid Fares	4111	Passenger-paid fares reflect the amount of the fare that the passengers pay on their own behalf. Passenger-paid fares may include the following examples: 1. Full Adult Fares: revenues earned by transporting passengers for the full adult fare. 2. Senior Citizen Fares: revenues earned by transporting passengers who pay a special, reduced fare because they are older than a prescribed age limit. 3. Student Fares: revenues earned by transporting passengers who pay a special, reduced fare because they are enrolled in an educational institution. 4. Child Fares: revenues earned from carrying passengers who pay a special, reduced fare because they are younger than a prescribed age limit. 5. Fares for Individuals with Disabilities: revenues earned from carrying passengers who pay a special, reduced fare because they are persons with disabilities. 6. Ferryboat Services: revenues earned from walk-on pedestrians, bicyclists, and public transportation vehicles passenger fares. For vehicles, the agency reports passenger fares for each occupant of the vehicle, including the driver. However, vehicle and bicycle ferriage fees are not included in passenger-paid fares but are reported in Non-public Transportation Revenues (4130). 7. Vanpool Services: For publicly sponsored vanpool (VP) services, passenger fares have unique provisions. For VP services, passenger fares include all fees and costs paid by the passengers. These costs often include fuel costs, maintenance expenses, lease payments, tolls and other out-of-pocket costs. 8. Special Ride Fares: revenues earned from carrying passengers who pay a special, reduced fare for a reason other than those specified above. 9. Handling Fees: revenues earned from charges for processing payment and issuing fare cards (e.g., an agency charges an initial start-up fee when issuing new cards, or charges extra fees for using one-time paper cards).
Organization-Paid Fares	4112	Organization-paid fares are paid for by an organization rather than by the passenger. Organization-paid fares also include funds for rides given along special routes for which a beneficiary of the service may guarantee funds. Organization-paid fares may result from agreements between the reporter and an agency or organization that pays a set amount in return for unlimited and/or reduced fare transit service for the persons covered by the agreement. Examples of organization-paid fares may include the following: 1. State and Local Government: revenues earned by providing rides for employees of state and local government (e.g., fares for postal workers or police officers). 2. Reduced Fare Reimbursements: revenues earned by providing rides for its members or beneficiaries. A common example is a university paying a transit agency to permit students to ride free after showing their valid student identification cards. 3. Special Route Guarantees: amounts paid for by organizations other than governments (e.g., industrial firms, shopping centers, public and private universities) to guarantee a minimum amount of funds on a line operated and/or to provide or maintain services to a specific area, especially for the benefit of the paying organization. 4. Other Special Contract Transit Fares: revenues earned under contractual arrangements with non-government entities for transit fares other than those arrangements specified in the above categories. A common example is a senior center that pays part of the cost of a route serving the center.
Park-and-Ride Parking Revenue	4120	The agency earns park-and-ride parking revenue from parking fees paid by passengers who drive to park-and-ride facilities operated by the agency to use transit service. The agency reports revenues earned from the operation of parking lots that are not park-and-ride locations in Other Agency Revenues (4150).
Non-Public Transportation Revenues	4130	This object class includes revenue for providing transportation services to private groups or entities or for carrying freight. The most common examples are the following: 1. Charter Service Revenues: revenues earned from operating vehicles under charter service contracts. 2. Freight Tariffs: revenues earned from carrying freight on routes whose primary purpose is passenger operations. These are the revenues earned from carrying all types of freight on passenger routes. It includes fees for carrying vehicles and bicycles on ferries. See ferryboat services example in Passenger-Paid Fares (4111). 3. School Bus Service Revenues: revenues earned from operating vehicles under school bus contracts. It is the amount paid by schools for the operation of buses exclusively to carry children to and from school. 4. Sight-seeing Fares: revenues earned from operating vehicles in sight-seeing service.
Auxiliary Transportation Funds	4140	Auxiliary transportation funds are earned from activities related to the provision of transit service but are not payment for transit service. Auxiliary funds result from business-type activities in which an agency earns supplemental revenues. For example, a transit agency is not in the advertising or concessions business, but it is able to earn additional funds by providing or leasing out these additional services to the public. Auxiliary funds include the following: 1. Advertising revenues 2. Concessions 3. Other auxiliary transportation revenues
Advertising Revenues	4141	Advertising revenues include funds earned from displaying advertising materials on transit system vehicles and property and includes agency media.
Concessions	4142	Concessions are revenues earned from granting operating rights to businesses (e.g., newsstands, candy counters) on property and equipment maintained by the transit agency (e.g., stations, vehicles). This also includes revenues from vending machines available on property maintained by the transit agency for public use.
Other Auxiliary Transportation Revenues	4149	The agency earns other auxiliary transportation revenues from auxiliary operations other than those specified above. This might include, but is not limited to merchandising, photo identification (ID) fees, locker rentals, movie licensing fees, naming rights, and fines for fare evasion or illegal parking.
Other Agency Revenues	4150	This object class includes revenues earned from activities not associated with the provision of the transit agency's transit service. Other agency revenues do not include funds received from local, state, or federal governments. Examples of other agency revenues include: 1. Sales of Maintenance Services: revenues earned from sales or performing maintenance services on property not owned or used by the transit agency. 2. Sales of Fuel: revenues earned from sales of fuel. 3. Sales of Assets: revenue received in the sale of an asset that is in excess of the asset's book value. See Sales and Disposals of Assets (4630) for a detailed example. 4. Rental of Revenue Vehicles: revenues earned from leasing transit agency revenue vehicles to other operators. 5. Rental of Buildings and Other Property: revenues earned from leasing transit system buildings (other than station concessions) and property to other organizations. 6. Rental of Real Estate: revenues earned from leasing real estate owned by the transit agency to other organizations. This includes revenues from joint development projects. 7. Rental Car Fees: revenues earned from rental car services. 8. Investment Income: revenues earned from investing in marketable securities and dividends received from state insurance pools. Investment income does not include earnings on capital grant funds advanced by the grantor; such earnings are to be credited to the same account as the capital grant itself. 9. Interest Income: revenues earned by placing funds in an interest-bearing account. 10. Student Fees: revenues generated by an educational institution from student fees to operate its own transit service. Student fees are different from student fares, which are amounts paid by the students for transit service. 11. Parking Facilities Revenue: revenues earned from parking fees generated from parking facilities not normally used as park-and-ride locations. Revenues earned from operating park-and-ride facilities are reported in Park-and-Ride Parking Revenue (4120). 12. Donations: funds from donations and grants from private foundations. 13. Other Agency Revenues: revenues that might include, but are not limited to: warranty claims, funds from lawsuits, Freedom of Information Act (FOIA) requests, revenue from vending machines available exclusively for employee use, administrative fees charged to other organizations,

Utilities	**5040**	This object class includes expenses for electricity, gas, water, telephone, heating oil, fuel for backup generators, and internet.	Revenues Accrued through a Purchased Transportation	4160	This object class includes revenue accrued by the transit agency as a seller of transportation services through purchased transportation agreements. This includes the contract funds earned (payments and accruals) by a reporter under contract to another reporter or public agency. The purchased transportation agreement must meet the requirements for a true Contractual Relationship. Revenue accrued through an agreement that does not meet these requirements is reported as Organization-Paid Fares (4112), Other Agency Revenues (4150), Local Government Funds (4300), or State Government Funds (4400), as appropriate.
Casualty and Liability Costs	**5050**	Expenses related to loss protection and losses incurred by the transit agency. These expenses include: · Compensation of others for their losses due to acts for which the transit agency is liable. · The costs of protecting the transit agency from losses through conventional insurance and other risk financing programs (e.g., self-insurance and insurance pools). · Agency losses due to the liable actions of others that are covered by other corporate insurance. Note that refunds and paybacks received from state insurance pools are netted from Casualty and Liability Costs. Transit agencies often incur self-insurance costs. Note that premiums also include self-insurance costs. Casualty and Liability Costs include the following: 1. Premiums for Physical Damage Insurance: premiums applicable to the reporting period to insure the transit agency from loss through damage to its own property caused by collision, fire, theft, flood, earthquakes and other types of losses. 2. Premiums for Public Liability and Property Damage Insurance: premiums applicable to the reporting period to insure the transit agency against loss from liability for incidents by the transit agency which cause damage to the person or property of others. 3. Payouts for Insured Public Liability and Property Damage Settlements: payments (or accruals) of actual liability to others arising from culpable acts of the transit agency that are covered by public liability insurance. 4. Payouts for Uninsured Public Liability and Property Damage Settlements: payments (or accruals) of actual liability to others arising from culpable acts of the transit agency that are not covered by public liability insurance. 5. Provision for Uninsured Public Liability and Property Damage Settlements: periodic estimates of liability to others arising from culpable acts of the transit agency that relate to the current period that are not covered by public liability insurance. 6. Premiums for Other Corporate Insurance: premiums applicable to the reporting period to insure the transit agency from losses other than damage to its property or liability for its culpable acts (e.g., fidelity bonds, business records insurance). 7. Other Corporate Losses: charges for actual losses resulting from events covered by the other corporate insurance. The agency reports costs of employees engaged in insuring and processing claims for and against the reporting agency in Labor, as appropriate. The agency reports the costs of repairing damaged property in Labor and Other Material and Supplies (5039), as appropriate. The costs of writing off property damaged beyond repair are reported as Extraordinary or Special Items (5280), depending on the circumstances of the impairment	Subsidy from Other Sectors of Operations	4170	Occasionally, the transit operation is only one part of a larger transportation entity. Such transit agencies may receive subsidies from other sectors of operations within the larger transportation entity to help cover the cost of transit. For example, a transportation authority that is responsible for airports, ports, or bridges, as well as for public transit, may apply excess funds from airport operations to transit operations. Subsidies from other sectors of operations may include: · Subsidies from utility rates where the transit agency is a utility company · Subsidies from bridge and tunnel tolls owned and operated by the transit agency · Subsidies from other sources provided by the same entity that operates the transit service
Taxes	**5060**	Tax expenses are the charges and assessments levied against the transit agency by federal, state and local governments. Sales taxes, excise taxes, freight-in and other acquisition costs are not included in this object class. Instead, they are accounted for as part of the cost of the material or service purchased. Reimbursement of Taxes Paid Reimbursement, or refunds, of taxes paid include the receipt or accrual of state government payments to help cover the cost of taxes incurred by the transit agency. Reimbursement of taxes is netted from the associated expense on which the tax was originally levied. The agency does not report reimbursements of taxes as revenue. For example, some states reimburse transit agencies for taxes paid on fuel. Agencies net refunds of fuel taxes from fuel tax expense, rather than reporting them as revenue.	Extraordinary and Special Items	4180	Extraordinary items are events or transactions that are distinguished by their unusual nature and by the infrequency of their occurrence. 1. Unusual nature means that the underlying event or transaction has a high degree of abnormality and is clearly unrelated to, or only incidentally related to, the ordinary and typical activities of the transit agency. 2. Infrequency of occurrence means that the underlying event or transaction would not reasonably be expected to recur in the foreseeable future, taking into account the environment in which the transit agency operates. Special items are events or transactions that are either unusual in nature or infrequent, but not both. The agency determines an extraordinary event or transaction to be material if it is material in relation to the agency's income before extraordinary items, to the trend of annual earnings before extraordinary items, or is material by other appropriate criteria. Examples of material extraordinary items include recoveries received for damages from a natural disaster, such as a hurricane or earthquake. Assets impaired by and recoveries received from these events are considered extraordinary because they are abnormal in occurrence and are not reasonably expected to recur in the foreseeable future. Extraordinary and special items are distinguishable from normal operating items and are thus reported separately. The nature and financial effects of each event or transaction is disclosed on the face of the statement of activities or in the notes to the financial statements. There are four object classes for Extraordinary and Special sources of funds. This one is for such funds that are directly generated. For example, agencies report insurance recoveries for property damaged in a natural disaster in this object class.
Purchased Transportation Expenses	**5100**	Purchased Transportation (PT) expenses include the payments or accruals to sellers or providers of service, including fare revenues retained by the seller. It does not include the capital leasing portion of the contract. Purchased vanpool service has its own unique issues. Please refer to Vanpool for more detail.	Total Recoveries	4190	Total recoveries include proceeds recovered from insurance companies to indemnify the transit agency for insured acts that resulted in a liability for damage to transit personnel or property or damage to the person or property of others. Total recoveries include monies received for items or events that are not classified as Extraordinary or Special (4180). For example, the agency reports proceeds received from insurance companies for physical damage claims resulting from an accident as insurance recoveries. Total recoveries also include amounts recovered from others held liable to damage to the transit agency's property. For example, the agency reports proceeds received from third parties involved in an accident as insurance recoveries. The agency reports full proceeds received from the insurance company as insurance recoveries; the agency does not net monies from the related asset replacement cost.
Purchased Transportation in Report	5101	This object class includes the payments or accruals to sellers or providers of service, including fare revenues retained by the seller. The agency reports Purchased Transportation (PT) expenses in this object class when they report the associated service in their own NTD report. If the other party reports the service, the expenses belong to the object class Purchased Transportation Filing Separate Report (5102). Please refer to Reporting Contractor Expenses for more information.	**Directly Generated Dedicated Funds**	**4200**	This object class includes taxes and fees levied by a transit agency that is organized as an independent political entity with its own taxation authority. The revenues to the transit agency originating from local, state, or federal governments, which have been raised through the taxing authority of the grantor governmental unit, are considered Local Government Funds (4300), State Government Funds (4400), or Federal Funds (4500).
Purchased Transportation Filing Separate Report	5102	The agency reports Purchased Transportation (PT) expenses in this object class when the other party reports the associated service data (e.g., miles, ridership) in their own NTD report. The agency that reports the service data then reports Purchased Transportation (PT) expenses in the object class Purchased Transportation in Report (5101). Reporting Contractor Expenses The expenses in this object class must include the total amount paid by the buyer to the seller. The seller's actual expenses are often less than this amount, since the seller receives a profit included in the expenses paid by the buyer; the actual expenses will be greater than the amount paid if the seller suffers a loss. Since buying agencies are reporting, the expenses recorded are the buyer's expenses, and the buyer reports the total amount paid to the seller.	Income Taxes	4210	Revenues earned by taxing the income of individuals and/or organizations subject to the taxing authority of the transit agency.
Miscellaneous Expenses	**5090**	This object class includes expenses that cannot be attributed to any of the other expense object classes. Agencies must check to be sure an expense does not belong in a different object class before reporting it as miscellaneous. Some common miscellaneous expenses are listed below. 1. Dues and Subscriptions: Fees for membership in industry organizations and subscriptions to periodicals. 2. Travel and Meetings: Air, train or bus fares and allowances for transportation of traveling transit agency employees and related officials. In addition, this expense includes food and lodging, charges for participation in industry conferences, and other related business meeting expenses. 3. Bridge, Tunnel, and Highway Tolls: Payments made to authorities and other organizations for the use of bridges, tunnels, highways, and other facilities. 4. Entertainment Expense: Costs of social activities and other incidental costs relating to meals, beverages, lodgings, transportation, and gratuities. 5. Charitable Donations: Contributions to charitable organizations made by the transit agency. 6. Fines and Penalties: Costs of fines and penalties incurred by the transit agency. 7. Bad Debt Expense: Amounts owed to the transit agency that the agency has determined to be uncollectable	Sales Taxes	4220	Revenues earned by taxing sales of goods and/or services subject to the taxing authority of the transit agency.
ADA Expenses	**5910**	The Americans with Disabilities Act of 1990 (ADA) prohibits discrimination and ensures equal opportunity for persons with disabilities in employment, state and local government services, public accommodations, commercial facilities, and transportation. Agencies must report the total expenses that result from ADA requirements for complementary paratransit in demand response (DR) and demand response-taxi (DT) modes. In this object class, agencies report the portion of their operating expenses that is attributable to ADA-required service. This object class is not exclusive of other operating expense object classes. For example, if you spent $10,000 on vehicle fuel, and $1,000 of this was to fuel a vehicle used for ADA service, then you would report $10,000 under Fuel and Lubricants (5031) and $1,000 under ADA Expenses (5910).	Property Taxes	4230	Revenues earned by taxing property subject to the taxing authority of the transit agency.
Reconciling Items	**5200**	Reconciling items are expenses that are not included as capital expenses or as mode-specific operating expenses. If reconciling items represent cash expenditures such as operating lease expenses, the agency reports them as Funds Applied. The agency reports non-cash expenditures such as depreciation as Funds Not Applied.	Fuel Taxes	4240	Revenues earned by taxing fuel subject to the taxing authority of the transit authority. This object class was previously known as gasoline taxes but includes all fuel taxes.
Interest Expenses	5210	Interest expenses are charges for the use of capital borrowed by the transit agency. Interest expenses may accrue on both short-term debt and Long-Term Debt obligations. 1. Interest on Long-Term Debt Obligations: charges for the use of capital borrowed on a long-term basis (the liability for which is usually represented by bonds or loans) employed in the operation of the transit system. Interest charges pertaining to construction debt that are capitalized will not be reflected as interest expense. 2. Interest on Short-Term Debt Obligations: charges for the use of capital borrowed on a short-term basis employed in the operation of the transit agency.	Other Taxes	4250	Revenues earned by levying other taxes by the authority of the transit agency. Examples include cigarette/tobacco, payroll, excise, and vehicle rental taxes.
Operating Lease Expenses	5220	Operating lease expenses include payments for the use of Capital Assets not owned by the transit agency. Operating leases allow the transit agency to use assets, but do not allow them the rights of asset ownership (e.g., transfer of title). As such, operating leases are not capitalized as assets, but are recorded as operating expenses during the reporting period. Some operating leases include costs that the agency must separate out and report under Services (5020). If part of the lease cost covers a service, rather than just the cost of the use of the asset, the agency reports this under Services (5020) rather than operating lease expenses. This also applies to Capital Leases (5230) and Related Parties Lease Agreements (5240).	Bridge, Tunnel, and Highway Tolls	4260	Tolls enacted by the authority of the transit agency on bridges, tunnels, highways, or other roadways, except High Occupancy Vehicle (HOV) toll revenues.
Capital Leases	5230	Other than an operating lease, an agency may also have a capital lease. A lease is considered a capital lease if it meets any of the following four criteria at its inception (the earlier of the date of the lease agreement or commitment): 1. Transfer of ownership: the lease transfers ownership (e.g., transfer of title) of the property to the transit agency by the end of the agreed-upon lease term. 2. Bargain purchase option: the lease contains a provision that allows the transit agency to purchase the leased property for a reduced price (reduced compared to expected fair value of the property at the date that the purchase option becomes exercisable). 3. Lease term: lease term is equal to or greater than 75% of the estimated useful life of the leased property. However, if the beginning of the lease term falls within the last 25% of the total estimated useful life of the leased property, this criterion cannot be used for classifying the lease as a capital lease. 4. Minimum lease payments: the present value at the beginning of the lease term of the minimum lease payments to be paid by the transit agency, excluding executory costs such as insurance, maintenance, and taxes, is equal to or greater than 90% of the fair value of the property at lease inception. The agency reports the current portion of capital leases in operating expenses for the reporting period. The current portion of capital leases includes lease payments made for capital leases during the reporting period. The noncurrent portion of capital leases is capitalized and reported as Capital Lease Obligations (2230).	High Occupancy Tolls	4270	HOV lanes allow vehicles with a certain minimum number of passengers (e.g., at least 2), as well as motorcycles and alternative fuel vehicles in some cases, to use lanes that are closed to other traffic. Some HOV lanes allow vehicles that would normally be prohibited to use the lane by paying a toll. Revenue from these tolls, when enacted by the authority of the transit agency, belongs to this object class.

Related Parties Lease Agreements	5240	Other than operating and capital leases, transit agencies may also have related parties lease agreements. Related parties leases are leases with terms and payment amounts that are substantially less than they would be in usual circumstances because the transit agency is related to the lessor. Common examples include: · A state government's department of transportation purchases buses and leases them to transit agencies in the state at half the market rate. · A county government leases land to a local transit agency for use as a parking lot for a dollar a year.	Other Dedicated Funds	4290	Revenues dedicated to transit other than taxes or tolls. These are often fees imposed on the public by the transit agency. Examples include the following: 1. Vehicle licensing and registration fees 2. Driver's license fees 3. Communications access fees and surcharges 4. Lottery and casino proceeds
Voluntary Non-Exchange Transactions	5250	This object class is for the provider to record the non-exchange expenses when all applicable eligibility requirements have been met. In a voluntary non-exchange transaction, an agency gives or receives value (e.g., revenue vehicle) without directly receiving or giving equal value (e.g., cash) in return. This is different from an exchange transaction, in which each party receives and gives up essentially equal values. Voluntary non-exchange transactions result from legislative or contractual agreements, other than exchanges, entered into willingly by the parties to the agreement. An example of a voluntary non-exchange transaction is when one transit agency builds capital assets, such as railways and train stations, and transfers the assets to another transit agency that operates them. Other examples of voluntary non-exchange transactions include certain grants and private donations. The provider in a non-exchange transaction recognizes a decrease in assets when all applicable eligibility requirements of the non-exchange transaction have been met. The provider reports resources transmitted before eligibility requirements are met as Assets (e.g., an advance). Receiving agencies can find guidance for reporting the non-exchange transaction under the Non-Added Revenue: Voluntary Non-Exchange	**Local Government Funds**	**4300**	These are funds received from municipal and county governments.
Depreciation	5260	Depreciation is the depletion of the cost of Capital Assets; it reflects the loss in value of capital assets over the years. In order to account for the reduction in value and usefulness of tangible property, the agency expenses a portion of the cost as depreciation each year of the asset's life. The agency reports the amount depreciated during the reporting period as an operating expense/reconciling item. Typically, as a non-cash expenditure, the agency reports depreciation as Funds Not Applied. Agencies choose their own depreciation method provided that the depreciation value is measured in a systematic and rational manner. Agencies also report the cost of writing off property damaged beyond repair that do not qualify as extraordinary and special items in this object class.	General Revenues of the Local Government	4310	There are essentially two common ways a local government can provide funds to a transit agency. 1. The government may appropriate a portion of its general budget to transit without a dedicated source of funding. In this case, the transit agency annually competes for funding with other entities such as schools and police forces. The agency reports this non-dedicated funding as General Revenues of the Local Government. 2. The government may also levy a tax or fee, the proceeds of which only go to transportation. This is a dedicated fund and the agency reports it under Local Funds Dedicated to Transit at Their Source.
Amortization of Intangibles	5270	Amortization is the systematic spreading of the value of Intangible Assets other than Goodwill over the asset's estimated useful life. Generally, agencies use the straight-line method to amortize intangible assets. The agency reports the amount amortized during the reporting period as an operating expense/reconciling item. Typically, the agency reports amortization as Funds Not Applied since it is not a cash expenditure.	Income Taxes	4321	Revenues earned by taxing the income of individuals and/or organizations subject to the taxing authority of the local government.
Extraordinary and Special Items	5280	Extraordinary items are material events or transactions that are distinguished by their unusual nature and by the infrequency of their occurrence. Examples of material extraordinary items include capital assets that were impaired by extraordinary events such as Hurricane Sandy or Hurricane Katrina. The agency reports these impaired values as extraordinary items rather than regular operating expenses to highlight their unusual and infrequent nature. If a material event or transaction is unusual in nature or occurs infrequently but not both, it does not meet criteria for classification as an extraordinary item; instead, the agency classifies it as a special item. Both extraordinary and special items are distinguishable from normal operating items and the agency thus reports them separately.	Sales Taxes	4322	Revenues earned by taxing sales of goods and/or services subject to the taxing authority of the local government.
Other Reconciling Items	5290	Other Reconciling Items are any other costs that cannot be captured in the above reconciling items object classes, such as funds to another agency through a cooperative agreement and expenses for purchased transportation services not meeting NTD requirements for a contractual agreement.	Property Taxes	4323	Revenues earned by taxing property subject to the taxing authority of the local government.
ADA Related Reconciling Items	5920	The Americans with Disabilities Act of 1990 (ADA) prohibits discrimination and ensures equal opportunity for persons with disabilities in employment, state and local government services, public accommodations, commercial facilities, and transportation. Agencies must report the total expenses that result from ADA requirements for complementary paratransit in demand response (DR) and demand response-taxi (DT) modes. In this object class, agencies report the portion of their reconciling item expenses that are attributable to ADA-required service. This object class is not exclusive of other reconciling item object classes. For example, if you spent $10,000 to lease vehicles, and $1,000 of this was to lease a vehicle used for ADA service, then you would report $10,000 under Operating Lease Expenses (5220) and $1,000 under ADA Related Reconciling Items (5920).	Fuel Taxes	4324	Revenues earned by taxing fuel subject to the taxing authority of the local government. This object class was previously known as gasoline taxes but includes all fuel taxes.
			Other Taxes	4325	Revenues earned by levying other taxes by the authority of the local government. Examples include cigarette/tobacco, payroll, excise, and vehicle rental taxes.
			Bridge, Tunnel, and Highway Tolls	4326	Tolls enacted by the authority of the local government on bridges, tunnels, highways, or other roadways, except High Occupancy Vehicle (HOV) toll revenues.
			High Occupancy Tolls	4327	HOV lanes allow vehicles with a certain minimum number of passengers (e.g., at least 2), as well as motorcycles and alternative fuel vehicles in some cases, to use lanes that are closed to other traffic. Some HOV lanes allow vehicles that would normally be prohibited to use the lane by paying a toll. Revenue from these tolls, when enacted by the authority of the local government, belongs to this object class.
			Other Dedicated Funds	4329	Revenues dedicated to transit other than taxes or tolls. These are often fees imposed on the public by the local government. Examples include the following: 1. Vehicle licensing and registration fees 2. Driver's license fees 3. Communications access fees and surcharges 4. Lottery and casino proceeds
			Extraordinary and Special Items	4330	Extraordinary and Special Items is defined in Directly Generated Funds. There are four object classes for Extraordinary and Special sources of funds. This one is for such funds that come from local sources. For example, agencies report county disaster relief funds in this object class.
			Other Local Funds	4390	These are funds from local government that cannot be considered either an allocation from the general revenues, or a dedicated fund. Other local funds typically include local grants or other miscellaneous local funds.
			State Government Funds	**4400**	These are funds received from state, commonwealth, or territory governments.
			General Revenues of the State Government	4410	There are essentially two common ways a state government can provide funds to a transit agency. 1. The government may allocate a portion of its general budget to transit without a dedicated source of funding. In this case, the transit agency annually competes for funding with other programs. The agency reports this non-dedicated funding as General Revenues of the State Government. 2. The agency reports dedicated sources of revenue under State Transportation Funds (4420).
			State Transportation Fund	4420	Many states set up a State Transportation Fund that is separate from the General Fund. It usually has several dedicated sources of funding, often including funding sources such as fuel taxes, vehicle registration fees, or bonds backed by such sources. The Transportation Fund typically funds both transit agencies and other transportation needs such as the highway department. Agencies are not required to report the individual sources of funding that support the State Transportation Fund.
			Extraordinary and Special Items	4430	Extraordinary and Special Items is defined in Directly Generated Funds. There are four object classes for Extraordinary and Special sources of funds. This one is for such funds that come from state sources. For example, agencies report state relief funds in this object class.
			Federal Funds	**4500**	Federal funds generally fall into three categories: 1. Funds for operating assistance: Operating assistance funding is explicitly intended to be spent on operations, and in most cases requires 50% local match. 2. Funds for capital assistance: Capital assistance funding is required to be spent on capital, and in most cases requires 20% local match. 3. Funds for capital assistance spent on operations: In some cases, capital assistance may be spent on activities that are normally considered operating, such as preventive maintenance and Americans with Disabilities Act (ADA) service. This typically requires 20% local match. Although these funds are capital grants, the agency reports it as an operating expense because it spent the funds on operations. The local match portion of a grant is not part of the Federal Funds. It is part of Directly Generated Funds (4100), Directly Generated Dedicated Funds (4200), Local Government Funds (4300), or State Government Funds (4400). This includes in-kind matches such as land and services.
			Non-Added Revenues	**4600**	Non-added revenues are funds received by the transit agency that are not included in the total funds earned during the operating period.
			Contributed Services	4610	Contributed services are in-kind services received by the reporting agency from another entity or person where there is no payment for the services. Since there is no actual cost for the contributed service, the NTD includes the value of the service as non-added revenue. An example of a contributed service is when a retired lawyer provides pro-bono legal services to the local transit agency. On the other hand, when the transit agency is a part of a larger entity (like a department of city government) and the larger entity pays for the service, the reporter must report the cost of the service, as described in Full Cost of the Service.
			Voluntary Non-Exchange Transactions	4620	This object class is for the receiver to record the non-exchange value when all applicable eligibility requirements have been met. In a voluntary non-exchange transaction, an agency gives or receives value (e.g., revenue vehicle) without directly receiving or giving equal value (e.g., cash) in return. This is different from an exchange transaction, in which each party receives and gives up essentially equal values. An example of a voluntary non-exchange transaction is when one government agency builds capital assets and transfers the assets to another transit agency that operates them. The recipient of a non-exchange transaction recognizes non-exchange receivables or funds when all applicable eligibility requirements have been met. Examples of eligibility requirements might include situations where the receiving agency is required to wait for a period of time before it has access to the transferred asset, or where the provider's transfer of asset is contingent upon an agreed upon action taken by the recipient. The agency records non-exchange receivables as current or noncurrent assets. The recipient reports resources transmitted before eligibility requirements are met as deferred revenues (liability). Providing agencies can find guidance for reporting the non-exchange transaction under the Reconciling Items: Voluntary Non-Exchange Transaction (5250).
			Sales and Disposals of Assets	4630	Sales and disposals of assets include, but are not limited to sales of equipment, buildings, real estate and other property. Funds from sales and disposals of capital assets are not considered revenues earned because these transactions involve the conversion of existing assets into cash and not an increase in asset value. Consequently, NTD does not include this amount in the total funds earned during the reporting period. If an asset is sold for an amount higher than its book value (cost less accumulated depreciation), the agency records the difference between the sale price and book value as a gain in Other Agency Revenues (4150).
			Transportation Development Credits	4640	In some states, funds spent on transportation at the state level can be used as a non-federal match for federal grants to transit agencies. These are known as Transportation Development Credits (TDCs) or toll credits. Since these credits are not actually used to cover expenses, NTD does not include these credits in the total funds earned.

Proposed Budget for Transportation Program

Statement of Need

Please provide a narrative interpretation of how the below budget reflects your agency's need. Explain the purpose of the grant request in terms of the need for funding availability (as opposed to project merits, which must be described in the Proposed Project Description). A description of any budget shortfall may be included. Please limit your response to the space provided.	Collier Area Transit provides provides public transit services throughout Collier County, including regions like Naples, Marco Island, and Immokalee. The need is specific for the service provided in the rural portion of the county including Immokalee and Golden Gate Estates. The requested funding will be utilized for the purchase of a replacement bus and the associated equipment including a wireless router and . In doing so, Collier Area Transit will be addressing the goals set within the Transit Asset Management Plan to replace vehicles as they meet their useful life.

Budget for Year of Anticipated Award

All applicants for all request types must complete this budget form. For each component, amounts reported should be based on projected values for the year of anticipated award for the current grant application.

Instructions: Amounts reflected in the Program Budget must be limited to those operating and administrative expenses/revenues supporting the applicant's transportation program. For agencies whose primary purpose is not transportation, the transportation program budget must be separated out from general administration and other agency functions. Shared costs such as facility rental and utilities must be allocated to the transportation program on a reasonable and specified basis.

Enable adding rows: ⊕ Disable adding rows: ⊖

Operating & Administrative Expenses

Instructions	Object Class	Code	Amount
Use drop-down to select	Services	5020	$5,634,000
Use drop-down to select	Fuel and Lubricants	5031	$1,053,300
Use drop-down to select	Miscellaneous Expenses	5090	$801,600
Use drop-down to select	Other Salaries and Wages	5013	$632,100
Use drop-down to select	Other Materials and Supplies	5039	$85,000
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
			$8,206,000

Operating & Administrative Revenues			
Instructions	Object Class	Code	Amount
Use drop-down to select	Passenger Fares	4110	$1,150,000
Use drop-down to select	Local Government Funds	4300	$6,971,000
Use drop-down to select	Other Agency Revenues	4150	$85,000
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
Use drop-down to select		-	$0
			$8,206,000

Current System Description	
Instructions:	Current System Description Tab provides space for a short description of who the applicant is and what services they provide. The form is in a question and answer format with designated text boxes (the applicant's response to the question must not exceed the space provided or word counts where indicated). If the applicant is a CTC, relevant pages of a Transportation Disadvantaged Service Plan (TDSP) and Annual Operating Report (AOR) containing the above information may be provided within TransCIP.
Questions:	**Response**
Please provide a brief general overview of the organization type (i.e., government authority, private non-profit, etc.) including:	The Collier County Board of County Commissioners oversees the public transportation infrastructure in Collier County. The county's transit system, known as Collier Area Transit (CAT), functions under the guidance of the Collier County Division of Public Transit & Neighborhood Enhancement (PTNE), which is a part of the Collier County Transportation Management Services Department. CAT provides transit services throughout Collier County including urban and rural services. The service area includes regions like Naples, Marco Island, and Immokalee. The grant application is specific to the service in the rural portion of the county.
Program mission	It is the mission of CAT to provide safe, accessible and courteous public transportation services to our customers.
Program goals	Collier County aims to achieve several key objectives. These include operating dependable, user-friendly, and cost-efficient mobility services that effectively address the transportation requirements of our employees, residents, and guests while prioritizing safety and efficiency. We work towards this by bolstering the resilience of Collier County, safeguarding both our man-made and natural resources, offering appealing and convenient mobility alternatives that mitigate carbon emissions and environmental impacts in our communities. Additionally, we seek to foster significant partnerships that enhance awareness and education regarding mobility options and contribute to the vitality of mobility services, ultimately enhancing the livability and promoting economic and social well-being of our area.

Program objectives	Collier County's strategies for reaching its objectives include enhancing efficiency, service excellence, and the level of service to ensure a transit system that is well-structured. This emphasis is on affording job access to the workforce and ensuring mobility for those with limited access to private automobiles. The county also aims to establish an interconnected and optimized multimodal mobility network that accommodates a diverse array of needs and service market conditions. Additionally, Collier County is committed to implementing services and programs that reduce the total miles traveled by vehicles within the county. This will be achieved through coordinated efforts that integrate land use and transportation planning, incorporating transit needs into the development review and approval process.
Service, route, and trip types provided	The operating hours for these routes span from as early as 3:45 AM to as late as 8:20 PM. The service, which is part of the grant plan, aims to facilitate accessibility for individuals residing in the non-urbanized regions of Collier County. The grant funds will be allocated to sustain the operation of fixed routes, thereby granting access to essential services such as healthcare, shopping, education, employment, public services, and recreational opportunities for those living in non-urbanized areas. Since many of these vital services are unavailable in rural areas, a significant portion of the population is compelled to travel to urban areas in order to access them.
What are the sources of the transportation program's funding for operations (e.g., state, local, federal, private foundations, fares, other program fees?)?	Funding for these operations is derived from multiple sources, including the Federal Transit Administration's 5307, 5310, and 5311 programs, the Florida Department of Transportation, the Agency for Persons with Disabilities, the Florida Commission for the Transportation Disadvantaged, and various local funding programs. These funding sources are instrumental in supporting individuals with disabilities, low-income individuals, and the elderly across both urbanized and non-urbanized areas within the county.
To what extent does your agency serve minority populations? You may cite your agency's Title VI program to identify minority population groups served.	According to 2020 ACS Estimates, a large portion of Collier County's workforce lives in the rural area and the majority of activity centers which include major employers, health care, centers, and public services are within the urban area. All CAT routes serve a minority census block group, and about 50% of service miles are within a minority block. The recent TDP Major update included public surveys of the ridership with approximately 1,000 responses. The respondents had ethnic origins of 38% Hispanic/Latino and 25% Black/African American. All CAT routes serve a minority census block group, 48% of route miles are within minority block.

Briefly describe your agency's vehicle maintenance program. Which services are outsourced (e.g., oil changes)? Explain how vehicles are maintained without interruptions in service.	The maintenance of all vehicles is the responsibility of the specialized Collier County Fleet Management Division team assigned to Transit, situated at the CAT Operations Center on 8300 Radio Road. This team diligently maintains a preventative maintenance schedule for all CAT vehicles, ensuring that maintenance is performed without causing any disruptions to transportation services. The spares ratio is evaluated regularly for peak service to ensure no interuptions occur to the service.

Service Characteristics		
Instructions:	The service characteristics sheet is used to determine and report the anticipated quantitative impacts of the proposed project on your agency's transportation program. A calculation column has been provided to calculate the necessary data for both the current transportation program and if awarded. Please include the source of the data, e.g., Trapeze, direct observation, driver logs, maintenance records, etc.	
Service Characteristic	**Value**	**Data Collection/ Calculation Method**
Unlinked Passenger Trips (UPT) The number of boardings on public transportation vehicles during the fiscal year. Transit agencies must count passengers each time they board vehicles, no matter how many vehicles they use to travel from their origin to their destination. If a transit vehicle changes routes while passengers are onboard (interlining), transit agencies should not recount the passengers. Employees or contractors on transit agency business are not passengers. For demand response (DR) modes, transit agencies must include personal care attendants and companions in UPT counts as long as they are not employees of the transit agency. This includes attendants and companions that ride fare free	175,927	Electronic farebox and Mobile Fare Application
Unduplicated Passengers per Year Unique (non-repeat) passengers served within the reporting year	175,927	Electronic farebox and Mobile Fare Application

Activity Line Item Codes

Vehicles

Description	ALI Code
Bus - Replacement Over 30'	11.12.03
Bus - Expansion Over 30'	11.13.03
Bus - Replacement Under 30'	11.12.04
Bus - Expansion Under 30'	11.13.04
Vans - Replacement	11.12.15
Vans - Expansion	11.13.15
Sedan - Replacement	11.12.16
Sedan - Expansion	11.13.16

Equipment

Description	ALI Code
Bus Passenger Shelters Acquisition	11.32.10
Shop Equipment Acquisition	11.42.06
ADP Hardware Acquisition	11.42.07
ADP Software Acquisition	11.42.08
Surveillance/Security (Bus) Acquisition	11.42.09
Fare Collection (Mobile) Acquisition	11.42.10
Support Vehicles Acquisition	11.42.11
Miscellaneous Equipment Acquisition	11.42.20
Radios Acquisition	11.62.03
Radios Construction	11.63.03

Facilities

Description	ALI Code
Admin Building Engineering & Design	11.41.01
Admin Building Acquisition	11.42.01
Admin Building Construction	11.43.01
Admin Building Rehab/Renovation	11.44.01
Admin Building Lease	11.46.01
Maintenance Facility Engineering & Design	11.41.02
Maintenance Facility Acquisition	11.42.02
Maintenance Facility Construction	11.43.02
Maintenance Facility Rehab/Renovation	11.44.02
Maintenance Facility Lease	11.46.02
Admin/Maint Facility Engineering & Design	11.41.03
Admin/Maint Facility Acquisition	11.42.03
Admin/Maint Facility Construction	11.43.03
Admin/Maint Facility Rehab/Renovation	11.44.03
Admin/Maint Facility Lease	11.46.03
Storage Facility Engineering & Design	11.41.04
Storage Facility Acquisition	11.42.04
Storage Facility Construction	11.43.04
Storage Facility Rehab/Renovation	11.44.04
Storage Facility Lease	11.46.04
Yards & Shops Engineering & Design	11.41.05
Yards & Shops Acquisition	11.42.05
Yards & Shops Construction	11.43.05
Yards & Shops Rehab/Renovation	11.44.05
Yards & Shops Lease	11.46.05

Vehicle Request

Instructions:	Applicants must submit a full request description as part of the application. Responses must be entered in a question/answer format where indicated. Where a field or word count is included, the length of the applicant's response must not exceed the space or word count provided. The project description should not repeat the Current System Description.

Project Type	Examples
Expansion Vehicles	—Large heavy- duty transit buses 35'-40' —Small heavy-duty transit buses 30'
Replacement Vehicles	—Minibus —Standard Cutaway —Minivan

Project Description	
Instructions:	Describe the project being requested within this application.
One replacement 40-foot bus for fixed-route services is the subject of the grant proposal. A fixed route bus, which has met its useful life, will be replaced with the new bus. Collier County will meet its TAM Goal of keeping rolling stock in good repair by replacing the vehicles.	

Project-Related Improvements	
Instructions:	Describe how the grant funding will improve your agency's transportation service in one or more areas. If an area is not intended to be improved by the proposed project, indicate "Not Applicable". Applicants may also consider conducting scenario planning, cost-benefit analysis, and/or fiscal impact analysis to illustrate how transportation service will be enhanced.
Will the project allow your agency to: Provide more hours of service and/or more trips?	While grant funding won't increase hours worked, it will enable the continuation of the current service and improve reliability by enabling the purchase of a replacement bus.

Expand service to a larger geographic area within the same District?	The service area will remain the same, but the grant funding will be used to buy a replacement vehicle so, the current rural area service may continue to provide dependable service.
Reduce headways/increase frequency?	Funding from grants won't cause headways to decrease or frequency to rise.

Support a capital investment strategy in alignment with a Strategic Plan, Capital Improvement Plan, or Transit Asset Management Plan? *Example:* The vehicle replacements in this application were identified using the prioritization tool in agency's most recent TAM Plan, in order for the agency's fleet to meet its State of Good Repair targets.	The financing will guarantee that buses are replaced when the life expectancy is reached, supporting Collier County's TAM plan.
Address projected vulnerabilities?	With useful life mileage overages of fleet still in use, the Grant funding will guarantee that vehicles are replaced as soon as possible, preventing service interruptions.
Expand access to essential services?	Although the program won't be expanded, it will keep low-income and rural residents connected to the important services they need. To ensure continuing access to vital services, maintaining a vehicle replacement plan is a crucial component.
Enhance passenger experience (e.g., added amenities)?	By offering a dependable service with a new replacement vehicle that will enable CAT to decrease breakdowns by retiring a vehicle that has reached the end of its useful life, the passenger experience will be improved.

Decreases transportation costs, improve access to mobility options, and spur economic activity in underserved/disadvantaged communities?	As a vehicle that has reached the end of its useful life is retired upon receiving a new vehicle, a decrease in cost will be reflected in vehicle maintenance.
Overcome any opertations and administrative challenges or difficulties your agency is experiencing?	The funds will help satisfy the need for keeping capital assets in a satisfactory condition of repair. The cost of maintenance and part replacement rise dramatically as vehicles become older and wear out, placing a significant load on the operating budget. By easing part of that load, these capital grant funds will enable the transit organization to devote more resources to the actual providing of the service.
If a grant award will be used to maintain services, specifically explain how it will be used in the context of total service. In the case that a grant award is granted to maintain services as opposed to expand them, it is important to explain how the award would still improve the overall operations and provision of transportation services. Make sure to include information on how the agency will maintain adequate financial, maintenance, and operating records and comply with FTA reporting requirements including information for the Annual Program of Projects Status Reports, Milestone Activity Reports, NTD reporting, DBE reports etc.	The grant proposal is not for operational costs, The software Faster system will be used to handle documentation and tracking of the replacement vehicle for maintenance records to guarantee maintenance plan is being followed.
If this grant is not fully funded, can you still proceed with your transportation program? If applicable, consider providing an explanation of the scalability of the project?	The transit program will indeed keep running. Nonetheless, since vehicles that need to be retired will continue to be in use for commercial purposes, the ongoing usage of older vehicles will lower system dependability and raise maintenance costs.

Project Readiness	
Instructions:	If the proposed project is for vehicles, equipment, or other capital items, please provide a detailed description of project activities:

If applicable, please provide any pertinent information used to make a determination on the reasonableness of cost, i.e., independent cost estimates, quotes, etc.	The bus will be purchased using a contract; prices will be set for the contract base year and will be adjusted annually based on the Producer Price Index (PPI).
Please provide a full, detailed timeline of the project. The schedule should contain sufficient detail that identifies all steps or phases needed to implement the work proposed, and whether the proposed timeline is achievable. Moreover, the project schedule should identify all major project milestones. Examples of such milestones include approval of purchase orders, specifications, and estimates; procurement goals; delivery; installation; and invoicing FDOT for reimbursement.	Replacement bus: After being notified of the award, the rolling stock contract will be submitted to FDOT for approval. Purchase Order Approval- 1 month 14 months Delivery of Rolling Stock from the time of PO 1 month for post-delivery Buy America Review 3 months post delivery to Submit Invoice to FDOT for reimbursement
If you are requesting a vehicle that requires a driver with a CDL, how will you ensure that your driver(s) maintain CDL certification	Dispatchers monitor vehicle assignments. A CDL license is necessary for all Fixed Route operators, and it is reviewed every month to make sure renewals are done on time.
If the requested vehicles or equipment will be used by a lessee or private operator under contract to the applicant agency, how will oversight be undertaken of the proposed lessee/operator? Has an equitable plan for distribution of vehicles/equipment to lessees and/or private operators been completed?	The vehicle will be operated by a single private operator, and maintenance is handled by Collier County employees (Fleet Management Division). To make sure the vehicles are being utilized for the correct purpose, the Operator is routinely observed.

Describe any local support and coordination or public outreach that has already occurred. Applicants should consider including a lists of all project parties involved in delivering the project and describe details on efforts to collaborate among stakeholders. In addition, applicants can elaborate on the transit supportive plan that cites the proposed project. For example, is the project referenced in a Transit Development Plan (TDP), Transportation Disadvantaged Service Plan (TDSP), a Comprehensive Plan, or a Congestion Management Plan.	The Transit Development Plan, which underwent a thorough public engagement process, includes references to the projects. Additionally mentioned in Collier's Transit Asset Management Plan is the project. This project will not be delivered in collaboration with any other project parties.

Vehicle and Equipment Request

Instructions:

All vehicle requests must be supported with a completed sample order form in order to generate a more accurate estimation of the vehicle cost. If using the TRIPS Contract, the order form can be obtained from http://www.tripsflorida.org/contracts.html:

1. Select Desired Vehicle (Cutaway, Minibus etc.)
2. Choose Vendor (use drop down arrow next to vendor name to see information)
3. Select Order Packet
4. Complete Order Form

If not using the TRIPS, a quote should be uploaded from the desired vendor. This supporting documentation should be uploaded in TransCIP. Once uploaded in TransCIP, applicants should check the box to indicate the forms have been uploaded.

⊕ Enable adding rows ⊖ Disable adding rows

Vehicle Request

Instructions:

Under Description, select the project type from the drop down box. Under Detail, which is required to complete, include lift or ramp and vehicle make. For example, 2023 Ford Transit with ramp. For Useful Life information, see reference table in Resources tab. In the Fuel Type, enter the main energy source for the vehicle (gasoline, diesel, electric, etc.) Please note, when filling out Passenger Seats and Wheelchair Positions, if both wheelchair positions are occupied the ambulatory seats will be reduced to eight (8). Any bus options that are part of purchasing the bus itself should be part of the vehicle request and NOT separated out under equipment. Cost estimates should be supported by order forms or quotes.

Requests should be listed in order of priority. Unit costs must be listed in whole numbers only. If more space is needed to accommodate your request, add more rows to the table by first clicking "Enable adding rows" above.

Instructions	Description	Detail	ALI	Fuel Type	Useful Life (Years)	Passenger Seats	Wheelchair Positions	Quantity	Unit Cost	Total Cost	Federal Share	State (TRC) Share
Use drop-down to select request description	Bus - Replacement Over 30'	Bus - Replacement Over 30'	11.12.03	Diesel	12	38	2	1	$681,663	$681,663	$681,663	$170,416
Use drop-down to select request description										$0	$0	$0
Use drop-down to select request description										$0	$0	$0
Use drop-down to select request description										$0	$0	$0
Use drop-down to select request description										$0	$0	$0
Use drop-down to select request description										$0	$0	$0
Use drop-down to select request description										$0	$0	$0
Use drop-down to select request description										$0	$0	$0
Use drop-down to select request description										$0	$0	$0
Use drop-down to select request description										$0	$0	$0
Total			-	-	-	38	2	1	-	$681,663	$681,663	$170,416

Vehicles to be Replaced											
Instructions:	Vehicles listed for replacement must be included in TransCIP 2.0 Inventory. If more space is needed to accommodate your list, add more rows to the table. List vehicles in order of priority for replacement.										
FDOT Control #	**VIN**	**Make**	**Type**	**Model**	**Year**	**Fuel Type**	**Ramp or Lift**	**Passenger Seats**	**Wheelchair Positions**	**Status**	**Mileage**
N/A	15GGB2710C1180509	Gillig	BU-Bus	G27B102N4	2011	Diesel	Ramp	32	2	Active	596939
Total/Average								**32**	**2**		**596,939**

Service Characteristics			
Service Characteristic	**Before Project**	**If the grant is awarded**	**Data Collection/Calculation Method**
Unlinked Passenger Trips (UPT)	**175,927**	175,927	Electronic Fareboxes and Mobile Ticketing System
Unduplicated Passengers per Year	**175,927**	175,927	Electronic Fareboxes and Mobile Ticketing System

Equipment Request

Instructions:	Applicants must submit a full request description as part of the application. Responses must be entered in a question/answer format where indicated. Where a field or word count is included, the length of the applicant's response must not exceed the space or word count provided. The project description should not repeat the Current System Description.

Project Type	Examples
Equipment	—Fare boxes —Communications equipment —Security/surveillance equipment for vehicles and/or buildings —Shop equipment (alignment machines, bus washing machines, tire changers, etc.) —Bus shelters —Bus stop signage —Wheelchair lifts —Other miscellaneous equipment

Project Description	
Instructions:	Describe the project being requested within this application.
Purchase of needed electronic equipment including wireless routers and electronic inspection systems for the new replacement vehicle. As well as the funding to construct (4) Bus Stop improvements including the amenities.	
Instructions:	Describe how the grant funding will improve your agency's transportation service in one or more areas. If an area is not intended to be improved by the proposed project, indicate "Not Applicable". Applicants may also consider conducting scenario planning, cost-benefit analysis, and/or fiscal impact analysis to illustrate how transportation service will be enhanced.
Provide more hours of service and/or more trips?	Grant funding will not provide more hours but will allow for the sustainment of the current service and increase reliability and safety with the purchase of a wireless router and electronic inspection system for the replacement vehicles.

Expand service to a larger geographic area within the District?	The Funding will not expand service.
Reduce headways/increase frequency?	Grant funding will not reduce headways/nor increase frequency.

Support a capital investment strategy in alignment with a Strategic Plan, Capital Improvement Plan, or Transit Asset Management Plan? *Example:* The equipment replacements in this application were identified using the prioritization tool in agency's most recent TAM Plan, in order for the agency's assets to meet State of Good Repair targets.	The equipment is part of the vehicle replacement, which has been identified within the TAM Plan. Additionally the completion of the bus stop improvements aligns with the goal of CAT's Transit Development Plan.
Address projected vulnerabilities?	Grant funding will be used to purchase a wireless router and electronic inspection system that have reached the end of their useful life. Replacing this equipment will address vulnerabilities related to the maintenance of vehicle reliability and safety.
Expand access to essential services?	No the access will not be expanded.
Enhance passenger experience (e.g., added amenities)?	Yes, passengers will experience heighten reliability by the utilization of technology to maintain operations on time. Additionally, these funds will be used to construct bus stop improvements to add amenities to enhance safe access to the stops for passengers.
Decreases transportation costs, improve access to mobility options, and spur economic activity in underserved/disadvantaged communities?	Reduction of cost to transportation is captured by the technology that maximizes operational efficiency. The bus stop improvements will improve access for ADA accessibility for our bus stops and increase the level of service for the area identified.

Overcome any challenges or difficulties your agency is experiencing?	The funding will assist in meeting the demand for maintaining capital assets in a state of good repair. The construction of bus stop improvements will allow us to be a step closer to improving ADA accessibility for bus stops and increasing level of service for passengers.
If a grant award will be used to maintain services, specifically explain how it will be used in the context of total service. In the case that a grant award is granted to maintain services as opposed to expand them, it is important to explain how the award would still improve the overall operations and provision of transportation services. Make sure to include information on how the agency will maintain adequate financial, maintenance, and operating records and comply with FTA reporting requirements including information for the Annual Program of Projects Status Reports, Milestone Activity Reports, NTD reporting, DBE reports etc.?	The funding will be utilized to ensure that the bus service continues to operate at its current level. This will be achieved by using technology to track the buses and keep them on schedule.
If this grant is not fully funded, can you still proceed with your transportation program? If applicable, consider providing an explanation of the scalability of the project?	Yes, the transportation program will continue to operate.

Project Readiness	
Instructions: If the proposed project is for vehicles, equipment, or other capital items, please provide a detailed description of project activities:	
If applicable, please provide any pertinent information used to make a determination on the reasonableness of cost, i.e., independent cost estimates, quotes, etc.	Estimates have been obtained from listed prices online and quote from vendor.

Please provide a full, detailed timeline of the project. The schedule should contain sufficient detail that identifies all steps or phases needed to implement the work proposed, and whether the proposed timeline is achievable. Moreover, the project schedule should identify all major project milestones. Examples of such milestones include approval of purchase orders, specifications, and estimates; procurement goals; delivery; installation; and invoicing FDOT for reimbursement.	Grant award and acceptance process about 2 to 3 months PO Request about a month equipment delivery about 9 months Post Deliver 3 months for final invoice Bus Stop Improvements (4): Upon receiving notice of award. Procure construction - 2months Construction - 6 Months
If the requested equipment will be used by a lessee or private operator under contract to the applicant agency, how will oversight be undertaken of the proposed lessee/operator? Has an equitable plan for distribution of equipment to lessees and/or private operators been completed?	Collier County has a contract with MV Transportation Inc. who has drivers dedicated to the paratransit service. The vehicles will not be leased, they will be operated by Collier County's contracted vendor for the fixed route operations. Collier County staff (Fleet Management Division) is responsible for vehicle maintenance. The vehicle operators are regularly monitored to ensure that the technology on the bus are being used for their intended purpose.
Describe any local support and coordination or public outreach that has already occurred. Applicants should consider including a lists of all project parties involved in delivering the project and describe details on efforts to collaborate among stakeholders. In addition, applicants can elaborate on the transit supportive plan that cites the proposed project. For example, is the project referenced in a Transit Development Plan (TDP), Transportation Disadvantaged Service Plan (TDSP), a Comprehensive Plan, or a Congestion Management Plan.	The projects are referenced in the Transit Development Plan which went through an elaborate public outreach process. There will be no other project parties involved in the delivery of this project.

Equipment Request	
Instructions:	All equipment requests must be supported with a completed sample order form or Independent Cost Estimate in order to generate a more accurate estimation of the equipment cost. If using the TRIPS Contract, the order form can be obtained from http://www.tripsflorida.org/contracts.html: 1. Select Desired equipment 2. Choose Vendor (use drop down arrow next to vendor name to see information) 3. Select Order Packet 4. Complete Order Form If not using the TRIPS, a quote should be uploaded from the desired vendor. This supporting documentation should be uploaded in TransCIP. Once uploaded in TransCIP, applicants should check the box to indicate the forms have been uploaded. ⊕ Enable adding rows ⊖ Disable adding rows

Equipment Request	
Instructions:	List the number of items under Quantity and select a Description from the drop down box that best describes your project. Under Detail, provide father details, which is required to complete (i.e. two-way radio or stereo radio, computer hardware/software, etc.). If more space is needed to accommodate your request, add more rows to the table. The Department strongly encourages agencies seek quotes and/or independent cost estimates for equipment during the application development process to ensure full project cost is accounted for in the request. Unit costs must be listed in whole numbers only. Detail should be provided at the item level: for example, if multiple types of equipment are being requested there may be multiple lines in the table with the same ALI code, but with different details (e.g., office furniture, tablets, other technology hardware), useful life, quantities, and unit costs. Quotes or independent cost estimates must be provided for each type of item.

Instructions	Description	ALI	Detail	Useful Life (Years)	Quantity	Unit Cost	Total Cost	Federal Share	State (TRC) Share
Use drop-down to select request description	Miscellaneous Equipment Acquisition	11.42.20	Router/Wi-Fi		1	$3,021	$3,021	$3,021	$755
Use drop-down to select request description	ADP Hardware Acquisition	11.42.07	AVL System		1	$12,540	$12,540	$12,540	$3,135
Use drop-down to select request description	Bus Passenger Shelters Acquisition	11.32.10	Bus shelter post design services and construction with amenities including shelter, bench, bike rack, trash receptacle and ADA pad		4	$56,814	$227,257	$227,257	$56,814
Use drop-down to select request description							$0	$0	$0
Use drop-down to select request description							$0	$0	$0
	Total						$242,818	$242,818	$60,705

Service Characteristics			
Service Characteristic	**Before Project**	**If the grant is awarded**	**Data Collection/Calculation Method**
Unlinked Passenger Trips (UPT)	**175,927**	175,927	Electronic Fareboxes and Mobile Ticketing System
Unduplicated Passengers per Year	**175,927**	175,927	Electronic Fareboxes and Mobile Ticketing System

Instructions for TransCIP Attachments

Each form and certification provides FDOT with information it must have to make required assurances to the Federal government and to make project selections. It is important that each required form and certification be complete and correct. Applicants should be aware that there are criminal sanctions for furnishing false information in order to obtain federal grants (18 U.S.C. 1001, Crimes and Criminal Procedure – Statements or entries generally).

The complete application should be uploaded into the Department's grant management system (TransCIP). Electronic resolutions, applications, and acceptance of grant awards are acceptable. Incomplete, illegible, or unsigned applications may be rejected.

Questions regarding Section 5310 applications or the application process should be directed to the FDOT District Office in the applicant's service area, as shown in the Resources tab. All signature pages must be completed following the board resolution date. Some forms may not be required based on the type of application being submitted, please review the following details to understand form requirements. Each applicant will be responsible for attaching applicable forms to project application within TransCIP.

1 - Grant Proposal Excel Workbook - Each program application should contain the Grant Proposal provided within this Excel Workbook. This workbook has a built in validation process to ensure completion based on the projects submitted. Once complete Excel Workbook should be uploaded to TransCIP within the associated opportunity.

2 - Cover Letter - A sample cover letter is included in the grant application for reference. The cover letter must be completed on agency letterhead and signed by the agency representative authorized in the Governing Board's Resolution. This representative must be the same individual referenced throughout the application as "the authorized agency representative." This ensures one consistent point of contact for questions and follow-up regarding the application.

3 - Governing Board's Resolution - A sample resolution form is included in the grant application for reference. The resolution must be completed on agency letterhead and signed by the chairperson of the agency's board. A new signed resolution must be submitted for each grant application and reference each program that is being applied for in that year.

4 - Public Hearing Notice - An opportunity for a public hearing is required ONLY for public agencies requesting capital grants under Section 5310. An application for Section 5310 submitted by a public agency should contain a copy of the notice of public hearing and an affidavit of publication. A sample public notice is in the application. A public notice should contain all pertinent information relating to the project (such as number and types of vehicles as well as the estimated cost of the vehicles) and should be published at least one time in a newspaper of general circulation in the applicant's service area, no less than 15 or more than 30 days prior to the submission of an application. The notice should state that persons requesting a hearing must notify the applicant of the request, in writing, and send a copy of the request for a hearing to the FDOT District Office.

The deadline for hearing requests must be prior to the date applications are due at the District Office. If a hearing is requested:
1 - A hearing must be conducted;
2 - The FDOT District Office must be notified of the date, time, and location of the hearing; and
3 - A copy of the minutes of the hearing (to include a discussion of issues raised and resolution of issues) must be submitted to the FDOT District Office, before a Section 5310 award can be made.

5 - Coordinated Public Transit - Human Service Transportation Plan - This attachment is to be completed and signed by the individual authorized by the governing board of the applicant's agency and uploaded into TransCIP with the grant application. Please attach cited plan pages, ensuring use of the most current plan update.

6 - CTC Agreement or Certification - If the applicant is a CTC, this information should be uploaded in TransCIP using the appropriate link. A copy of the CTC's certification must be uploaded.

If the applicant is not a CTC, a copy of the written coordination agreement (or letter of support) between the applicant and the CTC in the appropriate service area should be uploaded. The agreement must be specific as to how the services to be provided will be complimentary to the services the CTC provides, and how duplication and fragmentation of services will be avoided.

If the applicant's service extends into areas covered by more than one CTC, copies of all applicable coordination agreements should be uploaded into TransCIP.
An executed Commission for the Transportation Disadvantaged Coordination Contract or similar document may serve as the written coordination agreement.
Applications submitted without the appropriate coordination agreement may be rejected by FDOT. Grant awards will not be made without an appropriate coordination agreement.

Agencies must keep their CTC Agreements current and valid at all times when receiving an award under the Section 5310 Program. Agencies must also keep their CTC Agreements current and valid every year until the vehicle(s) reaches its useful life requirement and the title is released.

7 - FDOT Certification and Assurances - To be completed and signed by the individual authorized by the governing board of the applicant agency and uploaded into TransCIP.

8 - Standard Lobbying Certification - All grant awards issued to a recipient in the amount of $100,000 or more must include a standard lobbying certification signed by the authorized agency representative.

9 - Leasing Certification - This certification must be completed by all applicants for capital assistance and signed by the authorized agency representative. This certification does not need to be completed if the applicant plans to lease the vehicle. It also must be completed to certify that the agency will NOT lease the vehicle if that is the case.

10 - Certification of Equivalent Service - The "Certification of Equivalent Service" must be completed for all non-accessible vehicles.

11 - Form 424: Application for Federal Assistance - ALL applicants must complete the Standard Application for Federal Assistance (OMB 4040-0004 Form 424). The code assigned to the Section 5310 Program in the Catalog of Federal Domestic Assistance is 20.513. This code should be shown in Section 11 of the form followed by the title: "Formula Grants for the Enhanced Mobility of Seniors and Individuals with Disabilities Program."

Further instructions for Form 424 can be found on the "Resources" tab with in this workbook.

12 - Federal Certifications and Assurances - The last page (Appendix A) of the annual Federal Register Notice that applies to Federal Certifications and Assurances provides applicants with a single signature page on which an applicant and its attorney must certify compliance with the requirements of the various FTA grants or cooperative agreements. The Federal Register Notice is revised annually and is usually available around January 1 of each year. Applicants may obtain a copy of the current year document through the internet at the FTA website. If unable to access the form, applicants may contact their FDOT District Office for assistance. The appropriate signed Federal certification/assurance form must be included in the application when it is submitted to the FDOT District Office.

If the FTA Certifications & Assurances are not available for the year of application, applicants may use the previous year's form. When the current year form becomes available, applicants must submit an updated form. The signature page for Federal Certifications and Assurances (include the page listing the certification categories) must be signed by the individual authorized by the applicant's governing board to sign and submit applications, and its attorney.

All applicants must use the current year form and it must be the actual form from the FTA. This form cannot be an edited version of a prior year's forms or a recreation of the form. DO NOT copy Federal Certifications & Assurances onto agency letterhead for signature, it will be returned to you and delay processing your grant request.

13 - Title VI Plan ***(Required if not previously submitted to District)*** **-** If an applicant has not previously submitted their Title VI plan to the Department, a copy must be included with the application. Returning applicants may provide the Title VI Concurrence letter.

14 - Protection of the Environment ***(Required if the proposed project is for facilities)*** - Most transit projects funded under Section 5310 will be classified by FTA as categorical exclusions. Examples of categorical exclusions include purchase of transit vehicles, and purchase of office equipment. If the proposed project is for construction or acquisition of facilities or other buildings, further evaluation may be required before a determination can be made that the project is a categorical exclusion. A Categorical Exclusion (CE) is described in 40 Code of Federal Regulations (CFR) 1508.4 and 23 CFR 771, as a project which, based upon experience with similar actions, does not individually or cumulatively have a significant environmental effect, and is excluded from the requirement to prepare an Environmental Assessment (EA) or an Environmental Impact Statement (EIS). Therefore, a project that qualifies as a CE generally requires a lower level of documentation. These projects do not bring significant impacts to planned growth or land use for the area; do not require the relocation of significant numbers of people; do not have a significant impact on any natural, cultural, recreational, historic, or other resources; do not involve significant air, noise, or water quality impacts; do not have significant impacts on travel patterns; and do not otherwise individually or cumulatively have any significant environmental impacts.

Types of projects that have been determined by FTA to qualify as CEs, and normally do not require any further National Environmental Policy Act (NEPA) approvals by FTA, are listed in 23 CFR 771.118(c). Additional actions which meet the criteria for a CE but may be designated as CEs only after FTA approval are listed in 23 CFR 771.118(d). In these cases, the applicant must submit documentation which demonstrates that the specific conditions or criteria for these CEs are satisfied and that significant environmental effects will not result. To meet the requirements of a CE determination, a proposed project may not be impermissibly segmented from a larger project. This means that a project may be proposed to be implemented in phases or as part of a larger undertaking, but must still demonstrate independent utility, connect logical termini, and should not restrict consideration of alternatives. In order to meet a CE designation, a proposed project cannot have substantial controversy on environmental grounds, or significant impact to properties protected by Section 4(f) of the US DOT Act (public park and recreation lands, wildlife and waterfowl refuges, and historic sites) or Section 106 of the National Historic Preservation Act (cultural resources including historic and archaeological sites). The presence of features such as wetlands and floodplains within the project area would likely also require additional documentation.

The applicant should contact the Florida Department of Transportation (FDOT) District Office for assistance with determining the level of documentation required. The FDOT will use a description of the proposed project, along with any maps or figures to assist with determining if a proposed project is likely to meet FTA criteria for a CE. See the Resources tab for a link to the FTA Region 4 Categorical Exclusion checklist.

15 - Local Clearinghouse Agency/RPC Cover Letter ***(Required if proposed project is for facilities)*** - If the grant application is for facilities, please include a copy of the cover letter submitted to the local clearinghouse agency or RPC.

16 - Organization Chart - Upload a full organizational chart for your organization into TransCIP as part of your application documents, this is required for all program applications regardless to type of project.

17 - Proof of Local Match - Supporting documentation of match funds must be uploaded into TransCIP. Proof may include, but is not limited to:

(1) Transportation Disadvantaged (TD) allocation,
(2) Letter on official letterhead from the applicant's CEO attesting to match availability and commitment,
(3) Written statements from county commissions, state agencies, city managers, mayors, town councils, organizations, accounting firms and financial institutions.

18 - Proof of Non-Profit Status - Upload proof of non-profit status (if a private-non-profit agency).

19 - Certification of Incorporation - Provide if applicant is a private-non-profit agency. Please visit https://dos.myflorida.com/sunbiz/start-business/efile/fl-nonprofit-corporation/ for more information

20 - Completed Sample Order Form - To identify vehicle type and estimated cost visit http://tripsflorida.org/. NOTE: All vehicle requests must be supported with a completed sample order form for estimating the vehicle cost. The order form can be obtained from http://www.tripsflorida.org/contracts.html

1. Select Desired Vehicle (Cutaway, Minibus etc.)
2. Choose Vendor (use drop down arrow next to vendor name to see information)
3. Select Order Packet
4. Complete Exhibit A (Order Form)

The Florida Department of Management Services Contract can be found at Florida Department of Management DMS (https://www.dms.myflorida.com/)

21 - Transportation Operating Procedure (TOP)/System Safety Program Plan (SSPP) - Most FDOT subrecipients fall under the requirements of Florida Administrative Code Rule 14-90. Some recipients only receive grant awards through the Federal Transit Administration's Section 5310 Program. The Transportation Operating Procedure (TOP) applies only to agencies receiving ONLY 5310 funds from FDOT/FTA. The TOP will include procedures related to maintenance, operations (Driver Training Policy), and safety. The agency's TOP will be subject to FDOT triennial review every 3 years (a template can be found within the FDOT State Management Plan).

All returning subrecipients must include the most recent TOP in the application package if revisions were made. If no revisions were completed, the returning subrecipient should upload the TOP approval letter issued by the local FDOT District. If an applicant is a first-time applicant, then the applicant should upload a commitment letter stating that a compliant TOP will be developed will be developed prior to award; no official award will be made by FDOT until the applicant has a fully adopted and FDOT approved TOP. Upon request, FDOT will provide technical assistance concerning the development of a TOP.

22 - Triennial Review- Closeout/Concurrence Letter or CAP - Required if the agency's latest Triennial Review included a CAP. The CAP is required once a deficiency and /or area of concern is identified after FDOT completes a triennial review and inspection. For more information see FDOT's Triennial Review Process as part of the State Management Plan at https://www.fdot.gov/transit/currentpages/navigation/grantsadministration.shtm.

You may upload other relevant documents such as project timelines, scopes or RFPs into TransCIP in the "Additional Documents" folder associated with the application.

I have read and understood the contents of this tab. ☑

Resources

Evaluation Criteria

Section 5339 funds shall be awarded to eligible recipients on the basis of merit and need in accordance with the below evaluation criteria. Quantified scores and ranks are developed to enable further analysis and may be used to drive project prioritization or simply serve as a record of the reason for decision-making. The final decision to award any applicant is at the discretion of the FDOT District Office.

Criteria	Detail	Maximum Score
Funding Program Access	Section 5339 Rural funding is very limited. To the extent possible funding should be prioritized for projects that do not have the opportunity to funded elsewhere. Based on the number of programs available to fund the project, the District will assign points out of a maximum 30 for this category.	30
Needs Assessment (1)	Based on the review of the agency's budget and other factors outlined in scorecard criteria.	15
Needs Assessment (2)	Project is identified in the FDOT State Group Transit Asset Management (TAM) Plan or agency TAM plan.	15
Project Description	Based on review team member assessment of project merit and District project priorities.	40
Total Score	**Informs project prioritization relative to other project proposals evaluated for the same application period on a 100-point scale.**	**100**

What's on the Market

Visit the FDOT TRIPS website (https://tripsflorida.org/) for all active contracts. The Florida Department of Management Services Contract can be found at the Florida Department of Management DMS website (https://www.dms.myflorida.com)

Navigate to: business_operations/state_purchasing/state_contracts_and_agreements/state_term_contract/motor_vehicles/pricing

FDOT Vehicle Useful Life Benchmarks 2006-2022

Vehicle Category (Source: FTA Useful Life of Transit Buses - 2007)			Light-Duty Van, Sedan or Bus		Light-Duty Van, Sedan or Bus		Light-Duty Van, Sedan or Bus		Light-Duty Mid-Size Bus		Light-Duty Mid-Size Bus		Light-Duty Mid-Size Bus		Medium-Duty Bus		Medium-Duty Bus		Medium-Duty Bus		Heavy-Duty Large Bus	
Vehicle Type (Source: NTD)	Equipment (non-revenue)		Automobile (AO)		Van (VN)		Van (VN)		Cutaway (CU)		Cutaway (CU)		Cutaway (CU)		Bus (BU)		Cutaway (CU)		Bus (BU)		Bus (BU)	
	Formerly Type "G"		Formerly Type "F"		Formerly Type "F"		Formerly Type "E"		Formerly Type "E"		Formerly Type "D"		Formerly Type "D"		Formerly Type "D"		Formerly Type "C"		Formerly Type "C"		Formerly Type "B"		Formerly Type "A"	
Vehicle Description (Source: TRIPS/DMS Contracts)	Service Trucks		Sedans/Station Wagons		Vans/Commuter Van (Unmodified)		Mini Vans (Modified)		MiniBus (Modified)		Transit Bus - Standard Cutaway		Small Cutaway		Transit Bus - Small Cutaway (Low Floor)		Medium Duty Bus (Arboc)		Medium Duty Bus (Champion)		Medium Duty Bus (El Dorado)		Heavy Duty	
Year	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**	**Age**	**Mileage**
2022	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2021	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2020	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2019	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000	7	250,000			10	350,000	12	500,000
2018	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000					10	350,000	12	500,000
2017	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000					10	350,000	12	500,000
2016	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000					10	350,000	12	500,000
2015	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2014	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000
2013	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000	5	200,000			7	250,000	10	350,000	12	500,000

2012	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000		7	250,000	10	350,000	12	500,000										
2011	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	5	200,000		7	250,000	10	350,000	12	500,000										
2010	5	150,000	4	100,000	4	100,000	5	200,000	5	200,000	5	200,000	7	200,000		7	250,000	10	350,000	12	500,000										
2009	5	150,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000		7	250,000	10	350,000	12	500,000										
2008	5	150,000	4	100,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000		7	250,000	10	350,000	12	500,000								
2007	5	150,000	4	100,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000		7	250,000	10	350,000	12	500,000								
2006	5	150,000	4	100,000	4	100,000	4	100,000	4	100,000	5	150,000	5	150,000	7	200,000		7	250,000	10	350,000	12	500,000								

Useful Life Requirements

ASSET	USEFUL LIFE	SOURCE
TROLLEYS		
Fixed guideway steel-wheeled	25 years	FTA Circular 5010.1D
Fixed guideway electric, rubber tires	15 years	FTA Circular 5010.1D
Simulated trolleys (rubber tires, internal combustion engine)	Refer to bus useful life	FTA Circular 5010.1D
Rail Vehicles	25 years, see circular	FTA Circular 5010.1D
FERRIES		
Passenger ferries	25 years	FTA Circular 5010.1D
Other ferries (w/o refurbishment)	30 years	FTA Circular 5010.1D
Other ferries (w/refurbishment)	60 years	FTA Circular 5010.1D
FACILITIES		
Buildings- concrete, steel and frame construction	40 years	FTA Circular 5010.1D
OTHER CAPITAL EQUIPMENT		
Fare boxes	10 years	Manufacturer /Industry Standards
Computer hardware	4 years	GAAP Guidelines/Industry Standards
Computer hardware- Domain controllers	4 years	Industry Standards
Mobile data computers (real-time dispatching)	7 years	Manufacturer
Computer software	4 years	GAAP Guidelines/Industry Standards
Computer software- HASTUS	4 years	Manufacturer
Computer software- ADP	4 years	Industry Standards
Scheduling/fleet management software	4 years	GAAP Guidelines/Industry Standards
Communications equipment, mobile radios, base stations	10 years	GAAP Guidelines/Industry Standards
Security/Surveillance equipment, cameras for vehicles	Same as useful life of vehicle	
Security/Surveillance equipment, cameras for buildings	10 years	Industry Standards
Shop equipment- Alignment machines, bus washing, tire changers	10 years	Manufacturer
Bus lift	20 years	Manufacturer
Wheelchair lift	Same as useful life of vehicle	
Bus shelters	15 years	Industry Standards
Bus shelter/stop benches	10 years	Manufacturer
Office furniture	10 years	Manufacturer
Carpeting	5 years	Manufacturer
Repeater tower	25 years	Manufacturer
Engine for bus/trolley	4 years	Industry Standards
Bus stop signage	10 years	Industry Standards
HVAC parts	5 years	Grantee experience
Asphalt parking lot	15 years	GASB
Thermal diesel particle filter cleaner	10 years	Manufacturer
Commercial roofing	15 years	Industry Standards

Local Clearinghouses / Regional Planning Councils (RPCs)

Clearinghouse/RPC	Contact Information	Covered Counties
West Florida RPC 4081-A East Olive Rd. Pensacola, FL 32514	Austin Mount austin.mount@wfrpc.org (850) 332-7976 (800) 226-8914	Bay, Escambia, Holmes, Okaloosa, Santa Rosa, Walton, & Washington
Apalachee RPC 2507 Callaway Rd. Suite 200 Tallahassee, FL 32303	Chris Rietow crietow@thearpc.com (850) 488-6211	Calhoun, Franklin, Gadsden, Gulf, Jackson, Jefferson, Leon, Liberty, Wakulla
North Central Florida RPC 2009 NW 67th Place Gainesville, FL 32653-1603	Scott Koons skoons@ncfrpc.org (352) 955-2200 ext. 103	Alachua, Bradford, Columbia, Dixie, Gilchrist, Hamilton, Lafayette, Levy, Madison, Marion, Suwannee, Taylor, Union
Northeast Florida RPC 6850 Belfort Oaks Place Jacksonville, FL 32216	Eric Anderson eamderspm@nefrpc.org (904) 279-0880 ext. 178	Baker, Clay, Duval, Flagler, Nassau, Putnam, St. Johns
East Central Florida RPC 455 North Garland Avenue Fourth Floor Orlando, FL 32801	Brenda Defoe-Surprenant bdefoe-surprenant@ecfrpc.org (407) 245-0300 ext. 336	Brevard, Lake, Orange, Osceola, Seminole, Sumter, Volusia
Central Florida RPC Post Office Drawer 2089 Bartow, FL 33830	Marybeth Soderstrom msoderstrom@cfrpc.org (863) 534-7130 ext. 134	DeSoto, Hardee, Highlands, Okeechobee, Polk
Tampa Bay RPC 4000 Gateway Center Blvd. Suite 100 Pinellas Park, FL 33782-6141	John Meyer johnm@tbrpc.org (727) 570-5151 ext. 10	Citrus, Hernando, Hillsborough, Manatee, Pasco, Pinellas
Southwest Florida RPC 1926 Victoria Ave Fort Myers, FL 33901	Nicole Gwinnett ngwinnett@swfrpc.org (239) 338-2550 ext. 232	Charlotte, Collier, Glades, Hendry, Lee, Sarasota

Treasure Coast RPC 421 Southwest Camden Ave Stuart, FL 34994	Stephanie Heidt sheidt@tcrpc.org (772) 221-4060	Indian River, Martin, Palm Beach, St. Lucie
South Florida RPC 3440 Hollywood Blvd. Suite 140 Hollywood, FL 33021	Kathe Lerch klerch@sfrpc.com (954) 985-4416	Broward, Miami-Dade, Monroe

FDOT District Office Contacts

District 1		P.O. Box 1249 801 North Broadway Bartow, FL 33830-1249
Paul A. Simmons	(863) 519-2388 Paul.Simmons@dot.state.fl.us	District Modal Development Manager
Michelle Peronto	(863) 519-2551 Michelle.Peronto@dot.state.fl.us	Transit Programs Administrator
Dale Hanson	(863) 519-2321 Dale.Hanson@dot.state.fl.us	Transit Projects Coordinator (ATKINS) Counties: *Highlands, Hardee, Okeechobee, DeSoto, Polk*
Stacy Booth	(863) 519-2562 Stacy.Booth@dot.state.fl.us	Transit Projects Coordinator Counties: *Charlotte, Lee, Glades, Hendry*
Victoria Upthegrove	(863) 519-2484 Victoria.Upthegrove@dot.state.fl.us	Transit Projects Coordinator Counties: *Sarasota, Manatee, Collier*
Michele Forestt	(863) 519-2412 Michele.Forestt@dot.state.fl.us	Transit Support Consultant
District 2		2198 Edison Ave, MS 2806 Jacksonville, FL 32204
Doreen Joyner-Howard	(904) 360-5650 Doreen.Joyner-Howard@dot.state.fl.us	Modal Development Manager
Geanelly Reveron	(904) 360-5684 Geanelly.Reveron@dot.state.fl.us	Transit Manager
Janell Damato	(904) 360-5687 Janell.Damato@dot.state.fl.us	Rural/Urban Transportation Coordinator
Angela Gregory	(904) 360-5667 Angela.Gregory@dot.state.fl.us	Transportation Coordinator
District 3		P.O. Box 607 Chipley, FL 32428-9990
Scott Walters	(850) 330-1553 Scott.Walters@dot.state.fl.us	District Modal Development Manager
Debbie "Toni" Prough	(850) 330-1558 Debbie.Prough@dot.state.fl.us	Public Transit Program Specialist
District 4		3400 W Commercial Blvd. Ft. Lauderdale, FL 33309
Birgit Olkuch	(954) 777-4689 Birgit.Olkuch@dot.state.fl.us	District Modal Development Administrator
Lisa Maack	(954) 777-4683 Lisa.Maack@dot.state.fl.us	Passenger Operations Manager
Jayne Pietrowski	(954) 777-4661 Jayne.Pietrowski@dot.state.fl.us	Senior Transit Coordinator
Marie Dorismond	(954) 777-4605 Marie.Dorismond@dot.state.fl.us	Transit Coordinator
District 5		420 W. Landstreet Road Orlando, FL 32824
Brian M. Stanger, P.E.	(386) 943-5543 Brian.Stanger@dot.state.fl.us	District Modal Development Administrator
Libertad Acosta-Anderson, P.E.	(386) 279-5470 Libertad.Acosta-Anderson@dot.state.fl.us	Passenger Operations Manager
Jo Santiago-Mercer	(321) 319-8175 Jo.Santiago-Mercer@dot.state.fl.us	Transit Intermodal Supervisor
Carlos Colon	(321) 319-8173 Carlos.Colon@dot.state.fl.us	Transit Project Coordinator
Jamie Ledgerwood	(386) 943-5195 Jamie.Ledgerwood@dot.state.fl.us	Transit Project Coordinator
District 6		1000 N.W. 111 Avenue Miami, Florida 33172
Raymond Freeman	(305) 470-5255 Raymond.Freeman@dot.state.fl.us	Passenger Operations Manager
District 7		11201 N McKinley Dr. MS-7500 Tampa, FL 33612
Ming Gao	(813) 975-6923 Ming.Gao@dot.state.fl.us	District Modal Development Administrator
Chris Leffert	(813) 975-6403 Chris.Leffert@dot.state.fl.us	Transit Programs Administrator
Dave Newell	(813) 975-6195 Dave.Newell@dot.state.fl.us	Transit Coordinator

Glossary

Ambulatory - A person who is able to walk and move about freely without being confined to a bed or wheelchair.
Annual Operating Report (AOR) - A report outlining the expenses and revenues incurred during the preceding 12 months.
Applicant - An agency applying for Section 5339 Federal Assistance. See also "new applicant" and "recurring applicant."
Authorizing Federal and State Legislation - Legislation authorizing the Section 5310 program are: Fixing America's Surface Transportation Act (FAST Act) Section 3006; 49 U.S.C. Section 5310; FTA Circular 9070.1G; Section 341.051, Florida Statutes; and Chapter 14-73, Florida Administrative Code.

Community transportation coordinator (CTC) - A transportation entity recommended by an MPO, or by the appropriate designated official planning agency, as provided for in Sections 427.015(1), Florida Statutes, in an area outside the purview of an MPO, to ensure that coordinated transportation services are provided to the transportation disadvantaged population in a designated service area.

Contractor - The administering entity of the Transit Research Inspection and Procurement Services (TRIPS) who is under contract to the Florida Department of Transportation to establish statewide vehicle contracts for the purpose of procuring vehicles at the lowest cost possible while ensuring that the best product is available for the program. The Contractor is also responsible to coordinate, assist as needed, and report in all procurement activities under the Section 5310 Program.

Corrective Action Plan (CAP) – A required plan to address any deficiency and /or area of concern identified after FDOT completes a triennial review and inspection. For more information see FDOT's Triennial Review Process as part of the State Management Plan

Designated Official Planning Agency - A planning entity so designated by the Florida Commission for the Transportation Disadvantaged to conduct planning and support functions for the transportation disadvantaged services.

Disadvantaged Business Enterprise (DBE) - DBEs are for-profit, small business concerns where socially and economically disadvantaged individuals own at least a 51% interest and also control management and daily business operations.

District office - Florida Department of Transportation District Public Transportation Office or District Office of Modal Development and/or staff.

District Program of Projects (POP) - A district listing of each applicant agency for which a grant award is proposed, a description of the equipment to be awarded, and the proposed Federal, state and local share of the project cost. The district program of project includes certification by the District Office that all applicants and projects so proposed either meet all program requirements or will meet all program requirements before a Notice of Grant Award and/or Public Transportation Grant Agreement is executed.

Eligible expenses - Section 5339 funds may be used for the capital expense of public transportation services t. Eligible expenses are limited to buses, vans or other paratransit vehicles (including sedans and station wagons), radios and communications equipment, wheelchair lifts and restraints, vehicle rehabilitation, vehicle overhaul, data processing hardware/software, other durable goods such as spare components with a useful life of more than one (1) year and a per unit cost over $300, initial installation costs, vehicle procurement/testing, vehicle inspection and vehicle preventative maintenance, passenger facilities, support facilities and equipment.

Eligible recipient, 5339 - For the Section 5339 Program, funds may be awarded to public agency Community Transportation Coordinators (CTCs), private-non-profit CTCs, and to private non-profit organizations providing transportation to seniors and/or persons with disabilities under a coordination agreement with a CTC. When the CTC is a private for-profit agency, the designated official planning agency responsible for designating the CTC may apply for Section 5310 funds, then sub-contract with the CTC for provision of service. Recipients must be either a CTC or providing service under the terms of a written agreement with a CTC. Agencies must keep their CTC Agreements current and valid at all times when receiving an award under the Section 5310 Program. Private taxi companies that provide shared-ride taxi service to the general public on a regular basis are eligible sub-recipients. "Shared-ride" means two or more passengers in the same vehicle who are otherwise not traveling together.

Expanded service - Adding a new service to an already existing system.

FDOT control number - Is assigned by the Contractor once the vehicle has been purchased, received and titled to the recipient with the Department of Transportation as the first lienholder**.**

Human service transportation - Transportation services provided by or on behalf of a human service agency to provide access to agency services and/or to meet the basic, day-to-day mobility needs of transportation-disadvantaged populations, especially individuals with disabilities, older adults, and people with low incomes.

Incurred - Commitment or obligation to spend funds for goods to be received or services to be rendered.

Large Urbanized Area - An urbanized area (UZA) with a population of 200,000 or more individuals, as determined by the Bureau of Census.

Limited English Proficiency (LEP) - Individuals who do not speak English as their primary language and who have a limited ability to read, speak, write, or understand English can be limited English proficient, or "LEP." These individuals may be entitled to language assistance with respect to a particular type of service, benefit, or encounter. DOT recipients are required to take reasonable steps to ensure meaningful access to their programs and activities by LEP persons.

Metropolitan Planning Organization (MPO) - MPOs are the policy and planning bodies, designated by the Governor, responsible for transportation planning in urbanized areas.

New applicant - An applicant for Section 5339 assistance that has not received an award in the last two fiscal years.

New service - A first time applicant starting a new service.

Non-ambulatory - A person who has a mobility impairment that prevents them from being able to walk or move about freely.

Nonprofit organization - A corporation or association determined by the U. S. Secretary of the Treasury to be an organization described by 26 U.S.C. Section 501(c) which is exempt from taxation under 26 U.S.C. Section 501(a) or one incorporated within Florida which is certified as not for profit by the Secretary of State.

One-way passenger trips - A person who rides a transportation vehicle in one direction between two points for a specific purpose.

Operating revenue - For Section 5339, operating revenue includes the sum of all fares paid by passengers, whether such fares are paid at the time service is provided or via a prepaid arrangement such as passes or tokens. Operating revenue excludes revenues from contracts with social service agencies that pay for transportation of social service clients.

Private organization - Non-public organizations, bodies which are not municipalities or other political subdivisions of the State of Florida; are not public agencies or instrumentalities of one or more states; are not Indian Tribes (except private nonprofit corporations formed by Indian Tribes); are not public corporations, boards or commissions established under the law of any state; or are not subject to direct control by public authority, Federal, State, county, or municipal.

Program of Projects (POP) - A list of projects to be funded in a grant application submitted to the Federal Transit Administration by the Florida Department of Transportation. The program of projects (POP) lists the sub-recipients and indicates whether they are private non-profit agencies or local governmental authorities, designates the areas served (including rural areas), and identifies any tribal entities. In addition, the POP includes a brief description of the projects, total project cost and Federal share for each project, and the amount of funds used for program administration from the ten percent (10%) allowed.

Public agency- An authority, commission, committee, council, department, division, bureau, board, section or any other unit or entity of the state or of a town, city, municipality, county or other local governing body.

Public transit - The transporting of people by conveyances or systems of conveyances, traveling on land or water, local or regional in nature, and available for use by the general public. Public transit specifically includes those forms of transportation commonly known as "paratransit" characterized by their non-scheduled, non-fixed route nature.

Public Transportation Grant Agreement (PTGA) - A contract between FDOT and a local sponsor of a transportation project, defining a project and FDOT's participation. PTGA's may be for one year or multiple years (up to five years), at the discretion of FDOT.

Recipient - The Florida Department of Transportation, a State Agency designated by the Governor to receive funds apportioned by formula to the States under Section 5339(b)(1), or a local government authority when Federal Highway Administration (FHWA) funds are flexed to Section 5339.

Recurring applicant - An applicant for Section 5339 Federal Assistance who applies every year.

Rural areas - An area encompassing a population of fewer than 50,000 people that has not been designated in the most recent decennial census as an urbanized area by the Secretary of Commerce.

Small Urbanized Area (UZA) - A UZA with a population of at least 50,000 but less than 200,000, as determined by the Bureau of the Census.

Sub-recipient - A private non-profit organization, if the public transportation service provided is unavailable, insufficient, or inappropriate; or a governmental authority that is approved by the State to coordinate services for elderly individuals and individuals with disabilities or certifies that there are not any non-profit organizations readily available in the area to provide the services.

Transit Development Plan (TDP) - A locally adopted document, addressing a minimum five-year time frame. It is prepared by the public transit provider, in cooperation with the appropriate Metropolitan Planning Organization. It is consistent with the applicable approved local government comprehensive plan. The TDP includes an assessment of the need for transit services in the local area, identifies the local transit policies, existing services and proposed service improvements, capital and operating costs of the proposed services, existing and proposed sources of funding and a staged implementation plan. A TDP is updated annually.

Transportation disadvantaged - Those persons who because of physical or mental disability, income status, or age, or who, for other reasons, are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to health care, employment, education, shopping, social activities, or other life-sustaining activities, or children who are handicapped or high-risk as defined in Chapter 411.202 F.S.

Transportation Disadvantaged Service Plan (TDSP) - A plan developed by the CTC and approved by the Local Coordinating Board that identifies service gaps and provides recommended strategies to provide service in areas of need. The TDSP may serve as the Local Coordinated Human Services Transportation Plan. The TDSP is updated annually but includes a five-year planning window.

Transportation Improvement Program (TIP) - A continuing, cooperative and comprehensive planning process that delineates transportation improvements recommended for Federal and state funding during the program period. The MPO submits the TIP to the Florida Department of Transportation as required by Chapter 339, Florida Statutes.

Transportation operator contract - A written contract between the CTC and the transportation operator prepared at the local level that outlines the terms and conditions for any services to be performed.

Urbanized area - An area encompassing a population of not less than 50,000 people that has been defined and designated in the most recent decennial census as an urbanized area by the Secretary of Commerce.

Form 424 Instructions

Item	Entry
1	Type of Submission should be "Application"
2	Type of Application should be "New"
3	"Not Applicable"
4	"Not Applicable"
5. A	"Not Applicable"
5 B	Federal Award Identifier (FTA Grant Number) is not needed at this time. This number will be assigned after submission of State POP.
6	State use only (if applicable)
7	State Application Identifier is "1001"
8.a, b, c, d e, f	Enter legal name of applicant, name of primary organizational unit (including division, if applicable), which will undertake the assistance activity, enter employer/taxpayer identification number (EIN/TIN) as assigned by Internal Revenue Service, enter the organization's UEI number (received from Dun and Bradstreet), enter the complete address of the applicant (including country), and name, telephone number, e-mail and fax of the person to contact on matters related to this application.
9	Type of Applicant 1: Select Applicant Type
10	Name of Federal Agency should be "Federal Transit Administration"
11	Catalog of Federal Domestic Assistance Number is: 20.526 CFDA Title should be: Bus and Bus Facilities for Rural Areas
12	"Not Applicable"
13	"Not Applicable"
14	List the areas affected by project (cities, counties, states etc.). Can be submitted on a separate piece of paper.
15	Enter a brief descriptive title of the project. If appropriate (e.g., construction or real property projects), attach a map showing project location.
16	List (a) the applicant's Congressional District and (b) any Congressional District(s) affected by the program or project. Find your district here: https://www.house.gov/representatives/find-your-representative
17	Enter the proposed start date and end date of the project (dates must be within the same 12-month period/calendar year).
18	Enter the amount of the grant request. For **capital** applications, the federal amount is 80% of the total cost.
19	Check "c. Program is not covered by E.O. 12372."
20	Check the applicable box. If "yes", provide explanation in attachment.
21	Must be signed by the governing board representative that was authorized to sign this particular application.

Resources and Links

Procurement Guidance for Transit Agencies (June 2024)
Section 5339 FTA Circular
State Management Plan
Congressional Districts
Department of Management Services (DMS)
Disclosure of Lobbying Activities
Federal Audit Clearinghouse
FTA Certifications & Assurances
My Florida Marketplace
Standard Form 424
Sunbiz
TransCIP – FDOT's Transit Grant Management System
TRIPS Florida
FTA NEPA Categorical Exclusion Checklist
Florida Urban Areas Map (2020 Census)

EXECUTIVE SUMMARY
Reports and Presentations
Item 6a
November Route Changes

Objective:
To update the committee on the service modifications implemented with the seasonal schedule change effective November 17th, 2024.

Considerations:
Staff has been working hard on changes to the seasonal schedule. Changes will be implemented across multiple Collier Area Transit routes. As part of the process and to ensure public is properly notified in advance of the changes, the proposed schedule modifications have been distributed throughout the community and posted on social media as well as on RideCAT.com.

Many of the changes being implemented this season are an effort to improve the On-Time Performance of our fixed route service. With many changes implemented over the past few years, we have collected data on the run times and asked drivers for their input, resulting in adjustments to the timepoints to give riders a more accurate estimation of when the busses will be at their stop.

The only significant route changes, outside of timepoint adjustments, are related to the Route 22 and Route 19. Route 22 has removed the morning outbound trip from the Government Center to Immokalee, as well as removing the evening inbound trip from Immokalee to CAT Ops. Route 22 now has a small segment in the morning period of the timetable in order to provide a connection to the Route 19 Express leaving the Immokalee Health Department at 5:30 AM. The Route 19 Express will now be out of service on the way to Immokalee to service the Route 22 segment before starting service as Route 19.

Changes are available for public review online and have been posted on social media for public awareness.

Recommendation:
None.

Attachment:
Proposed 2024 Seasonal Changes

Prepared by: _____ **Date:** 11/14/2024
Alexander Showalter, PTNE Senior Planner

Approved by: _____ **Date:** 11/14/2024
Brian Wells, PTNE Division Director



SERVICE CATEGORY	FULL FARE	REDUCED FARE*
One-way Fare	$2.00	$1.00
Children 5 years of age and younger	FREE	FREE
Transfers	FREE up to 90 minutes	FREE up to 90 minutes
Day Pass	$3.00	$1.50
Marco Express One-way Fare	$3.00	$1.50

SMART CARD PASSES	FULL FARE	REDUCED FARE*
15-Day Pass	$20.00	$10.00
30-Day Pass	$40.00	$20.00
Marco Express 30-Day Pass	$70.00	$35.00

DISCOUNT PASSES	COST
Summer Paw Pass (Valid June 1st - August 31st for all students. Cost includes Smart Card)	$30.00
30-Day Perk Pass (250+ Employees corporate discount)	$29.75/mo.

*Reduced Fares are for members of Medicare, Disabled Community, those 65 years and older, children 17 and under, high school and college students and active/retired military personnel. ID required. This fare would also apply to the subcontracted transportation provider with the Florida Commission for the Transportation Disadvantaged that provides transportation services under the non-emergency transportation Medicaid Contract for Collier County.

rideCAT™

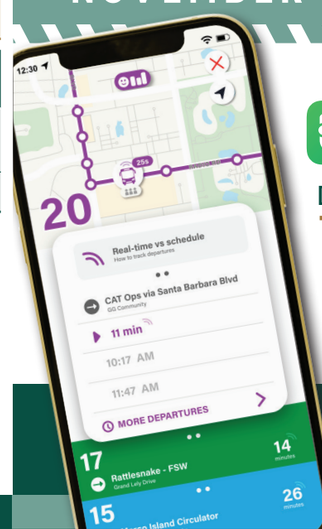
Scan code to download Transit app for FREE!

rideCAT™ COLLIER AREA TRANSIT

SYSTEM OVERVIEW MAP



NOVEMBER-APRIL 2025



transit

Download the free **Transit app** to get real-time updates, view route maps, and purchase bus passes.

239-252-7777
www.rideCAT.com

How to Ride



Please have your Smart Card, day pass, or exact fare ready. Sorry, drivers cannot make change. Show driver the pass, ticket or pay the correct fare and ride.

Note: Collier Area Transit is unable to transport large items such as surfboards, large strollers or anything else that would block the vehicles's aisles. Smaller strollers are permitted. Bicycles may be transported using the bike rack located at the front of each vehicle. Pets are not allowed, except for guide/assistance animals.

Arrive at the bus stop five minutes early. Buses operate as close to published timetables as traffic allows.

Como viajar

Por favor tenga lista su tarjeta, pase o cambio exacto. Lo sentimos, los choferes no pueden dar cambio. Muestre al chofer su pase, ticket o page la tarifa correcta.

Nota: Collier Area Transit no puede transportar objetos grandes tales como, tablas de surfear, coches grandes u otros objetos que pueda bloquear los pasillos del autobús. Los coches pequeños son permitidos. Las bicicletas pueden ser transportadas en la plataforma localizada en la parte delantera de los autobúses. Los animales no son permitidos, excepto animales de guía/asistencia.

Llegue a la parada cinco minutos antes. Los autobuses operan tan cerca del horario como el tráfico permite.

rideCAT™ COLLIER AREA TRANSIT



Passes can be purchased at the locations listed below:

Los pases pueden ser comprados en los lugeres debajo mencionados:

CAT Operations Center
8300 Radio Road

Government Center Transfer Station
3355 Tamiami Trail East



Collier County
Transportation Management Services Department
Public Transit & Neighborhood Enhancement Division

rideCAT COLLIER AREA TRANSIT
8300 Radio Road | Naples, FL 34104
Follow Us @rideCAT

TIME TABLES FOR ALL ROUTES

ROUTE 11

Gov't Center	US 41	US 41	US 41	Creekside Conn. W-LinC	US 41	US 41	US 41	Gov't Center
	GG Pkwy	Pine Ridge Rd	Mercato		Vand. Bch Rd	Pine Ridge Rd	Harbour Dr	
6:00 AM	6:15 AM	6:27 AM	6:32 AM	6:42 AM	6:52 AM	6:59 AM	7:05 AM	7:23 AM
7:00 AM	7:15 AM	7:27 AM	7:32 AM	7:42 AM	7:52 AM	7:59 AM	8:05 AM	8:23 AM
7:30 AM	7:45 AM	7:57 AM	8:02 AM	8:15 AM	8:25 AM	8:32 AM	8:38 AM	8:56 AM
8:30 AM	8:45 AM	8:57 AM	9:02 AM	9:15 AM	9:25 AM	9:32 AM	9:38 AM	9:56 AM
9:05 AM	9:20 AM	9:32 AM	9:37 AM	9:50 AM	10:00 AM	10:07 AM	10:13 AM	10:31 AM
10:05 AM	10:20 AM	10:32 AM	10:37 AM	10:50 AM	11:00 AM	11:07 AM	11:13 AM	11:31 AM
10:40 AM	10:55 AM	11:07 AM	11:12 AM	11:25 AM	11:40 AM	11:48 AM	11:54 AM	12:12 PM
11:40 AM	12:00 PM	12:14 PM	12:25 PM	12:36 PM	12:51 PM	12:59 PM	1:05 PM	1:24 PM
12:20 PM	12:40 PM	12:54 PM	1:03 PM	1:19 PM	1:29 PM	1:35 PM	1:43 PM	2:04 PM
1:35 PM	1:55 PM	2:09 PM	2:18 PM	2:34 PM	2:44 PM	2:50 PM	2:58 PM	3:19 PM
2:15 PM	2:35 PM	2:49 PM	2:58 PM	3:09 PM	3:19 PM	3:25 PM	3:33 PM	3:54 PM
3:30 PM	3:50 PM	4:04 PM	4:13 PM	4:24 PM	4:34 PM	4:40 PM	4:48 PM	5:09 PM
4:05 PM	4:27 PM	4:41 PM	4:52 PM	5:08 PM	5:18 PM	5:24 PM	5:32 PM	5:53 PM
5:20 PM	5:40 PM	5:51 PM	5:58 PM	6:12 PM	6:22 PM	6:28 PM	6:36 PM	6:57 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.
Times listed in RED are for a 2nd bus on the route / Las horas en ROJO son de un segundo autobús en la ruta

ROUTE 12

Gov't Center	Airport Rd	Airport Rd	Airport Rd	Creekside Conn. W-LinC	Airport Rd	Airport Rd	Airport Rd	Gov't Center
	Radio Rd	Pine Ridge	Vand. Bch Rd		Vand. Bch Rd	Pine Ridge	GG Pkwy	
6:05 AM	6:14 AM	6:23 AM	6:30 AM	6:41 AM	6:53 AM	7:02 AM	7:07 AM	7:22 AM
7:30 AM	7:39 AM	7:48 AM	7:57 AM	8:15 AM	8:29 AM	8:38 AM	8:43 AM	8:53 AM
9:05 AM	9:14 AM	9:23 AM	9:32 AM	9:50 AM	10:02 AM	10:11 AM	10:16 AM	10:26 AM
10:35 AM	10:48 AM	11:01 AM	11:15 AM	11:27 AM	11:41 AM	11:51 AM	11:57 AM	12:13 PM
12:25 PM	12:38 PM	12:51 PM	1:05 PM	1:17 PM	1:33 PM	1:43 PM	1:49 PM	2:05 PM
2:15 PM	2:28 PM	2:41 PM	2:55 PM	3:07 PM	3:24 PM	3:34 PM	3:40 PM	3:56 PM
4:05 PM	4:18 PM	4:31 PM	4:45 PM	5:04 PM	5:21 PM	5:31 PM	5:37 PM	5:53 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.

ROUTE 13

Gov't Center	Davis Blvd	NCH	Coastland Mall	Goodlette	Bayshore	Gov't Center
	Airport Rd			Central	US 41	
6:05 AM	6:10 AM	6:18 AM	6:25 AM	6:30 AM	6:36 AM	6:49 AM
7:05 AM	7:10 AM	7:18 AM	7:25 AM	7:30 AM	7:36 AM	7:49 AM
7:55 AM	8:00 AM	8:08 AM	8:15 AM	8:20 AM	8:26 AM	8:39 AM
8:45 AM	8:50 AM	8:58 AM	9:05 AM	9:10 AM	9:16 AM	9:29 AM
9:35 AM	9:40 AM	9:48 AM	9:55 AM	10:00 AM	10:06 AM	10:19 AM
10:25 AM	10:31 AM	10:44 AM	10:51 AM	10:56 AM	11:05 AM	11:21 AM
11:35 AM	11:41 AM	11:54 AM	12:01 PM	12:06 PM	12:15 PM	12:31 PM
12:40 PM	12:46 PM	12:59 PM	1:06 PM	1:11 PM	1:20 PM	1:36 PM
1:45 PM	1:51 PM	2:04 PM	2:11 PM	2:16 PM	2:25 PM	2:41 PM
2:50 PM	2:56 PM	3:09 PM	3:16 PM	3:21 PM	3:30 PM	3:46 PM
3:55 PM	4:01 PM	4:14 PM	4:21 PM	4:26 PM	4:35 PM	4:51 PM
5:00 PM	5:06 PM	5:19 PM	5:26 PM	5:31 PM	5:40 PM	5:56 PM
6:05 PM	6:11 PM	6:24 PM	6:31 PM	6:36 PM	6:45 PM	7:01 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.

ROUTE 14

Gov't Center	Thomasson	Bayshore	Goodlette	Coastland Mall	NCH	Gov't Center
	US 41	US 41	Central		8th St N	
6:30 AM	6:35 AM	6:45 AM	6:53 AM	6:58 AM	7:04 AM	7:17 AM
7:25 AM	7:30 AM	7:40 AM	7:48 AM	7:53 AM	7:59 AM	8:12 AM
8:20 AM	8:25 AM	8:35 AM	8:43 AM	8:48 AM	8:54 AM	9:07 AM
9:15 AM	9:20 AM	9:30 AM	9:38 AM	9:43 AM	9:49 AM	10:02 AM
10:10 AM	10:16 AM	10:26 AM	10:36 AM	10:43 AM	10:50 AM	11:05 AM
11:15 AM	11:21 AM	11:31 AM	11:41 AM	11:48 AM	11:55 AM	12:10 PM
12:20 PM	12:26 PM	12:36 PM	12:46 PM	12:53 PM	1:00 PM	1:15 PM
1:25 PM	1:31 PM	1:41 PM	1:51 PM	1:58 PM	2:05 PM	2:20 PM
2:30 PM	2:36 PM	2:46 PM	2:56 PM	3:03 PM	3:10 PM	3:25 PM
3:35 PM	3:41 PM	3:51 PM	4:01 PM	4:08 PM	4:15 PM	4:30 PM
4:40 PM	4:46 PM	4:56 PM	5:06 PM	5:13 PM	5:20 PM	5:35 PM

No Sunday service. / No servicio los domingos.

ROUTE 15

Gov't Center	Radio Rd	CAT OPS	Santa Barb Blvd	Green Blvd	Sunshine Blvd	Santa Barb Blvd	CAT OPS	Radio Rd	Gov't Center
	Airport Rd		GG Pkwy	Waverley Pl	GG Pkwy	GG Pkwy		Livingston	
							5:35 AM	5:47 AM	5:53 AM
6:00 AM	6:10 AM	6:20 AM	6:28 AM	6:34 AM	6:39 AM	6:46 AM	6:56 AM	7:08 AM	7:18 AM
7:25 AM	7:35 AM	7:45 AM	7:53 AM	7:59 AM	8:04 AM	8:11 AM	8:21 AM	8:33 AM	8:43 AM
8:50 AM	9:00 AM	9:10 AM	9:18 AM	9:24 AM	9:29 AM	9:36 AM	9:46 AM	9:58 AM	10:08 AM
10:20 AM	10:30 AM	10:40 AM	10:48 AM	10:54 AM	10:59 AM	11:06 AM	11:16 AM	11:28 AM	11:38 AM
11:50 AM	12:00 PM	12:10 PM	12:18 PM	12:24 PM	12:29 PM	12:36 PM	12:46 PM	12:58 PM	1:08 PM
1:20 PM	1:30 PM	1:40 PM	1:48 PM	1:54 PM	1:59 PM	2:06 PM	2:16 PM	2:28 PM	2:38 PM
2:50 PM	3:00 PM	3:10 PM	3:18 PM	3:24 PM	3:29 PM	3:36 PM	3:46 PM	3:58 PM	4:08 PM
4:20 PM	4:30 PM	4:40 PM	4:48 PM	4:54 PM	4:59 PM	5:06 PM	5:16 PM	5:28 PM	5:38 PM
5:50 PM	6:00 PM	6:10 PM	6:18 PM	6:24 PM	6:29 PM	6:36 PM	6:46 PM	6:58 PM	7:08 PM
7:20 PM	7:30 PM	7:40 PM	7:48 PM	7:54 PM	7:59 PM	8:06 PM	8:16 PM		

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.

ROUTE 16

Gov't Center	Radio Rd	CAT OPS	Santa Barb Blvd	Sunshine Blvd	Green Blvd	Santa Barb Blvd	CAT OPS	Radio Rd	Gov't Center
	Airport Rd		GG Pkwy	GG Pkwy	Santa Barb. Blvd	GG Pkwy		Livingston	
							4:35 AM	4:44 AM	4:57 AM
5:00 AM	5:08 AM	5:18 AM	5:26 AM	5:31 AM	5:40 AM	5:44 AM	5:54 AM	6:01 AM	6:16 AM
6:25 AM	6:35 AM	6:45 AM	6:53 AM	6:58 AM	7:07 AM	7:11 AM	7:21 AM	7:30 AM	7:43 AM
7:50 AM	8:00 AM	8:10 AM	8:18 AM	8:25 AM	8:34 AM	8:38 AM	8:48 AM	8:57 AM	9:10 AM
9:20 AM	9:30 AM	9:40 AM	9:48 AM	9:54 AM	10:03 AM	10:07 AM	10:17 AM	10:26 AM	10:39 AM
10:50 AM	11:00 AM	11:12 AM	11:20 AM	11:25 AM	11:34 AM	11:40 AM	11:51 AM	11:59 AM	12:15 PM
12:25 PM	12:35 PM	12:47 PM	12:55 PM	1:01 PM	1:10 PM	1:16 PM	1:27 PM	1:35 PM	1:51 PM
2:00 PM	2:10 PM	2:22 PM	2:30 PM	2:36 PM	2:45 PM	2:51 PM	3:02 PM	3:10 PM	3:26 PM
3:35 PM	3:45 PM	3:57 PM	4:05 PM	4:12 PM	4:21 PM	4:27 PM	4:38 PM	4:46 PM	5:02 PM
5:10 PM	5:20 PM	5:32 PM	5:40 PM	5:47 PM	5:56 PM	6:02 PM	6:13 PM		

No Sunday service. / No servicio los domingos.

ROUTE 17

Gov't Center	Rattlesnake Hawaii	FSW	Super Walmart	Physicians Reg 951	Rattlesnake County Barn	Gov't Center
6:00 AM	6:09 AM	6:19 AM	6:38 AM	6:49 AM	6:57 AM	7:10 AM
7:20 AM	7:29 AM	7:39 AM	7:58 AM	8:09 AM	8:17 AM	8:30 AM
8:40 AM	8:49 AM	8:59 AM	9:18 AM	9:29 AM	9:37 AM	9:50 AM
10:00 AM	10:11 AM	10:21 AM	10:43 AM	10:56 AM	11:06 AM	11:21 AM
11:30 AM	11:41 AM	11:51 AM	12:13 PM	12:26 PM	12:36 PM	12:51 PM
1:00 PM	1:11 PM	1:21 PM	1:43 PM	1:56 PM	2:06 PM	2:21 PM
2:30 PM	2:41 PM	2:51 PM	3:13 PM	3:26 PM	3:36 PM	3:51 PM
4:00 PM	4:11 PM	4:21 PM	4:43 PM	4:56 PM	5:06 PM	5:21 PM
5:30 PM	5:41 PM	5:51 PM	6:13 PM	6:26 PM	6:36 PM	6:51 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.

ROUTE 19 & 19 EXPRESS

Gov't Center	CAT OPS	Wilson Blvd GG Blvd	Health Department	Wilson Blvd GG Blvd	951 Green Blvd	Gov't Center
	3:35 AM	3:52 AM	4:37 AM	5:15 AM	5:30 AM	6:03 AM
	4:20 AM	4:40 AM	5:30 AM	6:10 AM	6:26 AM	6:58 AM
			5:30 AM*			6:41 AM*
7:10 AM	7:27 AM	7:53 AM	8:43 AM	9:23 AM	9:36 AM	9:59 AM
10:10 AM	10:28 AM	10:52 AM	11:39 AM	12:19 PM	12:33 PM	12:56 PM
11:00 AM	11:18 AM	11:42 AM	12:25 PM	1:05 PM	1:19 PM	1:45 PM
1:10 PM	1:28 PM	1:52 PM	2:35 PM	3:11 PM	3:25 PM	3:51 PM
2:00 PM	2:18 PM	2:42 PM	3:32 PM	4:12 PM	4:26 PM	4:49 PM
4:00 PM	4:25 PM	4:53 PM	5:47 PM	6:29 PM	6:47 PM	7:17 PM
5:05 PM	5:26 PM	5:51 PM	6:36 PM	7:12 PM	7:25 PM	7:48 PM
	5:20 PM**		6:30 PM**		7:25 PM	7:48 PM
7:30 PM	7:48 PM	8:12 PM	8:47 PM	9:23 PM	9:36 PM	9:59 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.
*Express - These routes have limited stops service. Check Transit App for limited stop locations.
**Express - This loop is only available weekdays.

ROUTE 20

CAT OPS	Santa Barb GG Pkwy	GG Com	Physical Reg Pine Ridge	Naples Blvd Airport Rd	Good-Frank Pine Ridge	Naples Blvd Hollywood Dr	Pine Ridge Whipoor Ln	GG Com	CAT OPS
5:50 AM	5:57 AM	6:08 AM	6:19 AM	6:30 AM	6:40 AM	6:49 AM	6:56 AM	7:06 AM	7:17 AM
7:25 AM	7:32 AM	7:43 AM	7:54 AM	8:05 AM	8:15 AM	8:24 AM	8:31 AM	8:41 AM	8:52 AM
9:00 AM	9:07 AM	9:18 AM	9:29 AM	9:40 AM	9:50 AM	9:59 AM	10:06 AM	10:16 AM	10:27 AM
10:30 AM	10:37 AM	10:48 AM	10:59 AM	11:10 AM	11:20 AM	11:29 AM	11:36 AM	11:46 AM	11:57 AM
1:40 PM	1:47 PM	1:58 PM	2:09 PM	2:20 PM	2:30 PM	2:39 PM	2:46 PM	2:56 PM	3:07 PM
3:20 PM	3:27 PM	3:38 PM	3:49 PM	4:00 PM	4:10 PM	4:22 PM	4:32 PM	4:42 PM	4:53 PM
5:10 PM	5:17 PM	5:28 PM	5:39 PM	5:50 PM	6:00 PM	6:12 PM	6:22 PM	6:32 PM	6:43 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.

ROUTE 21

Davis Sup Walmart	US 41 Sup Walmart	951 Manatee Rd	951 E Elkcam	Marriott	951 Winterb Dr	Marriott	951 E Elkcam	951 Manatee Rd	US 41 Sup Walmart	Davis Sup Walmart
5:50 AM	6:04 AM	6:09 AM	6:19 AM	6:27 AM	6:35 AM	6:38 AM	6:46 AM	6:58 AM	7:02 AM	7:17 AM
7:25 AM	7:42 AM	7:47 AM	7:57 AM	8:05 AM	8:13 AM	8:16 AM	8:24 AM	8:36 AM	8:40 AM	8:55 AM
	3:00 PM	3:05 PM	3:15 PM	3:23 PM	3:31 PM	3:34 PM	3:42 PM	3:54 PM	3:58 PM	

										CAT OPS
5:30 PM	5:44 PM	5:49 PM	5:59 PM	6:07 PM	6:15 PM	6:18 PM	6:26 PM	6:38 PM	6:42 PM	6:57 PM	7:02 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.

ROUTE 22

						Immokalee Dr Marianna Way	Casino
						5:10 AM	5:20 AM
Health Department	Marrion Feather	Miraham Drive	Roberts Center	Hope Circle Willie M Harper	Immokalee South Park CC	Farm Worker Way	Health Department
7:00 AM	7:08 AM	7:18 AM	7:34 AM	7:45 AM	7:56 AM	8:04 AM	8:13 AM
8:25 AM	8:33 AM	8:43 AM	8:59 AM	9:10 AM	9:21 AM	9:29 AM	9:38 AM
9:50 AM	9:58 AM	10:08 AM	10:24 AM	10:35 AM	10:46 AM	10:54 AM	11:03 AM
11:15 AM	11:23 AM	11:33 AM	11:49 AM	12:00 PM	12:11 PM	12:19 PM	12:28 PM
12:40 PM	12:48 PM	12:58 PM	1:14 PM	1:25 PM	1:36 PM	1:44 PM	1:53 PM
2:05 PM	2:13 PM	2:23 PM	2:39 PM	2:50 PM	3:01 PM	3:09 PM	3:18 PM
3:30 PM	3:38 PM	3:48 PM	4:04 PM	4:15 PM	4:26 PM	4:34 PM	4:43 PM
4:55 PM	5:03 PM	5:13 PM	5:29 PM	5:40 PM	5:51 PM	5:59 PM	6:08 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.

ROUTE 23

Health Dept	Farm Worker Way	Immokalee South Park CC	Hope Circle	Roberts Center	Miraham Drive	Marrion Feather	Health Dept
7:30 AM	7:39 AM	7:47 AM	7:58 AM	8:09 AM	8:25 AM	8:35 AM	8:43 AM
8:55 AM	9:04 AM	9:12 AM	9:23 AM	9:34 AM	9:50 AM	10:00 AM	10:08 AM
10:20 AM	10:29 AM	10:37 AM	10:48 AM	10:59 AM	11:15 AM	11:25 AM	11:33 AM
11:45 AM	11:54 AM	12:02 PM	12:13 PM	12:24 PM	12:40 PM	12:50 PM	12:58 PM
1:10 PM	1:19 PM	1:27 PM	1:38 PM	1:49 PM	2:05 PM	2:15 PM	2:23 PM
2:35 PM	2:44 PM	2:52 PM	3:03 PM	3:14 PM	3:30 PM	3:40 PM	3:48 PM
4:00 PM	4:09 PM	4:17 PM	4:28 PM	4:39 PM	4:55 PM	5:05 PM	5:13 PM
5:25 PM	5:34 PM	5:42 PM	5:53 PM	6:04 PM	6:20 PM	6:30 PM	6:38 PM

No Sunday service. / No servicio los domingos.

ROUTE 24

Gov't Center	Floridian Ave John St	Super Walmart	US 41 Charlee Est	Sunny Grove	Super Walmart	Floridan Ave Hardee St	Gov't Center
6:00 AM	6:12 AM	6:24 AM	6:30 AM	6:34 AM	6:51 AM	7:05 AM	7:19 AM
7:00 AM	7:12 AM	7:26 AM				7:38 AM	7:52 AM
7:30 AM	7:42 AM	7:55 AM				8:07 AM	8:21 AM
8:00 AM	8:12 AM	8:26 AM	8:33 AM	8:38 AM	8:55 AM	9:10 AM	9:25 AM
8:30 AM	8:42 AM	8:55 AM				9:07 AM	9:21 AM
9:30 AM	9:42 AM	9:55 AM				10:07 AM	10:21 AM
10:30 AM	10:42 AM	10:55 AM	11:01 AM	11:05 AM	11:22 AM	11:36 AM	11:50 AM
12:00 PM	12:13 PM	12:27 PM				12:40 PM	12:54 PM
1:10 PM	1:23 PM	1:37 PM				1:50 PM	2:04 PM
2:15 PM	2:28 PM	2:42 PM				2:55 PM	3:09 PM
3:20 PM	3:32 PM	3:44 PM	3:50 PM	3:54 PM	4:11 PM	4:25 PM	4:39 PM
4:25 PM	4:38 PM	4:57 PM				5:10 PM	5:24 PM
4:50 PM	5:03 PM	5:17 PM	5:23 PM	5:27 PM	5:44 PM	5:58 PM	6:12 PM
5:35 PM	5:48 PM	6:07 PM				6:20 PM	6:34 PM
6:20 PM	6:33 PM	6:47 PM				7:00 PM	7:14 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.
Times listed in RED are for a 2nd bus on the route only on weekdays / Las horas en ROJO son de un segundo autobús en la ruta solo entre semana

ROUTE 25

Super Walmart	GG Pkwy 951	GG Comm Ctr	GG Pkwy 68th	US 41 GG Pkwy	Good-Frank Pine Rid Rd	Coastland Mall	GG Pkwy 68th	GG Pkwy 951	Super Walmart
4:20 AM	4:26 AM	4:34 AM	4:40 AM	4:50 AM	5:00 AM	5:17 AM	5:24 AM	5:30 AM	5:36 AM
5:50 AM	5:58 AM	6:08 AM	6:14 AM	6:25 AM	6:40 AM	6:58 AM	7:06 AM	7:13 AM	7:20 AM
7:30 AM	7:36 AM	7:44 AM	7:50 AM	8:00 AM	8:15 AM	8:33 AM	8:41 AM	8:48 AM	8:55 AM
9:00 AM	9:08 AM	9:17 AM	9:23 AM	9:33 AM	9:48 AM	10:06 AM	10:14 AM	10:21 AM	10:28 AM
10:35 AM	10:43 AM	10:52 AM	10:59 AM	11:09 AM	11:21 AM	11:39 AM	11:47 AM	11:54 AM	12:01 PM
1:40 PM	1:48 PM	1:57 PM	2:04 PM	2:14 PM	2:29 PM	2:47 PM	2:55 PM	3:04 PM	3:11 PM
3:20 PM	3:28 PM	3:37 PM	3:45 PM	3:56 PM	4:11 PM	4:29 PM	4:39 PM	4:49 PM	4:56 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.

ROUTE 27

GG Comm Ctr	GG Pkwy 951	951 Tree Farm Rd	Park & Ride	Creekside LinC Conn	951 Immokalee Rd	951 Green Blvd	951 GG Pkwy	GG Comm Ctr
6:00 AM	6:06 AM	6:16 AM	6:28 AM	6:41 AM	6:57 AM	7:08 AM	7:15 AM	7:19 AM
7:30 AM	7:36 AM	7:46 AM		8:16 AM	8:33 AM	8:44 AM	8:51 AM	8:55 AM
9:10 AM	9:16 AM	9:26 AM		9:51 AM	10:11 AM	10:22 AM	10:29 AM	10:33 AM
10:45 AM	10:51 AM	11:04 AM		11:29 AM	11:54 AM	12:05 PM	12:12 PM	12:16 PM
12:30 PM	12:36 PM	12:49 PM		1:19 PM	1:44 PM	1:55 PM	2:02 PM	2:06 PM
2:20 PM	2:26 PM	2:39 PM		3:09 PM	3:34 PM	3:45 PM	3:52 PM	3:56 PM
4:05 PM	4:13 PM	4:33 PM		5:03 PM	5:28 PM	5:39 PM	5:46 PM	5:50 PM
6:00 PM	6:06 PM	6:26 PM	6:41 PM	6:57 PM	7:14 PM	7:25 PM	7:32 PM	7:36 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.

ROUTE 121

N 19th St Lake Trafford Rd	E Eustis Ave S 1st St	951 Manatee Rd	951 E Elkham Circle	Marriott	951 Winterberry
5:40 AM	5:53 AM	7:04 AM	7:12 AM	7:20 AM	7:27 AM

951 Winterberry	Marriott	951 Bald Eagle Dr	951 Manatee Rd	Walmart	N 19th St Lake Trafford Rd
4:58 PM	5:10 PM	5:18 PM	5:33 PM	5:38 PM	6:40 PM

Sunday times are highlighted above. / Horario de domingos esta destacados arriba.



SCAN CODE FOR INDIVIDUAL ROUTE SCHEDULES

THE PURRRFECT RIDE

ALL COLLIER AREA TRANSIT ROUTES

To Immokalee

To Immokalee

To Naples

To Marco Island

City of Naples

Immokalee

Marco Island

LEGEND/LEYENDA

- 11 **Red Route/Ruta Roja** | US 41 - Creekside
- 12 **Gold Route/Ruta Oro** | Airport - Creekside
- 13 **Orange Route/Ruta Naranja** | NCH - Coastland Mall
- 14 **Teal Route/Ruta Verde Azulado** | Bayshore - Coastland Mall
- 15 **Purple Route/Ruta Morada** | Golden Gate City
- 16 **Gray Route/Ruta Gris** | Golden Gate City
- 17 **Green Route/Ruta Verde** | Rattlesnake - FSW
- 19 **Blue Route/Ruta Azul** | Golden Gate Estates - Immokalee
- 20 **Magenta Route/Ruta Magenta** | Pine Ridge
- 21 **Light Blue Route/Ruta Azul Claro** | Marco Island Circulator
- 121 **Silver Route/Ruta Plateada** | Express Immokalee - Marco Island
- 22 **Pink Route/Ruta Rosa** | Immokalee Circulator
- 23 **Burgundy Route/Ruta Marrón** | Immokalee Circulator
- 24 **Brown Route/Ruta Carmelita** | US 41 East - Charlee Estates
- 25 **Lime Green Route/Ruta Verde Limon** | GG Parkway - US 41
- 27 **Lavender Route/Ruta Lavanda** | 951 - Immokalee Rd

SYMBOLS / SÍMBOLOS

- Transfer Station / Estación de transferencia
- School / Escuela
- Botanical Garden / Jardín Botánico
- Museum / Museo
- Hospital / Hospital
- Airport / Aeropuerto
- Libary / Biblioteca
- Park / Parque
- Lee / Collier Transfer / Lee/Collier Punto de Transferencia
- Park & Ride / Parqueo y Paseo
- Zoo / Zoo

Scan to download the **FREE Transit app** for detailed maps and real-time updates

rideCAT
COLLIER AREA TRANSIT
8300 Radio Road • Naples, Florida 34104
(239) 252-7777
www.rideCAT.com

MINUTES OF THE PUBLIC TRANSIT ADVISORY COMMITTEE MEETING

NAPLES, FLORIDA

SEPTEMBER 18, 2024

LET IT BE REMEMBERED, the Public Transit Advisory Committee in and for the County of Collier, having conducted business herein, met on this date at 1:00 P.M. in REGULAR SESSION at Collier County Museum Lecture Hall, 3331 Tamiami Trail E, Naples, Florida with the following members present:

Chair:	John DiMarco, III
Vice-Chair:	Peter Berry
	Cliff Donenfeld
	Dewey Enderle
	Sonja Lee Samek (Excused)
	Benita Staadecker
	Open Seat

ALSO PRESENT: Brian Wells, Director, Collier County PTNE
Omar DeLeon, Public Transit Manager, Collier County PTNE
Alexander Showalter, Senior Planner, Collier County PTNE
Keyla Castro, Operations Support Specialist, Collier County PTNE
Rosio Garcia, Operations Analyst, Collier County PTNE
Marika Maldonedo, Paratransit Manager, Collier County PTNE
Samantha Markham, Project Manager, Stantec
Elena-Ortiz Rosado, Marketing Manager, Collier County PTNE
Corene Sanger, Management Analyst, Collier County PTNE
Liz Soriano, Project Manager, Collier County PTNE
Jacob Stauffer, Transit Planner, MV Transportation
Mark Talaga, Collier Area Transit IT Manager, Collier County PTNE
Nolan Begley, Fixed Route Manager, MV Transportation

1. **Call to Order**
   Chair DiMarco called the meeting to order at 1:00 P.M.

2. **Roll Call**
   Roll call was taken, and a quorum of five was established.

3. **Approval of Agenda**
   Vice Chair Berry moved to approve the Agenda as presented. Second by Ms. Staadecker. Carried unanimously 5 - 0.

4. **Approval of Minutes**
   Ms. Staadecker moved to approve the minutes of the August 21, 2024, Public Transit Advisory Committee meetings as amended:
   Add: Also Present – Dusty Siegler, Senior Planner, Collier County MPO.
   Second by Vice Chair Berry. Carried unanimously 5 - 0.

5. **Committee Action**
   a. **None**

6. **Reports and Presentations**
   a. **Marco Trolley Update**
   Mr. Showalter presented the Executive Summary "*Marco Island Trolley Pilot*" to update the Committee on the status of the proposed Marco Island Trolley route.
   He noted:
   - Collier Area Transit (CAT), in conjunction with the City of Marco Island, is considering the introduction of a trolley route to the island with two buses circulating daily on an approximate twenty-minute frequency.
   - Conversations with Rich Blonna, Marco Island Councilman, and representatives of the business community resulted in a three-month pilot program.
   - The program is designed to reduce traffic congestion on the island and will commence in January 2025.
   - The route spans from the Rose Marina on the north side of the island, to Caxambas Park on the south side of the island, travelling along Collier Boulevard. The vehicles would stop at Veterans Community Park and existing beach access points along the way.
   - The service, at no cost to the rider, will run from 9 AM to 9 PM.
   - At the September 9, 2024, Marco Island City Council meeting, members voted 4 – 3 in favor of the program.

   Committee Discussion
   Ms. Staadecker reported:
   - As an attendee at the council meeting, she voiced support for the trolley service, citing alleviation of traffic congestion as a benefit to residents.
   - Many attendees voiced opposition to the trolley program.
   - She suggested a town hall style meeting with Rich Blonna prior to the September 25th budget meeting would be advantageous.

Mr. DeLeon reported:

- PTAC intends to work closely with the Marco Island City Council to market the project and its benefits.
- Ideas and/or methods of working with the group and providing project information are welcome.
- Mr. Wells will work with Councilor Blonna on a Memorandum of Understanding for the Program (MOA).

b. Major Transit Development Plan (TDP) Update

Mr. Showalter reported that the TDP process, which identifies recommendations and implementation strategies to achieve the goals and objectives of Collier Area Transit, is a work in progress. He apprised the Committee of the status noting:

- To receive State Block Grant Funds for system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five (5) years.
- The TDP is a ten (10) year plan for transit needs, cost and revenue projections, community transit goals, objectives and policies and serves as an operational guidance document.
- The major update is developed in coordination with the Metropolitan Planning Organizations (MPO) long range transportation plan.
- Collier Area Transit staff have been working with the Consulting Team of Stantec and MPO Staff to update the plan.
- The consultant has produced the Public Involvement Plan, consistent updates to each section of the TDP and identified new peers for comparison of transit systems.
- MPO and CAT comments have been incorporated into the documents.
- Three updated tech and stakeholder memos were distributed to the Committee for review.

If members of the Committee have any comments or questions on the update they should contact Mr. Showalter.

c. CAT Technology Update

Mr. Talaga provided an update to the Committee on technology enhancements, ongoing and completed, noting:

Equans CAD/AVL Deployment

Fixed route operation system replacement upgrades include:

- New HDTS (high-definition video recording) on board.
- Upgraded APC sensors (passenger count system).
- New on-board infotainment screens.
- On bus integration for route scheduling.
- Traffic signal priority system integration.

Vice Chair Berry left the meeting at 1:22 PM. A quorum of four was present.

Data Transformation and Integration

The new Transit App was deployed to improve efficiency for riders including pass purchases, tracking routes, etc.

Committee discussion:

- The current app will be updated automatically if the rider has downloaded the appropriate settings on their phone.
- QR codes are available on signage to assist riders with transit information.
- Data transformation is run nightly.

EVIR Mobile Deployment

- An emergency vehicle integration response system was deployed to improve safety and response times by using technology to alert drivers and coordinate between fire and EMS vehicles and command centers.

Inspection Builder

- Zonar Systems for fleetwide diagnostics are being utilized.
- Repair costs are reasonable.

Fare Box

- A reliable, user-friendly Fare Box is being researched for installation on the buses.

New Projects

New projects on the ParaTransit side are in progress including upgraded Wi-Fi systems and new tablets.

Data Warehouse

A system that stores and organizes data from multiple sources for reporting, analysis, and business intelligence coordinating data access from all vendors has been adopted.

7. **Member and Staff Comments**
   None

8. **Public Comments**
   None

9. **Next Meeting Date**

October 16, 2024 - 1:00 P.M.
Collier County Museum Lecture Hall
3331 Tamiami Trail E
Naples, FL. 34104

10. **Adjournment**
    There being no further business for the good of the County, the meeting was adjourned by the chair at 1:42 P.M.

Public Transit Advisory Committee

John DiMarco III, Chair

These minutes approved by the Board/Committee on November 20, 2024 as presented X or as amended _____.

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierGov
facebook.com/CollierGov
youtube.com/CollierGov

January 10, 2025

FOR IMMEDIATE RELEASE

Notice of Hybrid Remote Public Meeting
Public Transit Advisory Committee (PTAC)
Collier County, Florida

January 15, 2025
1:00 p.m.

Notice is hereby given that the **Public Transit Advisory Committee (PTAC)** will meet on **Wednesday, January 15,** at **1:00 p.m**. This will be a Hybrid Remote meeting and it will be held at the Collier County Museum, Lecture Hall, 3331 Tamiami Trail East, Naples, Florida. The public may attend either remotely or in person.

Individuals who would like to participate remotely should contact Alexander Showalter at Alexander.Showalter@colliercountyfl.gov or call (239) 252-5849 by **noon on January 15**.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

The agenda will be available on the Collier County Government website at https://www.ridecat.com/inside-cat/ptac/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Alexander Showalter at (239) 252-5849.

Public Transit Advisory Committee
Collier Area Transit
Hybrid Meeting
Collier County Museum Lecture Hall
3331 Tamiami Trail East Naples, Florida
January 15th, 2025
1:00 p.m.

Agenda Packet

1) Call to Order
2) Roll Call
3) Approval of Agenda
4) Approval of Minutes
    a. November 20, 2024
5) Committee Action
6) Reports and Presentations
    a. Update on Transit Development Plan (TDP) Process
    b. Zero Emissions Plan Update
7) Member Comments
8) Public Comments
9) Next Meeting Date – February 19th, 2025, Collier County Museum Lecture Hall
10) Adjournment

Two or more members of the Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future BCC meeting.

Collier Area Transit operates in compliance with Federal Transit Administration, (FTA) program requirements and ensures that transit services are made available and equitably distributed and provides equal access and mobility to any person without regard to race, color, or national origin, disability, gender or age. Title VI of the *Civil Rights Act of 1964*; FTA Circular 4702.1A, "Title VI and Title VI Dependent Guidelines for Federal Transit Administration Recipients.

Anyone who required an auxiliary aid or service for effective communication, or other reasonable accommodations in order to participate in this proceeding, should contact the Collier County Facilities Management Department located at 3335 Tamiami Trail East, Naples, Florida 34112 or 239-252-8380 as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

MINUTES OF THE PUBLIC TRANSIT ADVISORY COMMITTEE MEETING

NAPLES, FLORIDA

NOVEMBER 20, 2024

LET IT BE REMEMBERED, the Public Transit Advisory Committee in and for the County of Collier, having conducted business herein, met on this date at 1:00 P.M. in REGULAR SESSION at Collier County Museum Lecture Hall, 3331 Tamiami Trail E, Naples, Florida with the following members present:

Chair:	John DiMarco, III
Vice Chair:	Peter Berry
	Cliff Donenfeld
	Dewey Enderle
	Sonja Lee Samek
	Benita Staadecker
	Open Seat

ALSO PRESENT: Brian Wells, Director, Collier County PTNE
Omar DeLeon, Public Transit Manager, Collier County PTNE
Alexander Showalter, Senior Planner, Collier County PTNE
Keyla Castro, Operations Support Specialist, Collier County PTNE
Rosio Garcia, Operations Analyst, Collier County PTNE
Marika Maldonado, Paratransit Manager, Collier County PTNE
Elena-Ortiz Rosado, Marketing Manager, Collier County PTNE
Corene Sanger, Management Analyst, Collier County PTNE
Liz Soriano, Project Manager, Collier County PTNE
Jacob Stauffer, Transit Planner, MV Transportation
Nolan Begley, Fixed Route Manager, MV Transportation

1. **Call to Order**
   Chair DiMarco called the meeting to order at 1:00 P.M.

2. **Roll Call**
   Roll call was taken, and a quorum of four was established.

3. **Approval of Agenda**
   Ms. Staadecker moved to approve the Agenda as presented. Second by Vice Chair Berry. Carried unanimously 4 - 0.

4. **Approval of Minutes**
   Mr. Enderle moved to approve the minutes of the September 18, 2024, Public Transit Advisory Committee meeting. Second by Vice Chair Berry. Carried unanimously 5 - 0.

Ms. Samek and Mr. Donenfeld joined the meeting at 1:04 P.M. A quorum of six was present.

5. **Committee Action**
   a. **Grant Applications for 5310, 5311, and 5339**
   Mr. DeLeon presented the Executive Summary *"Grant Application for 5310, 5311, and 5339"* for the submission of the FY25 Capital/Operating Grants Program applications to the Florida Department of Transportation (FDOT). The Board of County Commissioners (BCC) must approve the grant application submissions. He noted:

FTA Section 5310 Grant Request
The 5310 capital and operating grant requests in FY25 supports the Collier Area Transit (CAT) System to purchase replacement vehicles and operating expenses to support the paratransit service.

- Funding in the amount of $625,766 will be used to purchase four replacement paratransit vehicles and equipment that have met their useful life.
- Another $800,000 requested will be utilized to provide paratransit services in the urbanized areas. Funding allocated, which requires a 50% local match, would be $400,000 in Federal funds and $400,000 in Local funds.
- The capital grant includes Federal Funding ($900,613), a State Match of ($62,577) and a Local Match of ($462,577) for a total of $1,425,766.
- Replacement vehicles will not increase the overall paratransit fleet inventory.
- The acquisition will provide for ongoing transportation services to the elderly and disabled residents of the County.

FTA Section 5311 Grant Request
The 5311 capital grant request in FY24 supports the Collier Area Transit (CAT) System to offset operational costs to support fixed route service in the rural areas.

- Rural capital grant funding in the amount of $1,444,000 will be used to offset operational costs to support fixed route service in the rural areas.
- The capital grant includes a 50% Federal Share ($722,000), and a 50% Local Match ($722,000).

FTA Section 5339 Grant Request

The 5339 capital grant request in FY24 supports the Collier Area Transit (CAT) System to purchase a replacement vehicle to support fixed route service and construction of four bus stop improvements in rural areas.

- Funding in the amount of $852,079 will be used to purchase one forty-foot fixed route bus to replace a bus that has met its useful life.
- Additionally, funding in the amount of $284,071 will be used for the purchase and construction of bus stop improvements including shelters.
- The capital grant funding match requirements include an 80% Federal share ($924,481) with a 20% State Match ($231,120) for a total grant funding request of $1,155,602.

Mr. DeLeon noted:

- Grant funds, awarded to FDOT by the Federal Transit Administration (FTA), are utilized annually by the Program.
- Rural area boundaries, determined by PTAC, rely on census data. FDOT recently approved the boundaries.
- Collier County is not in competition with other entities for rural Grants 5311 and 5339.
- "Elderly Eligibility Criteria" would be defined if introduced as a criterion for Grant distribution.

Vice-Chair Berry motioned to endorse the submittal of Grant Applications 5310, 5311 Rural, and 5339 Rural in the amount of $4,025,368.00 to the Board of County Commissioners (BCC) for approval and submission to the Florida Department of Transportation (FDOT). Seconded by Ms. Staadecker. Carried unanimously 6 – 0.

6. Reports and Presentations

a. Seasonal Schedule Change 2024

Mr. Stauffer presented the Executive Summary "*November Route Changes"* updating the Committee on the service modifications to be implemented for the season schedule change on November 17, 2024. He noted:

- Changes will be implemented across multiple Collier Area Transit routes.
- Public notification in advance of the changes included distribution of the proposed schedule modifications throughout the community and postings on social media and RideCAT.com.
- Many changes are driven by an effort to improve the On-Time Performance of CAT's fixed route service.
- Data collected over the past two years includes "run times" and driver feedback, resulting in adjustment to the timepoints to provide riders a more accurate estimation of bus arrival at the stops.
- Significant route changes related to Route 19 and Route 22.
- Route 22 had its morning outbound trip from the Government Center to Immokalee, as well as the evening inbound trip from Immokalee to CAT Ops, removed.
- The Route 19 Express will be out of service on the way to Immokalee to service the Route 22 segment before starting service as Route 19.
- Changes will be available for public review online and on social media.

Mr. Stauffer noted:
Facebook Survey

- Statistical data will be reported when available.

Paratransit Bus Schedule
A member reported wait time experienced for passenger pick-up was occasionally unreasonable and efforts to contact dispatch were unsuccessful.

Mr. Stauffer noted:

- Eligibility requirements must be met to book special trips.
- A "window time and" is provided to the passenger for pick up as is ride time.
- Dispatch should be notified if the passenger is ready ahead of the scheduled pick up. accommodation will be made if possible.
- The dispatch number (239.262.7272) offers a recorded option menu.

Mr. Stauffer *will investigate the functionality of the dispatch number and provide an update at the December 18, 2024 meeting.*

7. Member and Staff Comments
Marco Island Trolley Pilot Program
Mr. Showalter reported:

- Two new members were elected to the Marco Island City Council.
- The Council members voted against the trolley route pilot program to the island.
- The program, scheduled to commence in January 2025, was designed to reduce traffic congestion on the island.

8. Public Comments
None

9. Next Meeting Date December 18, 2024 - 1:00 P.M.
Collier County Museum Lecture Hall
3331 Tamiami Trail E
Naples, FL. 34104

10. Adjournment
There being no further business for the good of the County, the meeting was adjourned by the chair at 1:30 P.M.

Public Transit Advisory Committee

_____
John DiMarco III, Chair

These minutes approved by the Board/Committee on _____,2024 as presented_____ or as amended _____.

EXECUTIVE SUMMARY
Reports and Presentations
Item 6a
Update on Transit Development Plan (TDP) Process

Objective:

To provide an update on the Transit Development Plan (TDP) Process.

Considerations:

To receive State Block Grant Funds for transit system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five years. The TDP is a 10-year plan for transit needs, cost and revenue projections, and community transit goals, objectives, and policies. The TDP serves as Collier Area Transit's planning, development, and operational guidance document, and the major update is developed in coordination with the MPO's Long-Range Transportation Plan.

CAT Staff has been working with the Consulting Team of Stantec and MPO Staff to update the plan. The consultant has made steady progress on the update by producing the Public Involvement Plan, consistent updates to each section of the TDP, as well as identifying new peers for comparison of transit systems. CAT and the MPO Staff have been providing comments and feedback on these working documents produced so far and ask the PTAC for any further input.

As MPO and CAT comments have been incorporated into the documents, we would like to provide updates on the progress of the report for discussion and receive any further comments from the committee.

Recommendation:

Review and provide feedback regarding updates to the CAT Major TDP.

Attachments:

1. TDP Situational Appraisal Final Report

Prepared by: _____ Date: 12/13/24
Alexander Showalter, Planner II

Approved by: _____ Date: 12/13/2024
Brian Wells, PTNE Division Director

Situational Appraisal
Technical Memo No. 1

Date: **December 3, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: **Situational Appraisal – Technical Memo No. 1**

The Situational Appraisal has been updated. Please review.

Prepared for:
Collier MPO

Prepared by:
Stantec

Project Number:
215811425

Table of Contents

1 BASELINE CONDITIONS, DEMAND ESTIMATION & LAND USE DEVELOPMENT ASSESSMENT 5
1.1 Study Area 6
1.2 Population Profile 7
1.3 Demographic Characteristics 15
1.4 Transportation Disadvantaged Population 19
1.4.1 Recent Improvements to Paratransit Services 21
1.5 Labor and Employment Characteristics 21
1.6 Educational Attainment 26
1.7 Tourism 27
1.8 Major Trip Generators 29
1.9 Major Developments 32
1.10 Existing and Future Land Use 33
1.11 Commuter Travel Patterns 36
1.12 Roadway Conditions 37

2 TRANSIT PERFORMANCE 39
2.1 Existing Transit Services 39
2.1.1 Fixed Route Services 39
2.1.2 Paratransit Services 42
2.1.3 Technology Solutions 43
2.1.4 Fare Structure 44
2.1.5 Transit Facilities 44
2.1.6 Vehicle Inventory 47
2.1.7 Safety 48
2.2 Other Transportation Service Providers 48
2.3 Comprehensive Operations Analysis 2021 - Recap 50
2.4 Transit Usage 51
2.4.1 Route Ridership by Month 51
2.4.2 Farebox Recovery 55
2.5 Trend and Peer Comparison Analysis 57
2.5.1 Peer Selection 58
2.5.2 Normalizing Data 60
2.5.3 Performance Measures 60
2.5.4 Effectiveness Measures 65
2.5.5 Efficiency Measures 67
2.5.6 Key Findings 71

3 ON-BOARD SURVEYS 73
3.1 Survey Characteristics 73
3.2 Passenger Demographic Information 74
3.3 Passenger Travel Behavior and Characteristics 74
3.4 Passenger Satisfaction 76

APPENDIX A – PEER SELECTION METHODOLOGY 78
Introduction 78
Initial Peer Group 78
Overview of Methodology 79
Normalizing Cost Data 81
Comparison of Results with Previous TDP 82
Stage 2 Secondary Screening 83
Final Peer Group Selection 83
Characteristics of Peer Systems 85
Primary Review Data Values for All Factors and Potential Peers 89

Primary Review Likeness Scores for All Factors and Potential Peers 91

LIST OF TABLES

Table 1-1: Collier County Demographic Characteristics 16
Table 1-2: Collier County transportation disadvantaged trips served. 19
Table 1-3: Top Employers in Collier County in 2023. 30
Table 1-4: Top Ten Planned Unit Developments in Collier County by Area. 32
Table 1-5: Future Land Use in Collier County. 36
Table 1-6: Journey-to-Work Characteristics. 37
Table 2-1: Existing Fixed-Route Services in Collier County. 40
Table 2-2: Fare Structure in Collier County (2024) 44
Table 2-3: Park-and-ride locations and connections. 46
Table 2-4: CAT Vehicle Inventory 2024 48
Table 2-5: Vanpool performance statistics in Collier County for FY2022, FY2023, and projected FY2024. 49
Table 2-6: Fare Structure in Collier County (2024) 56
Table 2-7: System Performance Review Measures 57
Table 2-8: Transit System Peer Review Selection 58
Table 2-9: Average of Likeness Score Sums by Peer Group 59
Table 3-1: Transit System Peer Review Selection 79
Table 3-2: Average of Likeness Score Sums by Peer Group 82
Table 3-3: Average of Likeness Score Sums by Peer Group. 84

LIST OF FIGURES

Figure 1-1: Map of Study Area. 6
Figure 1-2: Collier population totals, estimates, and projections (Source: US Census Bureau and BEBR). 7
Figure 1-3: Historical and Projected Decennial Population Growth Rates (Source: US Census Bureau). 8
Figure 1-4: Collier County year by year population projections (Source: Collier County Government). 9
Figure 1-5: Collier County Estimated Population Density by TAZs in 2015. 10
Figure 1-6: Collier County Projected Population Density by TAZs in 2050. 11
Figure 1-7: Collier County Population Density Growth per TAZ from 2015 to 2050. 12
Figure 1-8: Collier County Estimated Dwelling Unit Density per TAZ in 2015. 13
Figure 1-9: Collier County Projected Dwelling Unit Density per TAZ in 2050. 14
Figure 1-10: Collier County Dwelling Unit Density Increase by TAZ from 2015 to 2050. 15
Figure 1-11: Household Income Over Time in Collier County 17
Figure 1-12: Population Age Distribution in Collier County 18
Figure 1-13: Distribution of Households with No Vehicle in Collier County in 2022. 19
Figure 1-14: Collier County transportation disadvantaged trips, 2019–2024 (Source: Collier County Community Transportation Coordinator's Annual Operating Reports, Fiscal Years 2019-2024). 20
Figure 1-15: Ratio of TD Trips to Total Population. 21
Figure 1-16: Collier County Estimated Employment Density by TAZs in 2015. 22
Figure 1-17: Collier County Projected Employment Density by TAZs in 2050. 23
Figure 1-18: Collier County Employment Density Growth by TAZs from 2015 to 2050. 24
Figure 1-19: Collier County Labor Force Distribution by Service Area, 2010, 2020, and 2022. 25
Figure 1-20: National, State and County Unemployment 26
Figure 1-21: Educational Attainment in Collier County. 27
Figure 1-22: Transit Access to Point of Interest Destinations in Collier County. 28
Figure 1-23: Density Map of Point of Interest Destinations by TAZ. 29
Figure 1-24: Transit Access to Top Employers in Collier County in 2023. 31
Figure 1-25: Density Map of Top Employer Locations by TAZ. 32
Figure 1-26: Status of Planned Unit Developments in Collier County. 33
Figure 1-27: Existing Land Use Zoning Areas in Collier County. 34
Figure 1-28: Future Land Use Designation in Collier County as of 2024. 35
Figure 1-29: Existing and projected deficiency of Collier County roads (Source: Collier MPO). 38
Figure 1-30: Percent change in peak hour direction volume on major roads in Collier County from 2023 to 2024 (Source: Collier MPO). 39

Figure 2-1: Existing CAT Services 41
Figure 2-2: Paratransit Ridership 42
Figure 2-3: CAT Radio Road Transit Facility (Source: Google Street View) 45
Figure 2-4: Intermodal Transfer Station (Source: Google Street View) 45
Figure 2-5: Map of park-and-ride locations in Collier County with the CAT transit system. 47
Figure 2-6: Station location for private bus service and Park and Ride locations along transit network. 50
Figure 2-7: Total Monthly Ridership in Collier County during FY2023 51
Figure 2-8: Total Passengers per Route in Collier County during FY2023 52
Figure 2-9: Passengers per Revenue Hour in Collier County during FY2023 52
Figure 2-10: Seasonal Variation of Average Monthly Ridership 53
Figure 2-11: Top Ridership Routes in Collier County in FY2023 54
Figure 2-12: Average Monthly Ridership of Top Ridership Routes in Collier County in FY2023 55
Figure 2-13: 5-year trend (left) and 2022 peer comparison (right) charts for unlinked passenger trips. 61
Figure 2-14: 5-year trend (left) and 2022 peer comparison (right) charts for passenger miles travelled. 61
Figure 2-15: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue miles. 62
Figure 2-16: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue hours. 62
Figure 2-17: 5-year trend (left) and 2022 peer comparison (right) for vehicles operating at maximum service. 63
Figure 2-18: 5-year trend (left) and 2022 peer comparison (right) for vehicles available at maximum service. 63
Figure 2-19: 5-year trend (left) and 2022 peer comparison (right) charts for operating expense. 64
Figure 2-20: 5-year trend (left) and 2022 peer comparison (right) charts for fare revenue. 64
Figure 2-21: 5-year trend (left) and 2022 peer comparison (right) for unlinked passenger trips per capita. 65
Figure 2-22: 5-year trend (left) and 2022 peer comparison (right) for passenger miles travelled per capita. 65
Figure 2-23: 5-year trend (left) and 2022 peer comparison (right) for vehicle revenue miles per capita. 66
Figure 2-24: 5-year trend (left) and 2022 peer comparison (right) for unlinked trips per vehicle revenue mile. 66
Figure 2-25: 5-year trend (left) and 2022 peer comparison (right) for unlinked trips per vehicle revenue hour. 67
Figure 2-26: 5-year trend (left) and 2022 peer comparison (right) charts for operating expense per capita. 67
Figure 2-27: 5-year trend (left) and 2022 peer comparison (right) for operating expense per unlinked trip. 68
Figure 2-28: 5-year trend (left) and 2022 peer comparison (right) for operating expense per passenger mile. 68
Figure 2-29: 5-year trend (left) and 2022 peer comparison (right) for operating expense per revenue mile. 69
Figure 2-30: 5-year trend (left) and 2022 peer comparison (right) for operating expense per revenue hour. 69
Figure 2-31: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue mile per vehicle. 70
Figure 2-32: 5-year trend (left) and 2022 peer comparison (right) charts for farebox recovery ratio. 70
Figure 2-33: 5-year trend (left) and 2022 peer comparison (right) charts for average fare. 71
Figure 3-1: Distribution of respondent age from CAT Sticker Survey responses. 74
Figure 3-2: Distribution of respondent gender from CAT Sticker Survey responses. 74
Figure 3-3: Distribution of respondent educational attainment from CAT Sticker Survey responses. 74
Figure 3-4: Distribution of most frequented routes from Baseline CAT survey responses. 74
Figure 3-5: Distribution of trip destinations from Baseline CAT Survey responses. 75
Figure 3-6: Distribution of amount of time riding with CAT from CAT Sticker Survey responses. 75
Figure 3-7: Distribution of method for receiving service alerts from CAT Sticker Survey responses. 75
Figure 3-8: Distribution of satisfaction level with CAT service from CAT Sticker Survey responses. 76
Figure 3-9: Distribution of satisfaction level with CAT service from Baseline CAT Survey responses. 76
Figure 3-10: Distribution of likeliness to recommend CAT from CAT Sticker Survey responses. 76
Figure 3-11: Distribution of likeliness to recommend CAT from Baseline CAT Survey responses. 76

1 Baseline Conditions, Demand Estimation & Land Use Development Assessment

The baseline conditions analysis provides a detailed report on the existing and projected future conditions of the service area. The foundation of the transportation development plan will be based on the contextual information presented in this section. The collected data will also be used in the Situational Appraisal to provide the basis for transit improvement considerations.

The following topics were reviewed and analyzed for Collier County in the context of the TDP:

- Study Area
- Population Profile
- Demographic Characteristics
- Transportation Disadvantaged Population
- Labor and Employment Characteristics
- Educational Attainment
- Tourism
- Major Trip Generators
- Major Developments
- Existing and Future Land Use
- Commuter Travel Patterns
- Roadway Conditions

Data collected for select population, demographic, and socioeconomic characteristics are supported by various maps and tables. Primary data sources include the U.S. Census Bureau, specifically from the 2020 Decennial Census and the 5-Year American Community Survey (ACS), Collier County, Florida Commission for the Transportation Disadvantaged, Collier Area Transit, and the Regional Economic Research Institute at Florida Gulf Coast University, supplemented by local and regional agency sources, as necessary.



1.1 Study Area

Collier County is in southwest Florida, east of the Gulf of Mexico. The county is bordered on the northwest, northeast, east, south, respectively by Lee, Hendry, Broward, Miami-Dade, and Monroe counties. Collier County has three municipalities: Everglades City, Marco Island, and Naples, the County seat.

In terms of geographical area, Collier County is the largest county in Florida with a land area of approximately 1,996.8 square miles according to the 2020 Decennial Census from the US Census Bureau. A significant portion of the county area is designated as protected lands (more than 1,875 square miles), primarily in the eastern and southern parts of the county.

Figure 1-1 shows the extent of the study area. Due to the size of Collier County, a study area has been produced as outlined by the red boundary, which covers the existing transit network along with the core populated areas of the County and excludes some of the park land. For presentation purposes moving forward in this document, some of the map figures will be zoomed to the study area extent to show greater detail and avoid wasted space.

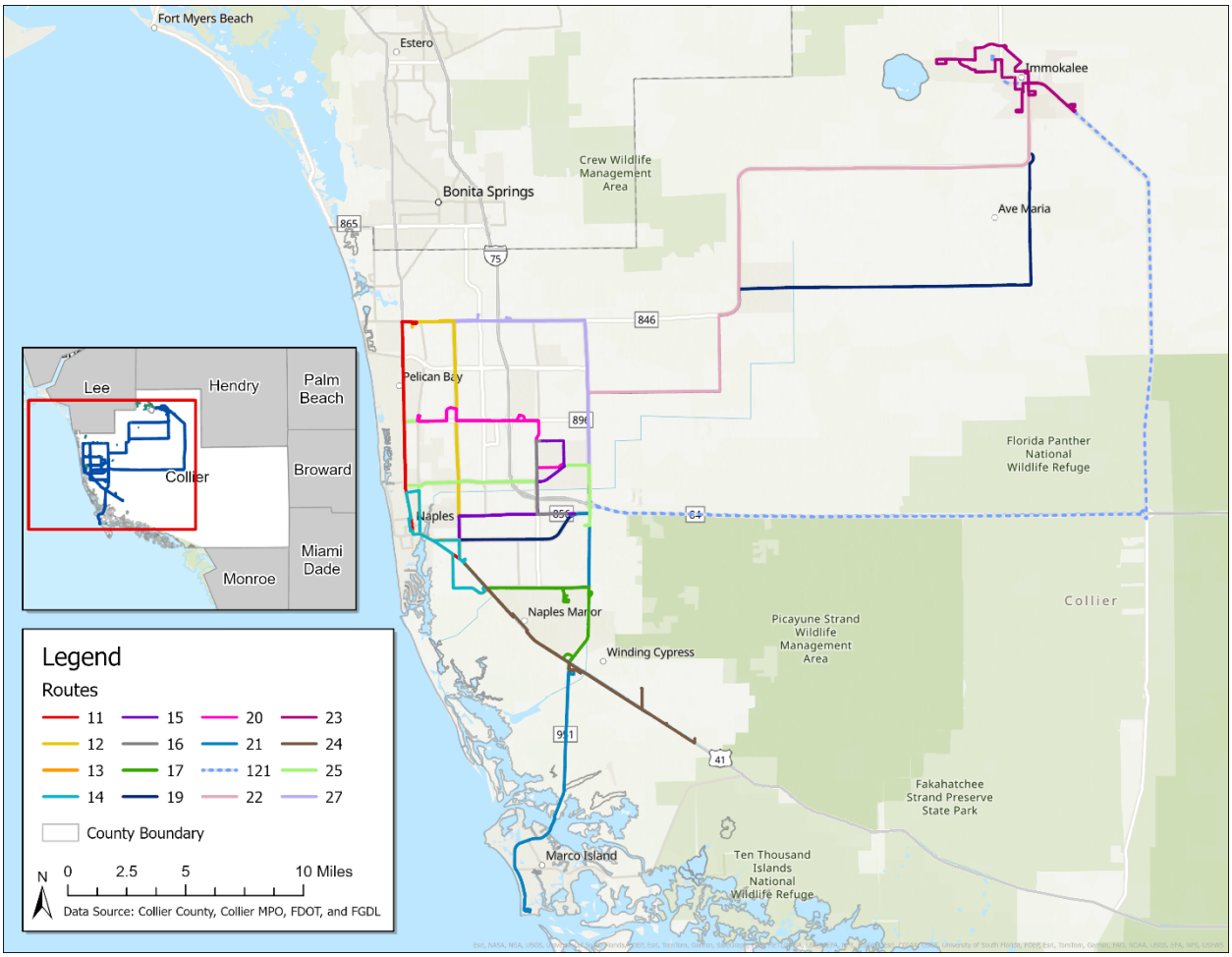


Figure 1-1: Map of Study Area.

1.2 Population Profile

As of the 2020 Decennial Census, Collier County was ranked the 19th most populous county in Florida. As per the US Census Bureau 2020 Decennial Census, the county population accounts for 1.74% of the total state population in 2020 and is estimated to grow to 1.83% by 2050 based on State population projections.

The Collier County population has been steadily increasing over the last few decades, as shown in Figure 1-2 below. Population values were obtained from US Census Bureau decennial censuses and annual population estimates. There was a slight dip in the census population count in 2020 compared to the estimated values for the previous years, likely due to the COVID-19 pandemic. The population projection values were obtained from the Florida Bureau of Economic and Business Research (BEBR) at 5-year intervals until 2050. Collier County's population is projected to continue increasing steadily.

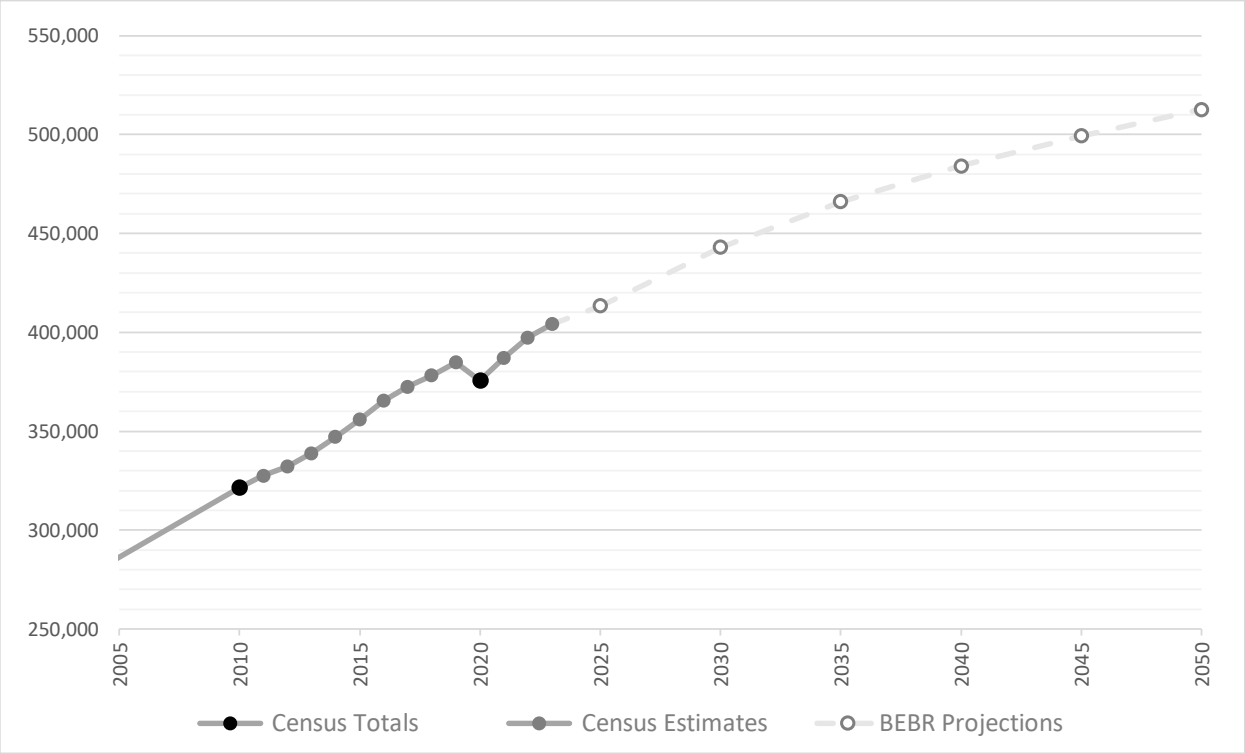


Figure 1-2: Collier population totals, estimates, and projections (Source: US Census Bureau and BEBR).

Collier County's population has been increasing during the past few decades; however, the overall growth rate is expected to slow over the next couple of decades, like state-wide conditions. In general, the county has consistently experienced and will continue to have higher rates of growth compared to that of Florida, as shown in Figure 1-3 below.

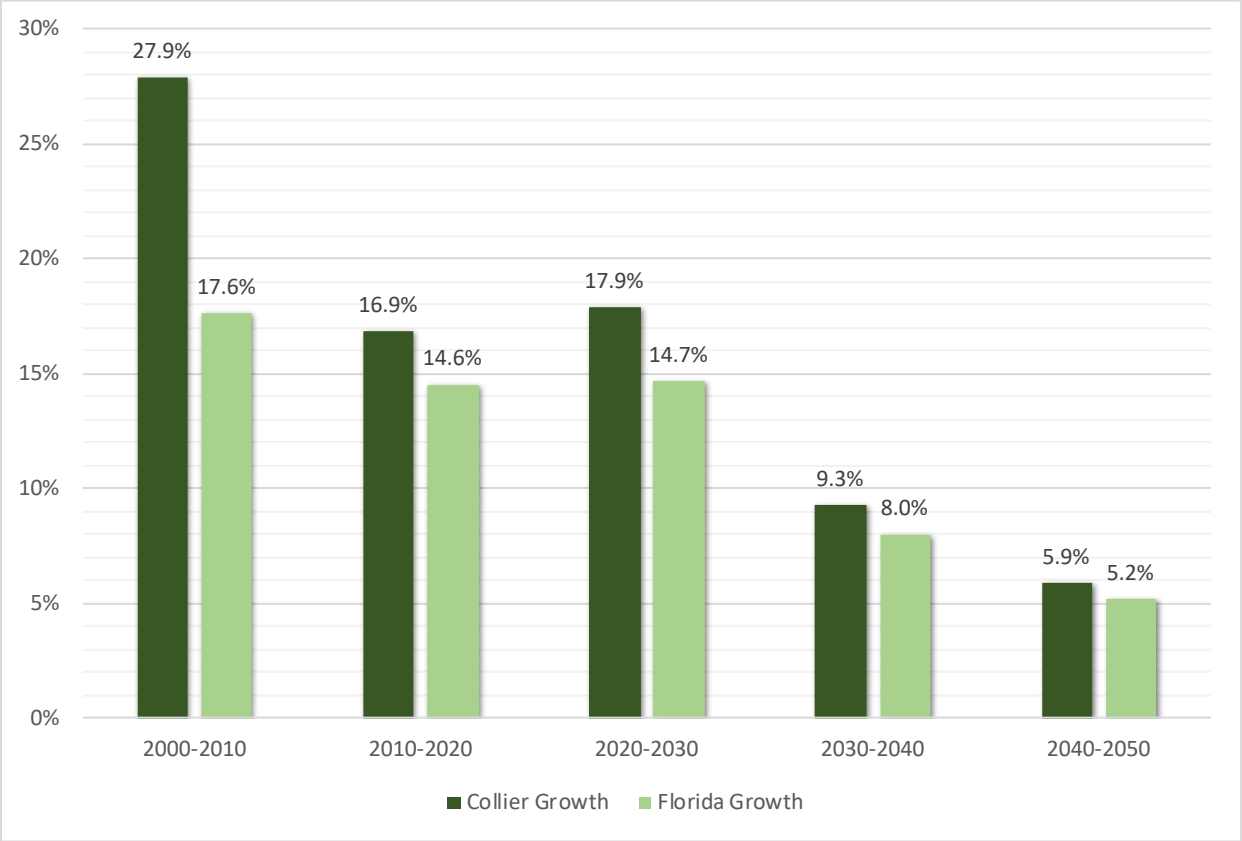


Figure 1-3: Historical and Projected Decennial Population Growth Rates (Source: US Census Bureau).

Collier County typically receives a significant number of tourists and seasonal residents, impacting the travel patterns and increasing traffic congestion during the peak season periods. The County developed annual population projections for the fiscal year and peak season periods to better plan for seasonal demand impact on public services. Figure 1-4 displays these projection values; with annual fiscal year population values reflecting the permanent resident population and peak season population values estimated with a constant adjustment factor.

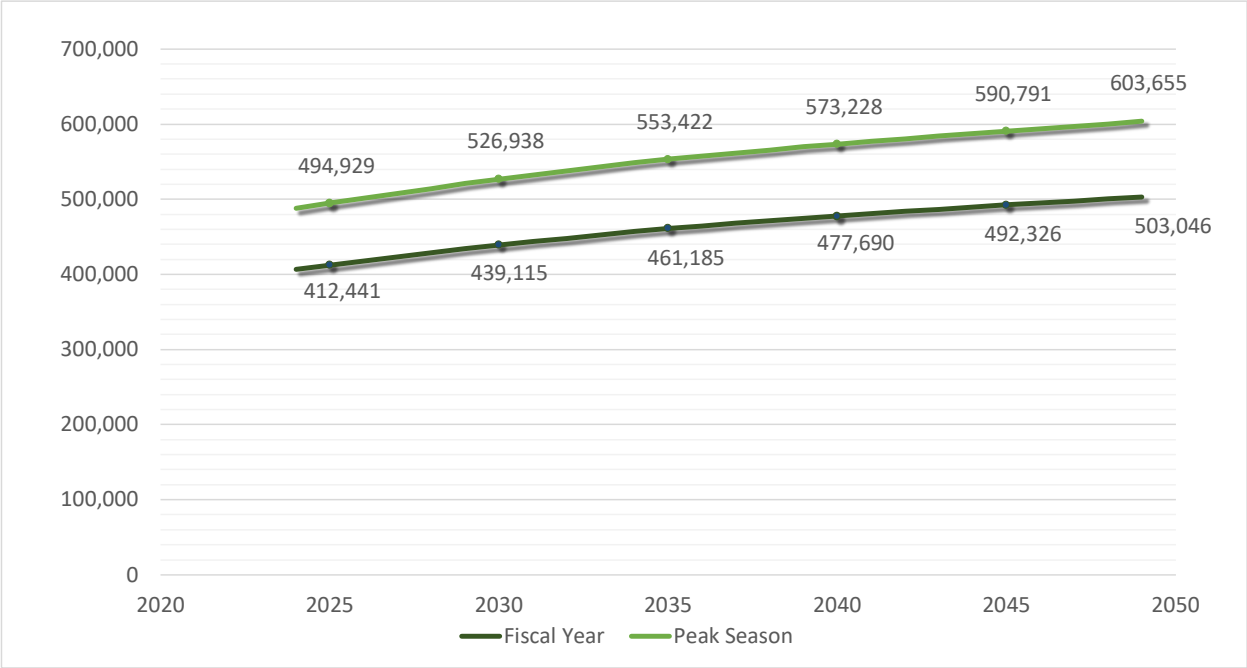


Figure 1-4: Collier County year by year population projections (Source: Collier County Government).

Traffic Analysis Zones (TAZ) were used to analyze statistics and change at a smaller geographic unit. Estimated and projected population, employment, and dwelling density values were interpolated from 2015 base year data for Collier's 2050 Long Range Transportation Plan (LRTP). Employment will be discussed in another section of the report.

Figure 1-5 and Figure 1-6 depict population density at the TAZ level for 2015 and 2050, respectively. The estimated population distribution within Collier County for 2015 is highly concentrated in the central business and residential districts of Immokalee, Ave Maria, Pelican Bay, Golden Gate, and other communities around North, East, Central, and South Naples. East Naples and Golden Gate especially has a high concentration of population with several red and orange TAZ blocks symbolizing higher population density. The distribution pattern remains very similar for the projected 2050 population densities, with the addition of Ave Maria to the communities with higher population densities. The areas with higher population density are all located near, if not along the existing transit network, which means that the current network is doing well in providing service in the more populated areas.

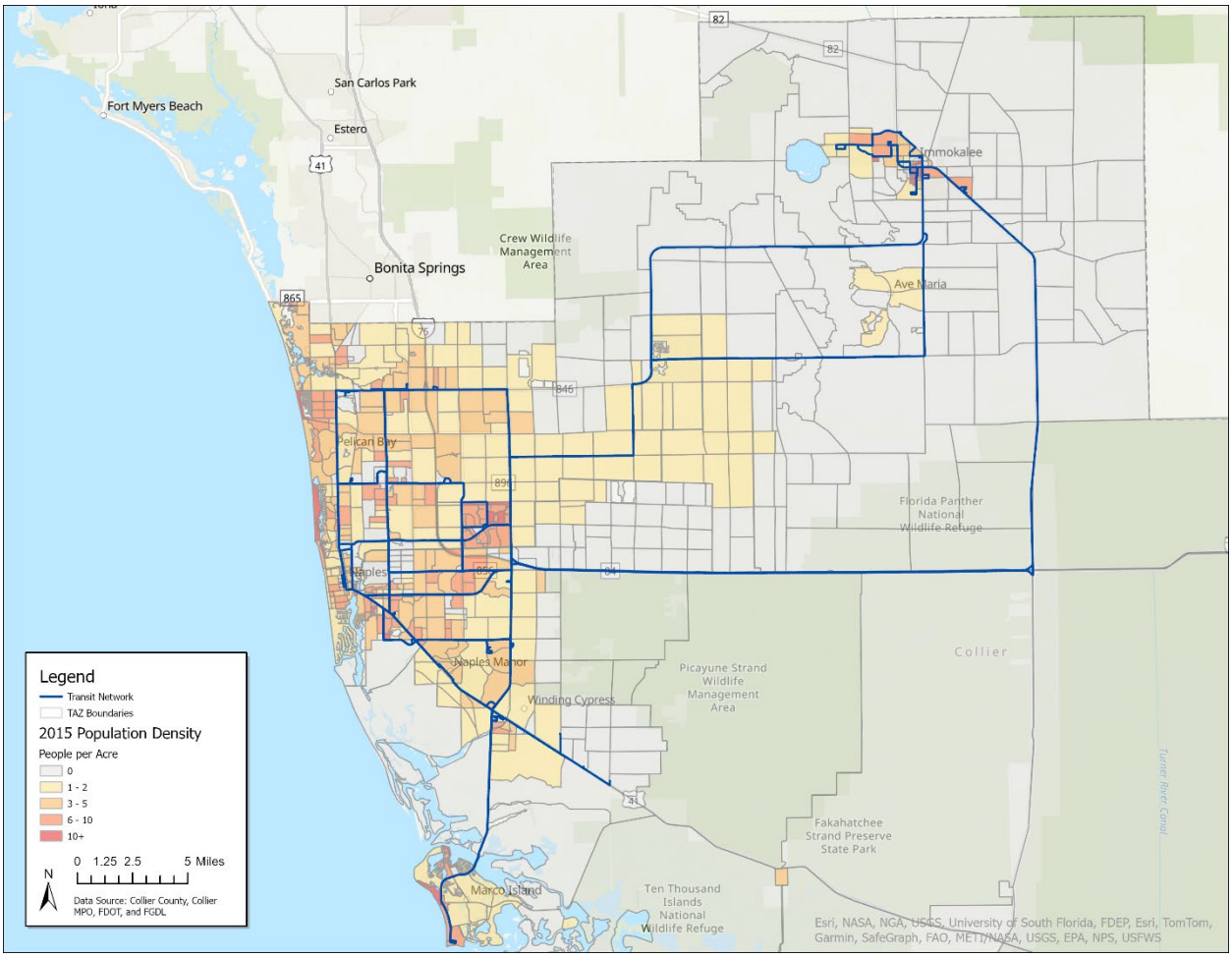


Figure 1-5: Collier County Estimated Population Density by TAZs in 2015.

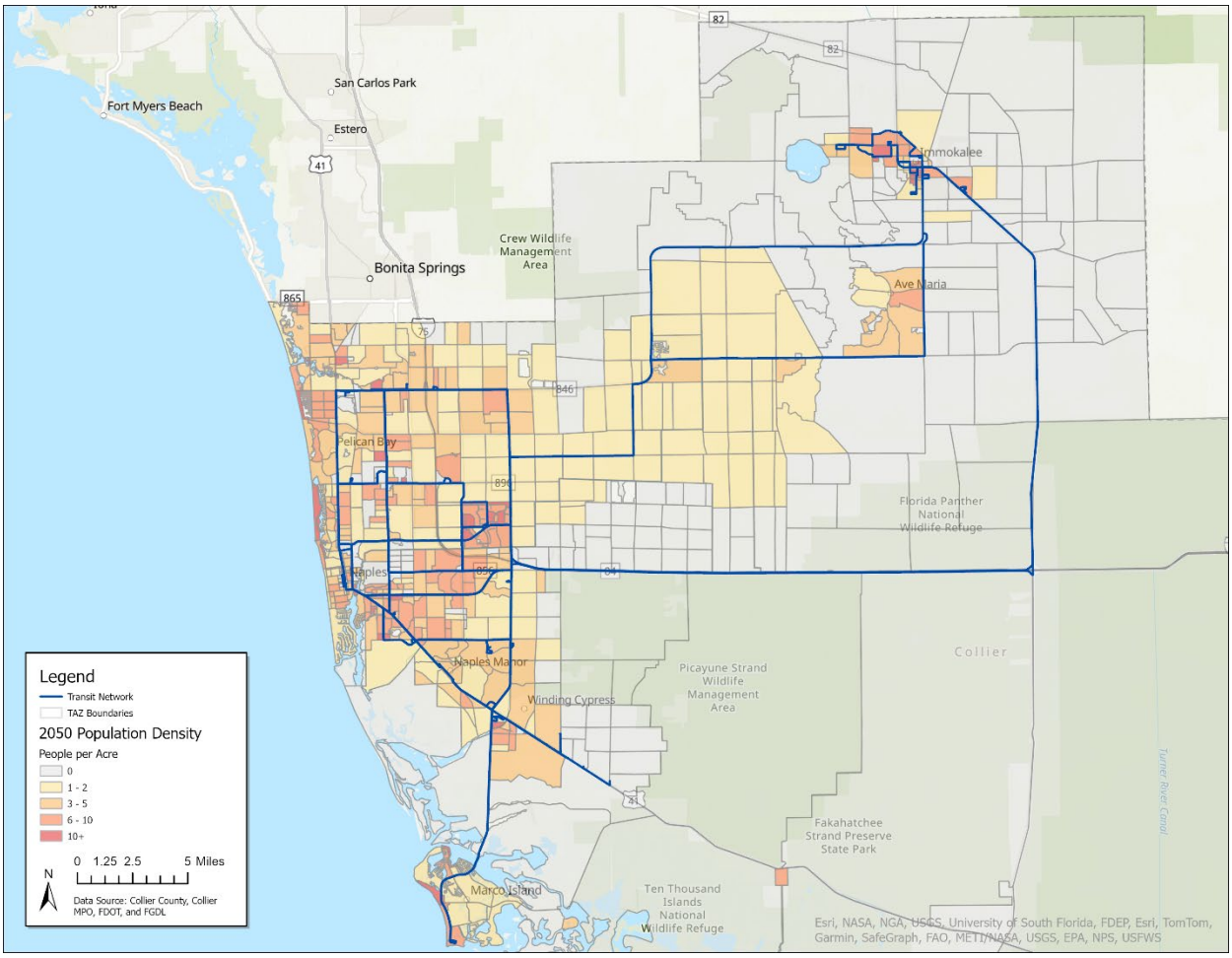


Figure 1-6: Collier County Projected Population Density by TAZs in 2050.

Figure 1-7 shows the population density increase between the 2015 estimates and the 2050 projections. This growth rate map indicates greater increases for the TAZs within and around the urban communities of Immokalee, Ave Maria, Orangetree (west of Ave Maria), Winding Cypress, and Golden Gate. There are also a few TAZ blocks around North and South Naples with high growth rates, symbolized in red showing higher population density increase. These areas of high growth indicate potential for more transit demand as the population increases. The agricultural areas next to these communities appear to have little to no population growth, specifically outside of Immokalee and in the parks or nature reserves, which is expected as there are limited residential areas and fewer dwelling units there.

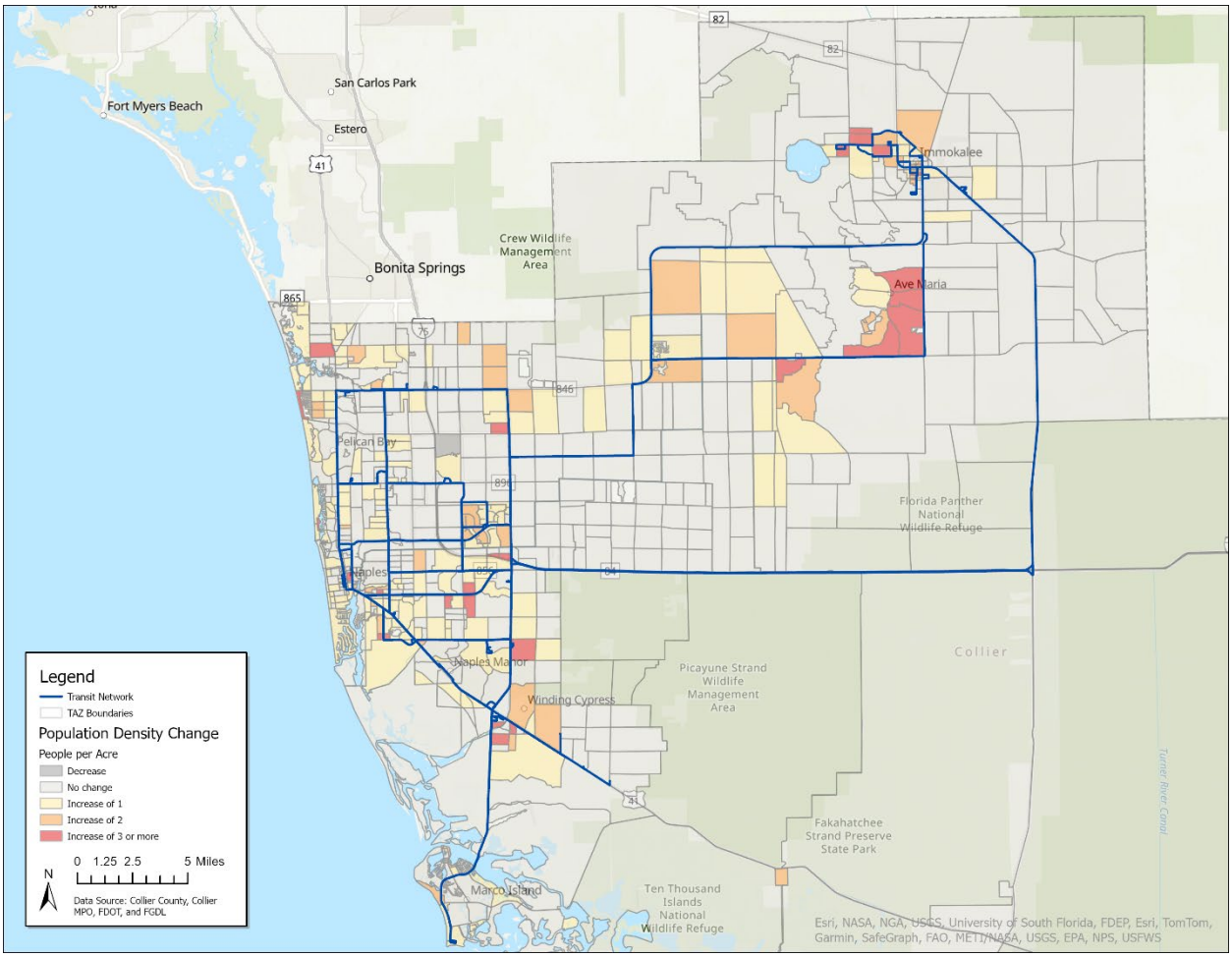


Figure 1-7: Collier County Population Density Growth per TAZ from 2015 to 2050.

Figure 1-8 and Figure 1-9 illustrate the distribution of dwelling units at the TAZ level for 2015 and 2050, respectively. Similar to the population distribution in Collier County, higher numbers of dwelling units are seen in and around Golden Gate and East and South Naples, indicating greater resident occupancy and transit demand in these regions. Higher dwelling unit numbers are also observed along the Gulf of Mexico coast in Central Naples and Marco Island. This distribution pattern remains very similar for the 2050 estimated projections. Again, following population density patterns, areas with higher numbers of dwelling units are all located near, if not along, the existing transit network, indicating that the current network is doing well in providing service in the more populous residential areas.

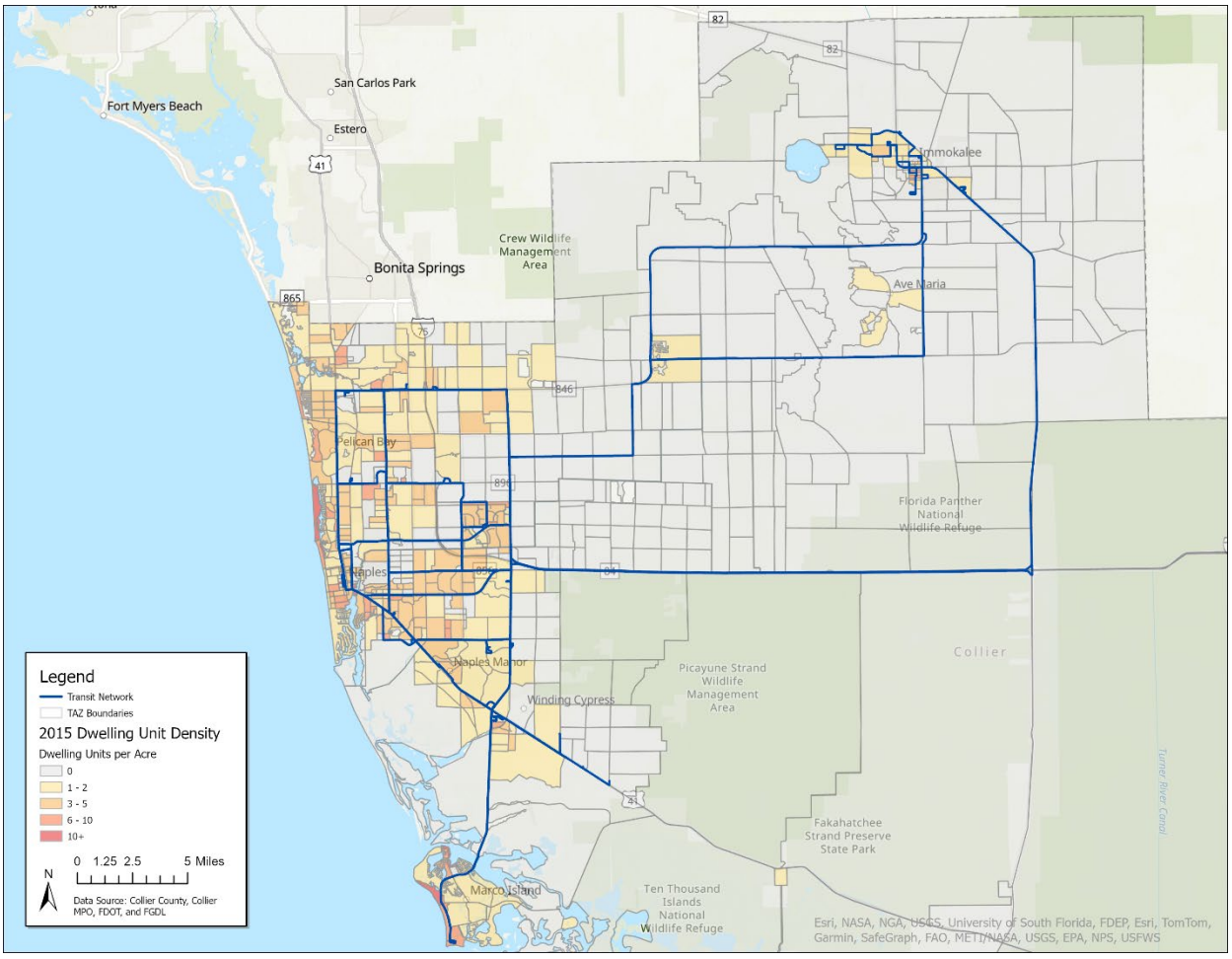


Figure 1-8: Collier County Estimated Dwelling Unit Density per TAZ in 2015.

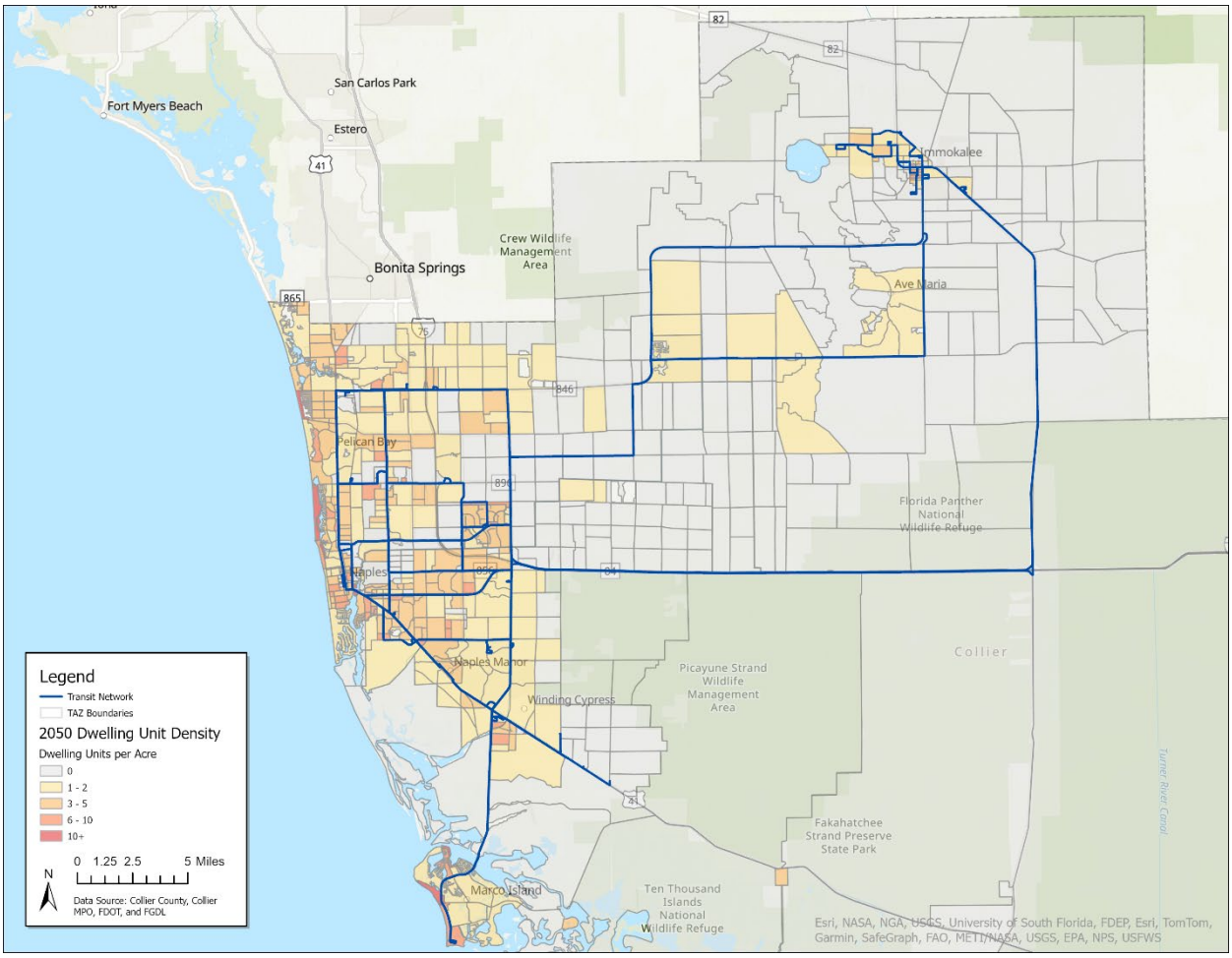


Figure 1-9: Collier County Projected Dwelling Unit Density per TAZ in 2050.

Figure 1-10 shows the increase in dwelling unit density per TAZ between the 2015 estimates and the 2050 projections. This growth change map indicates that there will not be a significant increase in dwelling units per acre in Collier County. There are a few TAZ blocks with greater increases in Ave Maria, South Naples, and Winding Cypress. As with population growth, the agricultural areas next to these communities appear to have little to no increase in dwelling units, specifically outside of Immokalee and in the parks or nature reserves, which is expected as there are limited residential areas and less dwelling units there. The increase in dwelling unit density appears to be slower than population density increase, as there are much less higher increase blocks (symbolized by red and orange) in the dwelling unit density maps compared to the population density maps.

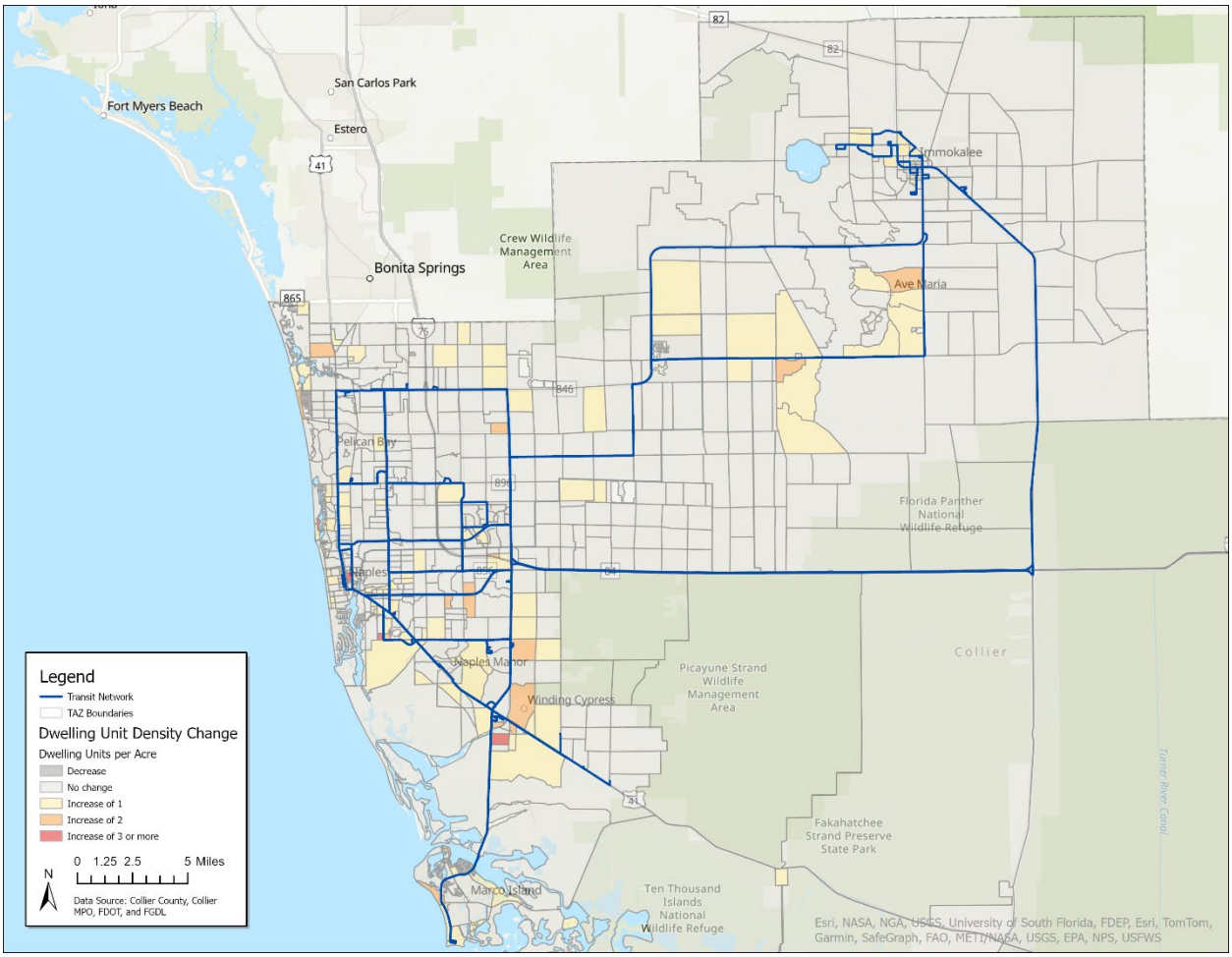


Figure 1-10: Collier County Dwelling Unit Density Increase by TAZ from 2015 to 2050.

1.3 Demographic Characteristics

Demographic characteristics such as age, household income, poverty status and the number of vehicles available in a household are key indicators to helping understand transit propensity. Table 1-1 summarizes these characteristics pulled from data from the United States Census Bureau in the years of 2010, 2018, 2020 and 2022.

Table 1-1: Collier County Demographic Characteristics

Characteristic	2010	2018	2020	2022
Gender				
Male	49.7%	49.3%	49.2%	49.5%
Female	50.3%	50.7%	50.8%	50.5%
Ethnic Origin				
White	85.8%	88.1%	84.5%	73.2%
Black or African American	6.6%	7.0%	6.8%	6.5%
Other	6.4%	3.6%	3.6%	5.6%
Two or more races	1.1%	1.3%	5.2%	14.6%
Hispanic Origin				
Not of Hispanic/Latino origin	74.8%	72.5%	72.0%	71.4%
Hispanic or Latino origin	25.2%	27.5%	28.0%	28.6%
Age				
<15 years	20.0%	18.8%	18.6%	18.2%
15-59 years	62.1%	59.9%	59.1%	59.8%
60+ years	17.9%	21.3%	22.3%	22.0%
Household Income				
Under $10,000	7.2%	6.3%	5.8%	4.9%
$10,000-$49,999	40.9%	35.8%	33.2%	28.9%
$50,000-$99,999	30.9%	30.0%	30.0%	28.9%
$100,000-$200,000	16.7%	20.9%	22.7%	25.9%
$200,000 or more	4.2%	7.0%	8.3%	11.4%
Poverty Status				
Above poverty level	86.2%	85.9%	87.2%	87.5%
Below poverty level	13.8%	14.1%	12.8%	12.5%
Vehicle Available in Household				
None	4.3%	4.3%	4.2%	4.3%
One	21.1%	20.6%	20.1%	20.3%
Two	42.5%	41.0%	40.5%	40.3%
Three or more	32.1%	34.1%	35.2%	35.2%

Source: 2010 ACS 5-year estimates, 2018 ACS 5-year estimates, 2020 ACS 5-year estimates, 2022 ACS 5-year estimates

A significant portion of the population owns two or more vehicles, and around a third of the residents in Collier County have an annual income exceeding $100,000. Combined, these statistics may indicate a lower propensity to use transit among the community. Household income reveals an increasing disparity between the rich and poor, as those earning over $100,000 have increased from 16.7% to 25.9%, while those earning under $10,000 have only decreased around 2%. Moreover, the percentage of the population living above the poverty line has only shown a slight increase. In Figure 1-11, changes in income brackets are shown over time.

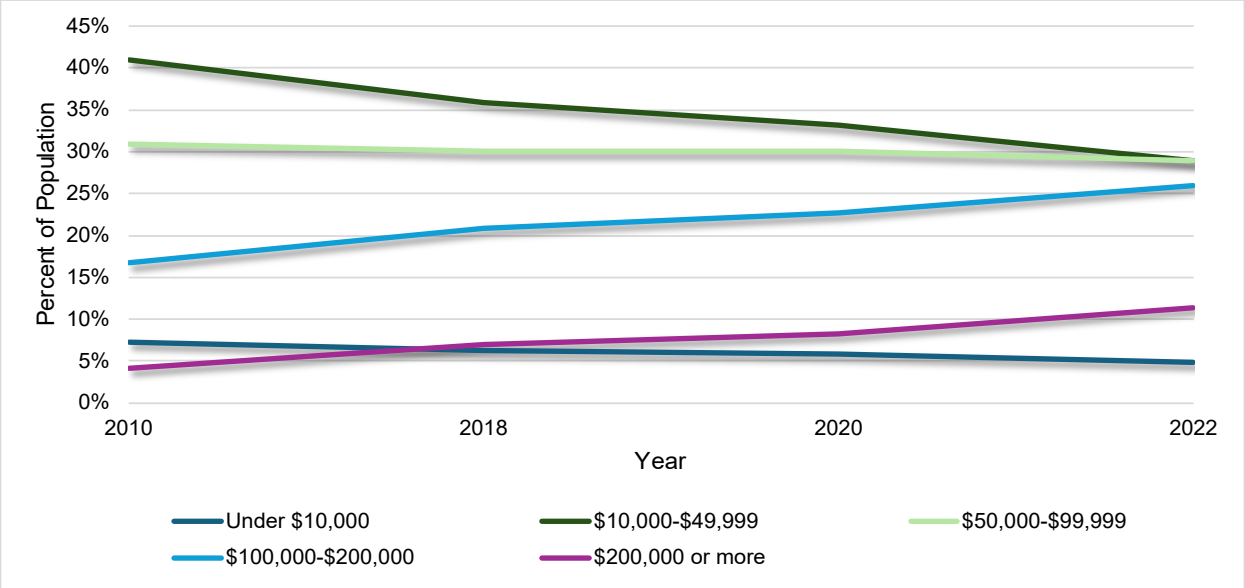


Figure 1-11: Household Income Over Time in Collier County

Source: 2010 ACS 5-year estimates, 2018 ACS 5-year estimates, 2020 ACS 5-year estimates, 2022 ACS 5-year estimates

The percentage of individuals earning less than $10,000 annually declined from 7.2% in 2010 to 4.9% in 2022, reflecting a 2% decrease. Conversely, those earning $100,000 or more saw a 10% increase, indicating a faster rate of income growth among higher earners. As incomes rise, fewer individuals may rely solely on public transportation, with increased access to private vehicles or alternative options. The percentage of those earning between $50,000 and $99,999 has remained stable, representing a group that may still favor public transit for its convenience and cost-effectiveness, particularly in urban areas where traffic congestion and parking costs are significant. Additionally, the proportion of individuals earning $200,000 or more grew by 7% between 2010 and 2022.

The age distribution among males and females has remained relatively consistent from 2000 to 2022, with a balanced ratio between genders, each comprising about half of the population. The ethnic majority remains Caucasian. Over time, there has been a slight decrease in the youth population and a corresponding rise in the senior population, underscoring the growing need for accessible services. Notably, the percentage of residents aged 60 and older is on the rise, potentially increasing demand for fixed-route transit and paratransit services. Figure 1-12 illustrates the population distribution by gender and age group, showing Collier's aging population, where older age groups now surpass younger ones.

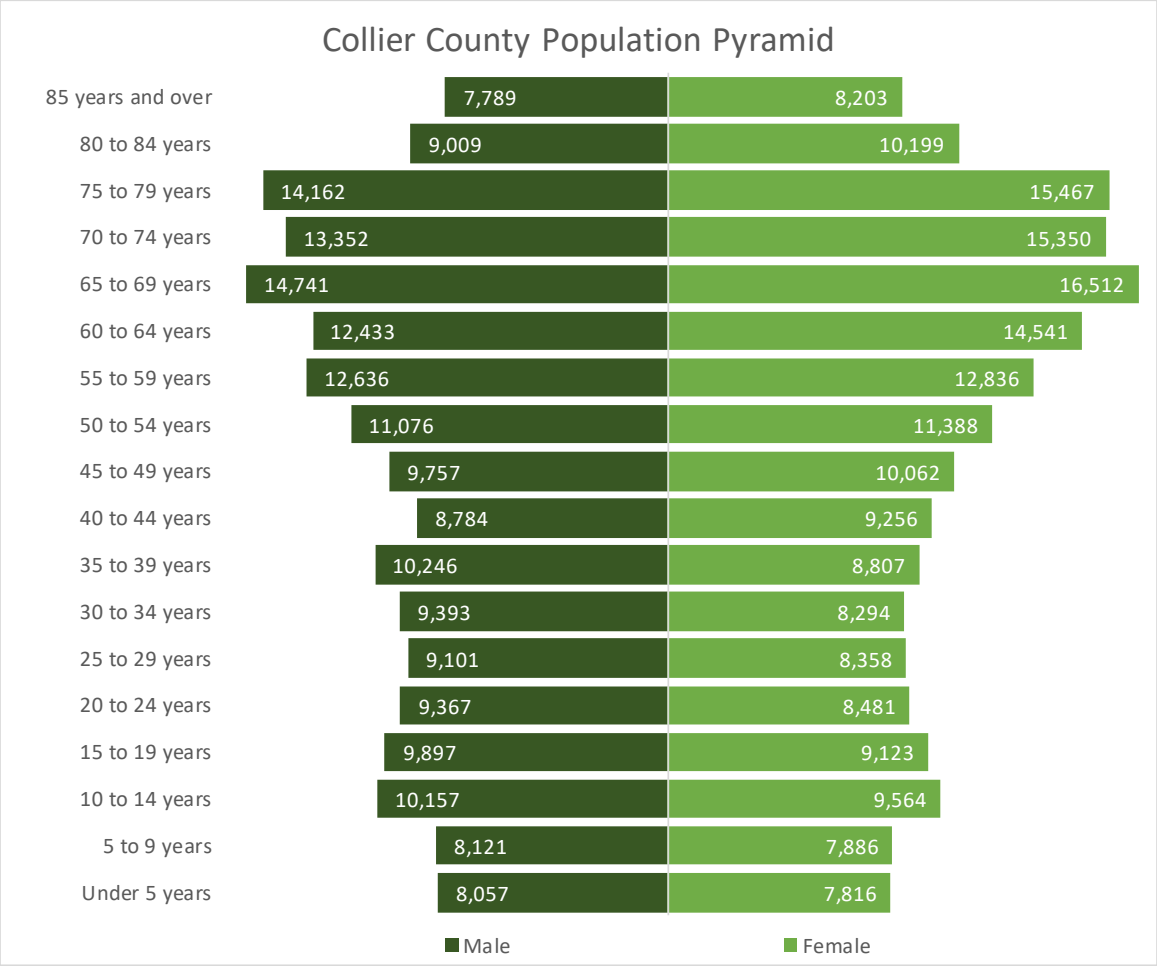


Figure 1-12: Population Age Distribution in Collier County

Since 2010, over 95% of households in Collier County have consistently had access to at least one vehicle, with less than 5% of households lacking a private vehicle. Although this percentage is small, it remains a significant demographic indicator, highlighting areas that may be more dependent on public transit and could potentially benefit from enhanced service. Increasing transit options could also encourage a shift among the majority who currently rely on private vehicles, offering convenient alternatives that promote greater use of public transportation for daily travel.

Figure 1-13 illustrates the distribution of households without vehicles across Collier County at the TAZ level. The existing transit network appears to serve most of these areas effectively, though coverage is limited in regions further east of Immokalee/Ave Maria near the conservation or rural areas. A small number of no-vehicle households are also present in Everglades; however, transit service is absent in much of southern Collier County, leaving this area underserved by the current network.

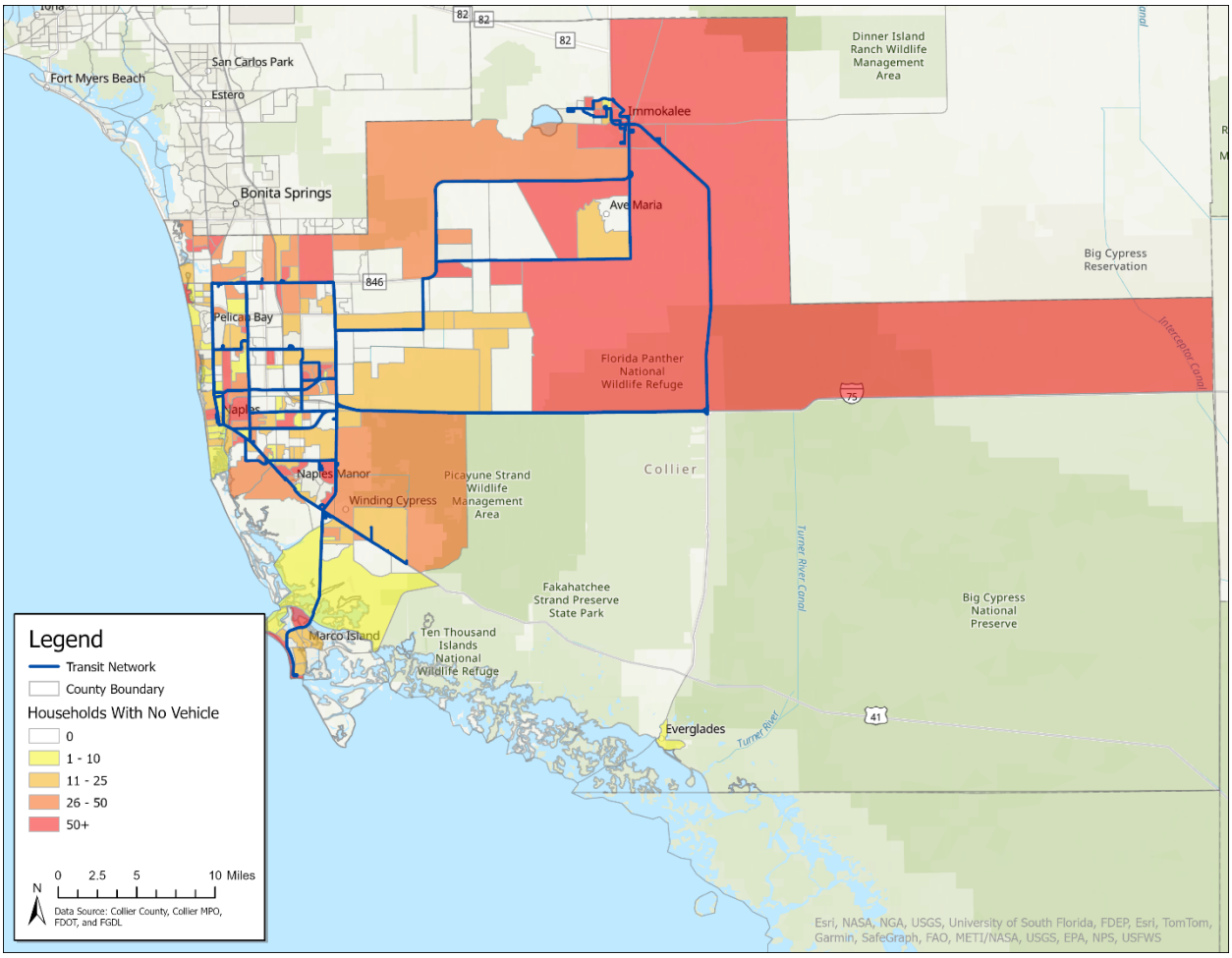


Figure 1-13: Distribution of Households with No Vehicle in Collier County in 2022.

1.4 Transportation Disadvantaged Population

The Transportation Disadvantaged (TD) population represents a key demographic with a growing need for public transit services, including fixed route services. As part of its paratransit service known as CAT Connect, CAT provides transportation to the eligible TD population with service available children who are handicapped or high-risk or at-risk persons, who because of physical or mental disability, income status, or age or who for other reasons are unable to transport themselves or to purchase transportation and are, therefore, dependent on others to obtain access to healthcare, employment, education, shopping, social activities, or other life sustaining activities. Table 1-2 shows the total number of TD trips served between 2019 to 2024.

Table 1-2: Collier County transportation disadvantaged trips served.

	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	% Change (2019-2024)

TD Trips Served	117,585	104,137	113,598	109,044	133,799	156,438	33.0%

Source: Collier County Community Transportation Coordinator's Annual Operating Reports, Fiscal Years 2019-2024.

The number of TD trips served through CAT's brokered system, as the Community Transportation Coordinator (CTC) for Collier County, increased 33% from 117,585 in 2019 to 156,438 in 2024. This demonstrates the increasing desire and need for more paratransit trips in the region. Figure 1-14 shows the number of TD passengers served from 2019 to 2024.

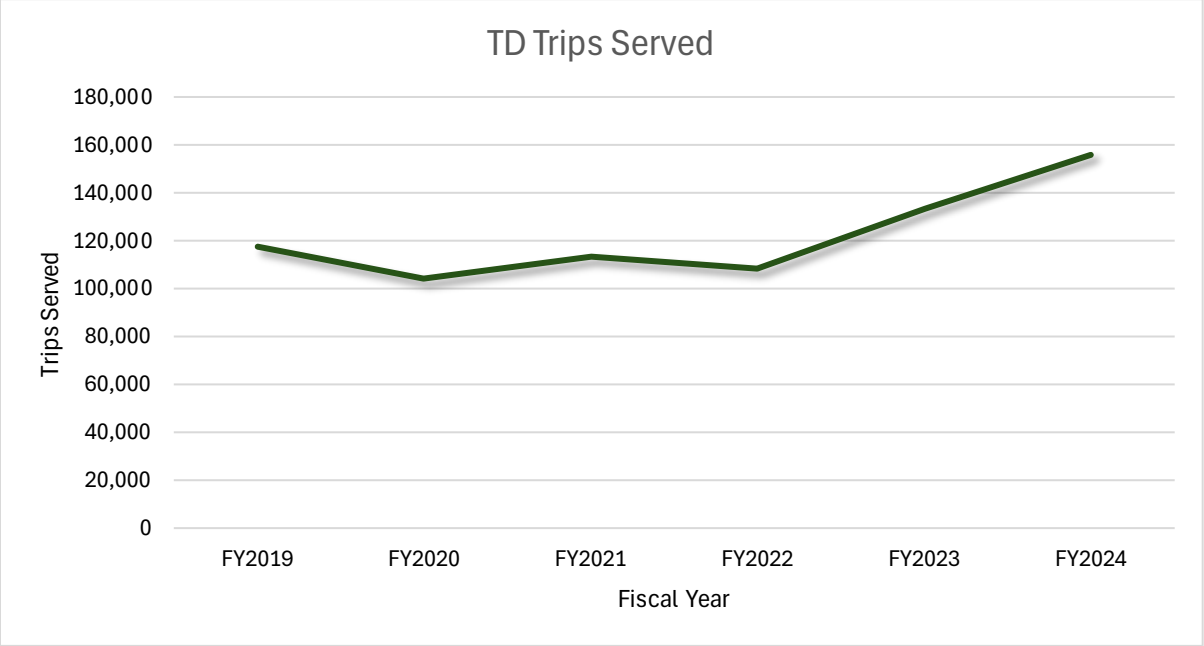


Figure 1-14: Collier County transportation disadvantaged trips, 2019–2024 (Source: Collier County Community Transportation Coordinator's Annual Operating Reports, Fiscal Years 2019-2024).

During this period, the total number of TD passengers followed an overall upward trend, despite occasional dips in ridership in 2020 and 2022, likely caused by the lasting effects of the COVID-19 pandemic. The most notable growth in TD trips occurred between 2022 and 2023, with a 22% increase. As TD ridership continues to expand, it will be essential to ensure adequate services are available to support this community, while also promoting access to fixed-route services, which offer a more cost-effective option for all users. As shown in Figure 1-15 below, TD trips have increased in line with population growth. As per the 2023 TDSP, the potential TD population is 165,309. This is expected to increase year after year.

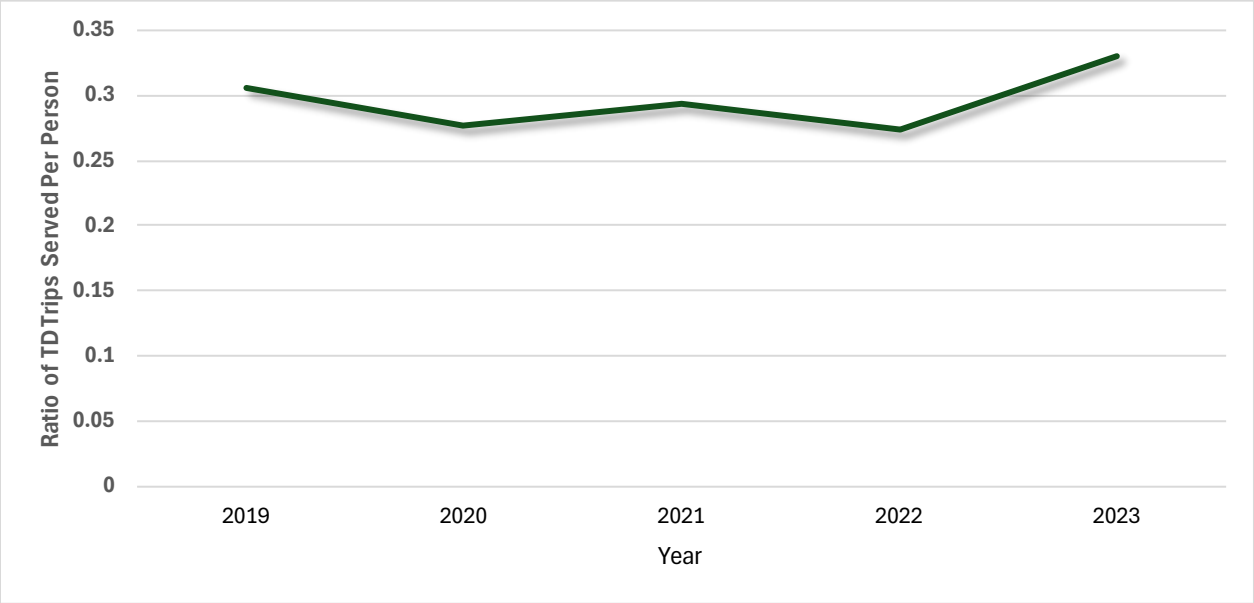


Figure 1-15: Ratio of TD Trips to Total Population.

1.4.1 RECENT IMPROVEMENTS TO PARATRANSIT SERVICES

Several improvements have been implemented to the paratransit services in Collier County as outlined by the CAT Connect Paratransit Service Report. Ecolane, a paratransit software, has been implemented, and Travel Trainings provided by CAT have been ongoing. Additionally, improvements to the phone systems have resulted in a decrease in average queuing time and a reduction in abandoned calls.

1.5 Labor and Employment Characteristics

The employment sector distribution in Collier County not only reflects the economic vitality and job market trends but also serves as a critical indicator of transit dependency and the necessity for inclusive transportation planning. Figure 1-16 and Figure 1-17 show the estimated and projected employment densities at the TAZ level in 2015 and 2050, respectively. As commercial areas and places of employment grow and develop, urban communities such as Pelican Bay, Golden Gate, Immokalee, Marco Island, and Naples will experience a higher increase in employment numbers. This is depicted in the employment distribution maps, as the TAZs around these urban communities have higher employment numbers compared to the rest of the County, represented by yellow, orange, and red. Especially Pelican Bay, Golden Gate, and Central Naples, as the projected 2050 map shows many TAZ blocks in red, symbolizing more than 10 jobs per acre. These TAZs are mostly located along the existing transit network, which means that the current network is doing well in providing service in the more employment-dense areas.

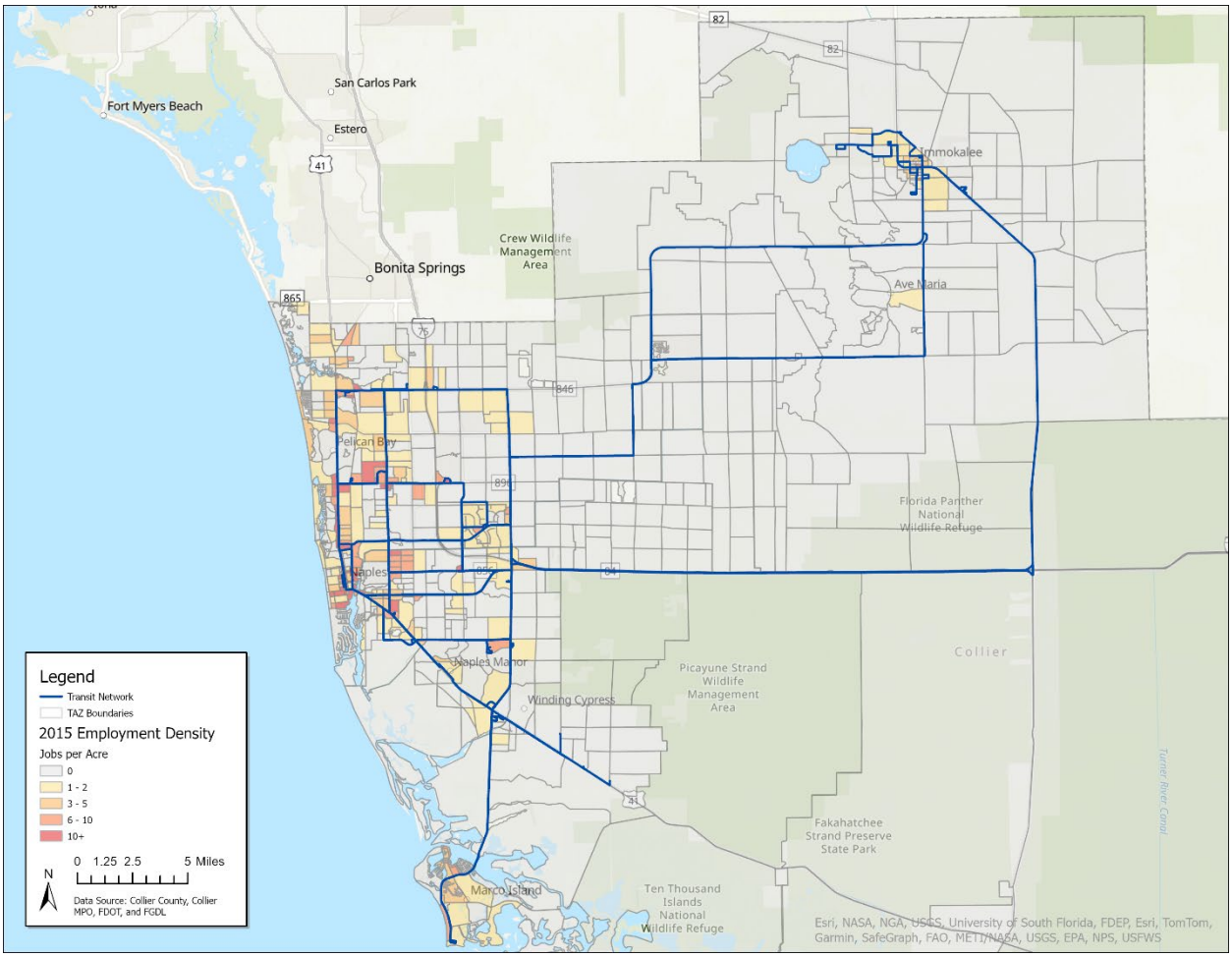


Figure 1-16: Collier County Estimated Employment Density by TAZs in 2015.

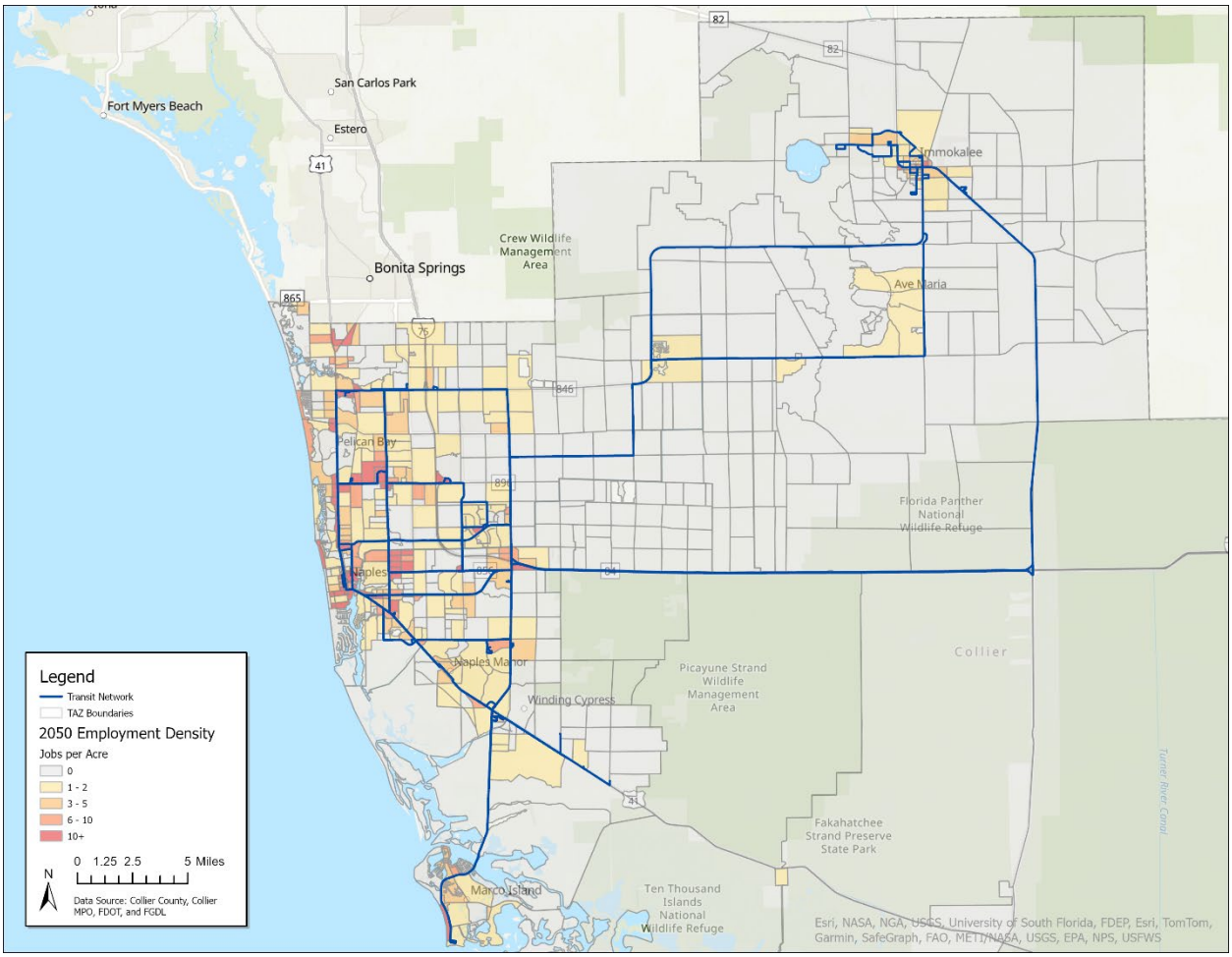


Figure 1-17: Collier County Projected Employment Density by TAZs in 2050.

Figure 1-18 shows the employment density increase between the 2015 estimates and the 2050 projections. The TAZs with higher growth rates seem to be scattered across Collier County, but are mainly located around the communities of Immokalee, Golden Gate, Pelican Bay, North Naples, and Central Naples. The high growth areas for employment are centered around the urban communities and along the existing transit network. Areas with high increases in employment numbers indicate potential for more transit demand as employment opportunity increases, generating more trips to get to these destination points.

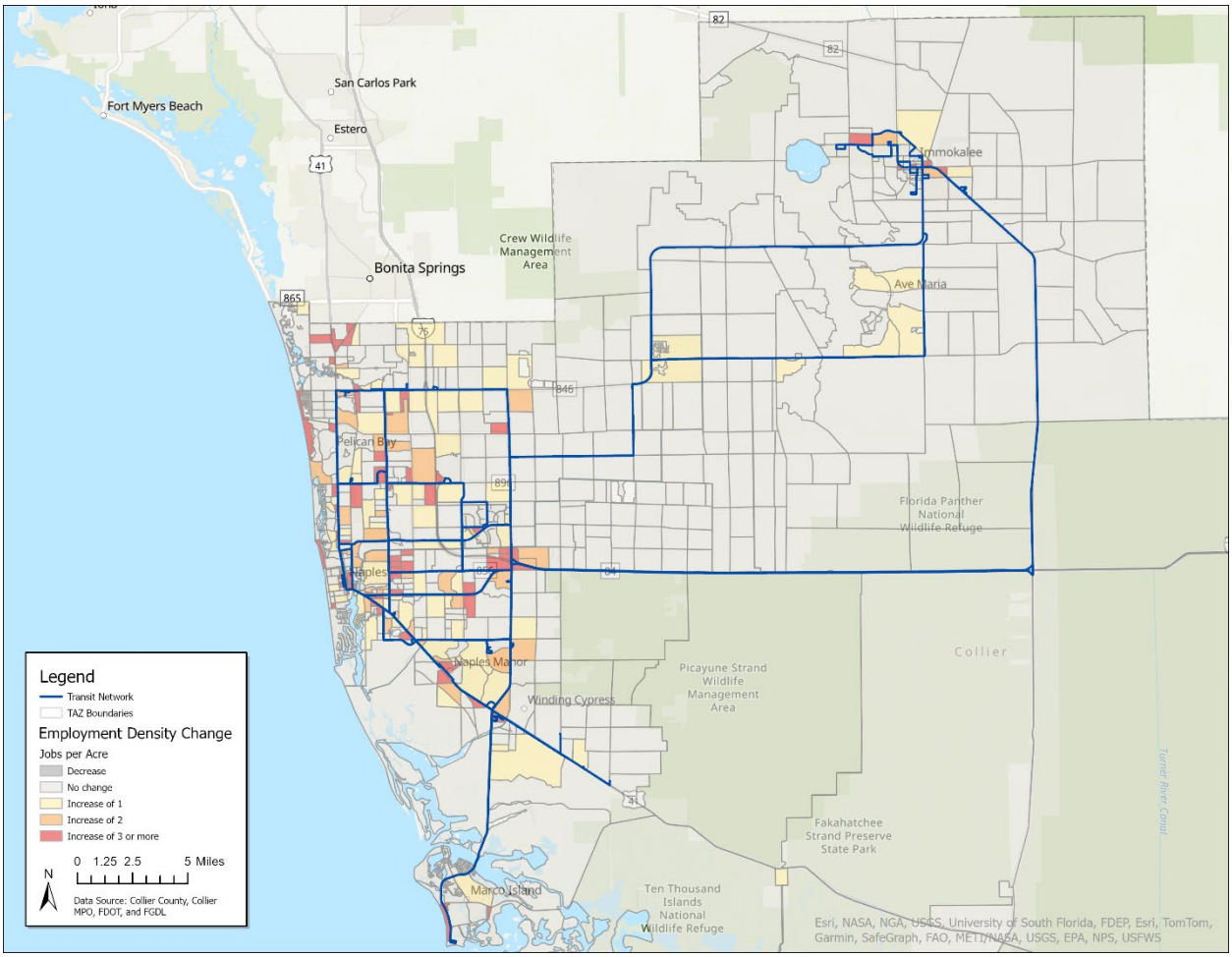


Figure 1-18: Collier County Employment Density Growth by TAZs from 2015 to 2050.

Figure 1-19 illustrates the distribution of employment across various sectors in Collier County in 2010, 2020 and 2022, offering insights into which sectors most influence the mobility requirements of the residents in before, during and after the COVID-19 pandemic.

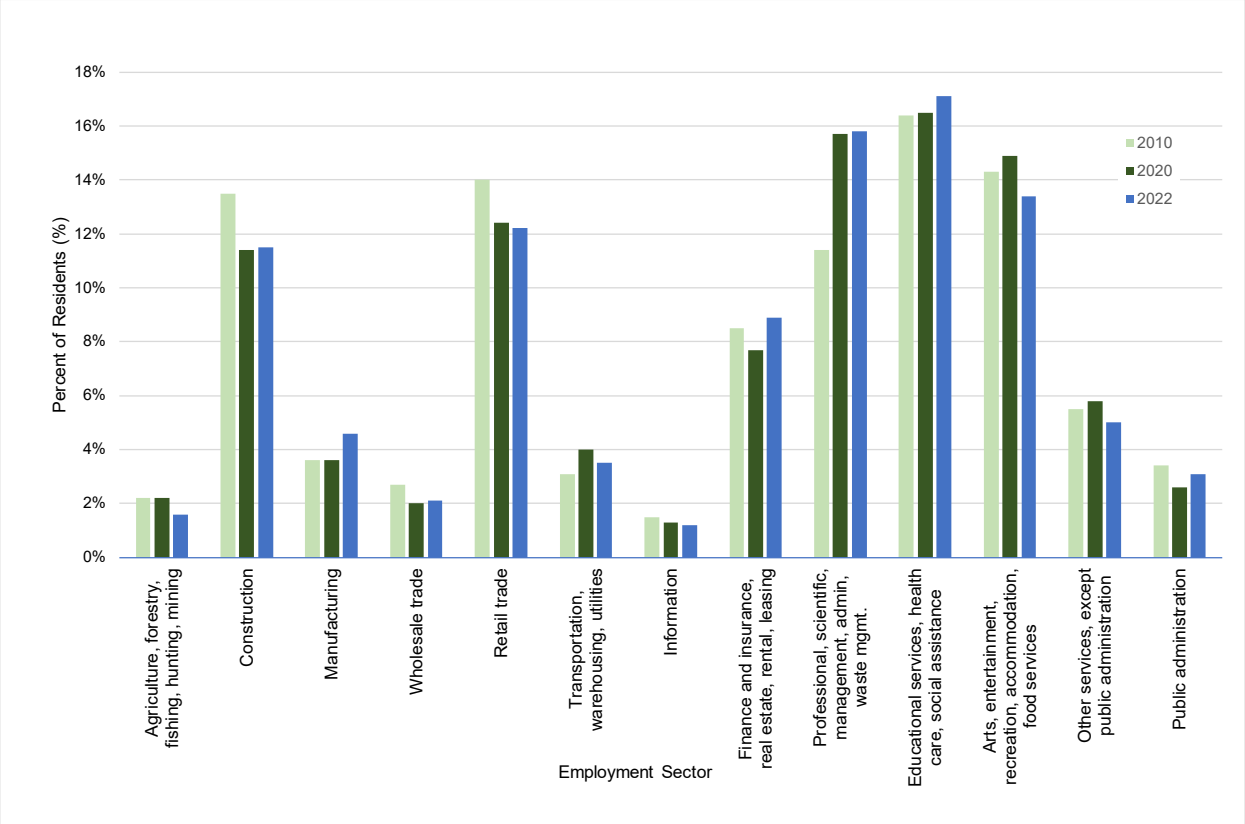


Figure 1-19: Collier County Labor Force Distribution by Service Area, 2010, 2020, and 2022.

Source: 2010 ACS 5-year estimates, 2020 ACS 5-year estimates 2022 ACS 5-year estimates.

As seen from Figure 1-19, the largest employment sectors in Collier County from 2010 to 2022 were the educational services, health care and social assistance sectors at around 16-17% of the workforce. Following closely is professional, scientific, management, administrative, waste management services and the arts, entertainment, recreation, accommodation, and food services sectors, each accounting for approximately 11-15% of the workforce. From Figure 1-11, a greater percent of the population earns more than $50,000. Thus, over time, more residents in Collier County can afford personal transportation, which may reduce their reliance on public transit. This observation also presents itself in Table 1-1; most of Collier's households own two or more cars. In contrast, sectors such as agriculture, forestry, fishing, hunting, mining, and transportation and warehousing, and utilities have experienced a downtick in their share of the workforce from 2010 to 2022. These types of jobs tend to have less employees working from home, leading to a higher reliance on personal vehicles or transit options in the County. Overall, the figure highlights the need for targeted transit solutions that cater to the unique needs of each employment sector, ensuring equitable access to mobility for all residents, regardless of income level.

According to commuting patterns derived from the US Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES), there were 150,665 total jobs where the workers lived in Collier and 150,529 jobs where residents worked in Collier in 2021, 93,937 of which were intra-county jobs where the worker both lived and worked in Collier (62% of all jobs). Aside from internal trips within Collier County, Lee County is primary origin location where people working in Collier but residing outside of the county travel from and is also the primary destination for Collier County residents that work outside of the county. In 2021, 19% of people that worked in Collier County lived in Lee County,

compared to 3% or less for each of the other origin counties, and 13% of workers that lived in Collier County worked in Lee County, compared to 4% or less for each of the other destination counties.. This highlights the extent to which the labor markets of the two counties are interconnected.

Figure 1-20 shows the unemployment rates in years ranging from 2010-2022 based on ACS 5-year estimates.

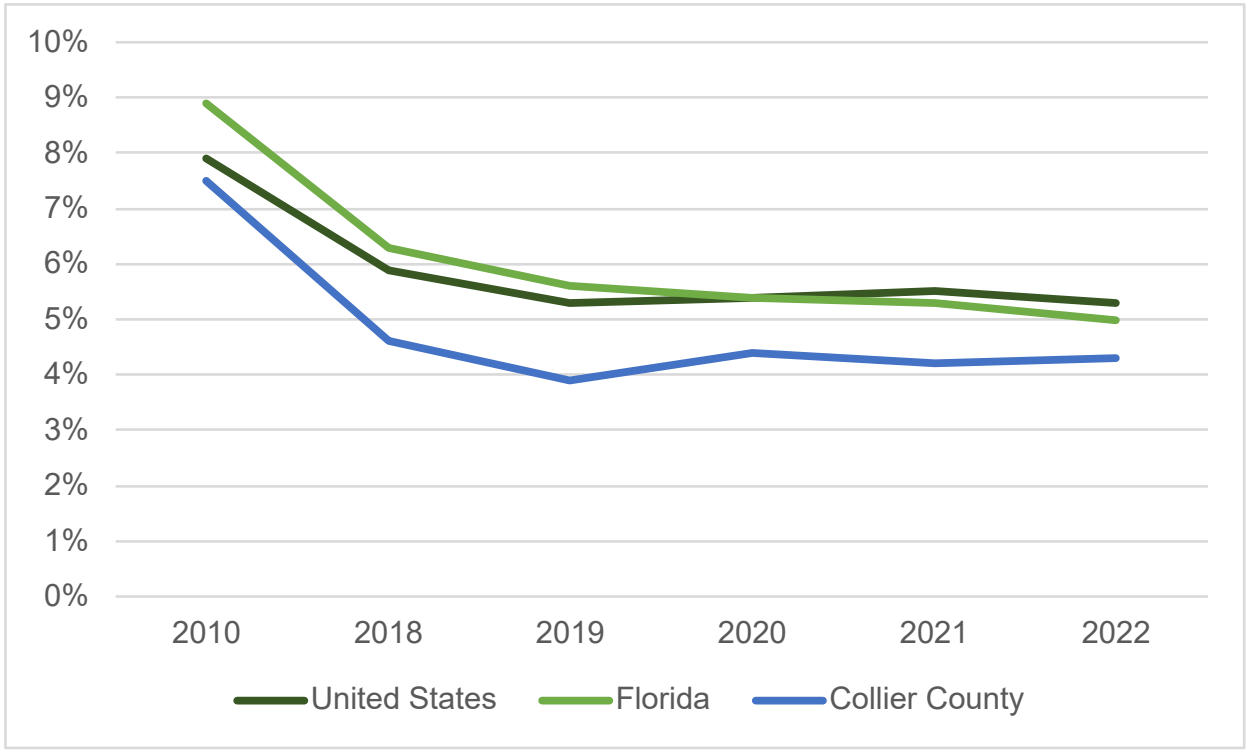


Figure 1-20: National, State and County Unemployment

In 2010, Collier County experienced higher unemployment rates. However, since then, there has been a consistent decline year by year. Collier County's unemployment rates consistently outperformed both national and state-wide averages. Even during the pandemic, when many regions faced economic challenges, Collier County maintained lower unemployment rates. Lower unemployment rates can correlate with economic recovery, as more people are employed of all income ranges engage in various activities. This increased economic activity can lead to higher public transportation usage.

1.6 Educational Attainment

Levels of educational attainment in the county can correlate with earnings potential and job security. This influences mobility needs. Figure 1-21 shows the educational attainment of residents ages 25 years and older in Collier County.

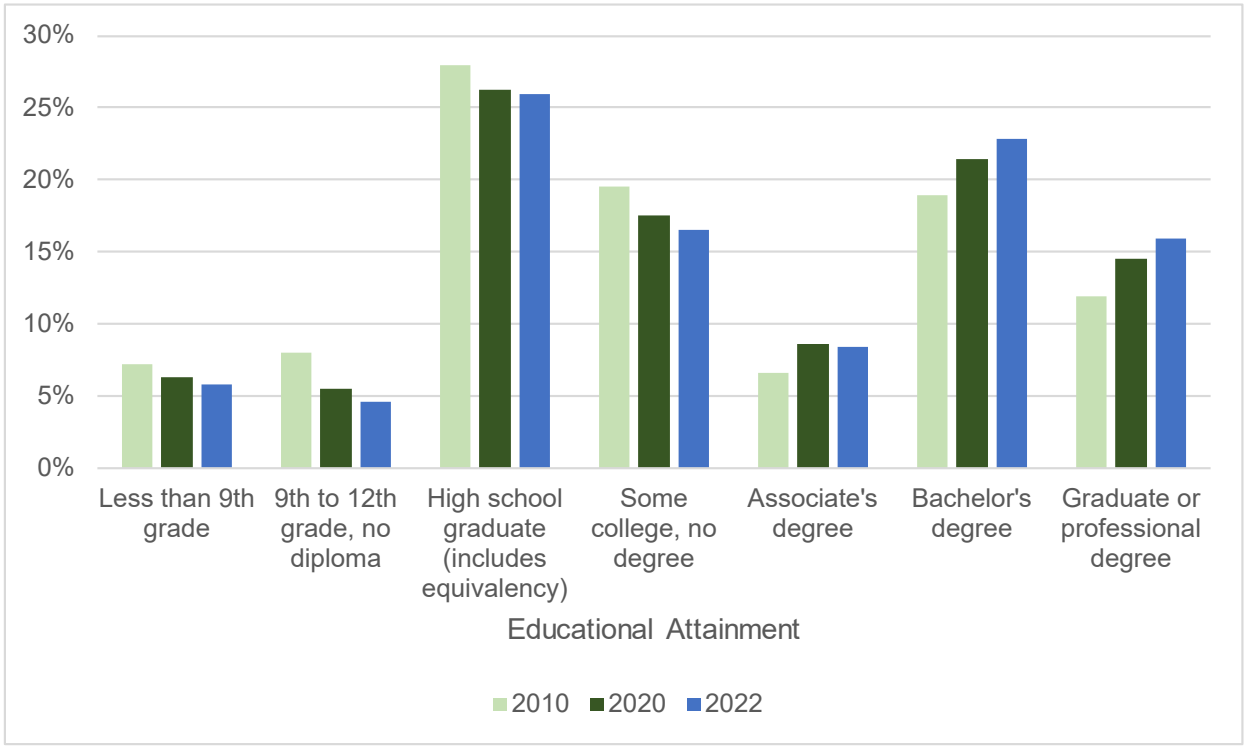


Figure 1-21: Educational Attainment in Collier County.

As seen from Figure 1-21 above, more residents have obtained a bachelor's degree over time from 2010-2022. Despite this, while those obtaining bachelor's and graduate degrees are increasing in the County, approximately 30% of the population does not have a college degree which indicates around a third of the population with potentially lower potential earnings and an increased likelihood of requiring transit service.

1.7 Tourism

Tourism plays a vital role in shaping transportation needs and services within Collier County. Tourists arrive in Collier County year-round, but the peak season spans in the winter from October to April. There are two distinct groups of visitors: seasonal residents who live in Naples for more than 4 months (typically October - April) and those visiting the area as tourists. The Tourist Development Council (TDC) makes a distinction between these groups, as seasonal residents tend to own properties while vacationing visitors do not.

In most tourist destinations, tourists often rely on public transit, especially those accustomed to using it in their home communities and therefore tourists, combined with seasonal visitors and residents contribute to an overall increased transportation demand. According to the Collier County Tourist Development Council and Gulfshore Business, in 2023, through October, Collier County welcomed 2.3 million visitors, generating an economic impact of $3.01 billion (Roesler, 2023). This substantial economic impact underscores the importance of efficient transportation services.

Collier County boasts pristine beaches, attracting sun-seekers and water enthusiasts. Tourists may use various services such as the Breeze Beach Shuttles, bike routes, and bicycle rentals as first mile/last mile access to transit hubs. However, it is worth noting that tourism numbers have shown some fluctuations. For instance, in March 2023, Collier County experienced a 20% year-over-year decline in visitors compared to

March 2022. These fluctuations in visitor numbers can impact transportation needs and usage patterns throughout the year.

Figure 1-22 and Figure 1-23 show key tourist destinations by mapping major points of interests in Collier County in relation to transit line locations in the region. Attractive destinations include airports, beaches, museums, boating areas, and parks. While a grand majority of points of interest lie around the Naples region, there could be more extensive access to the beaches on Marco Island.

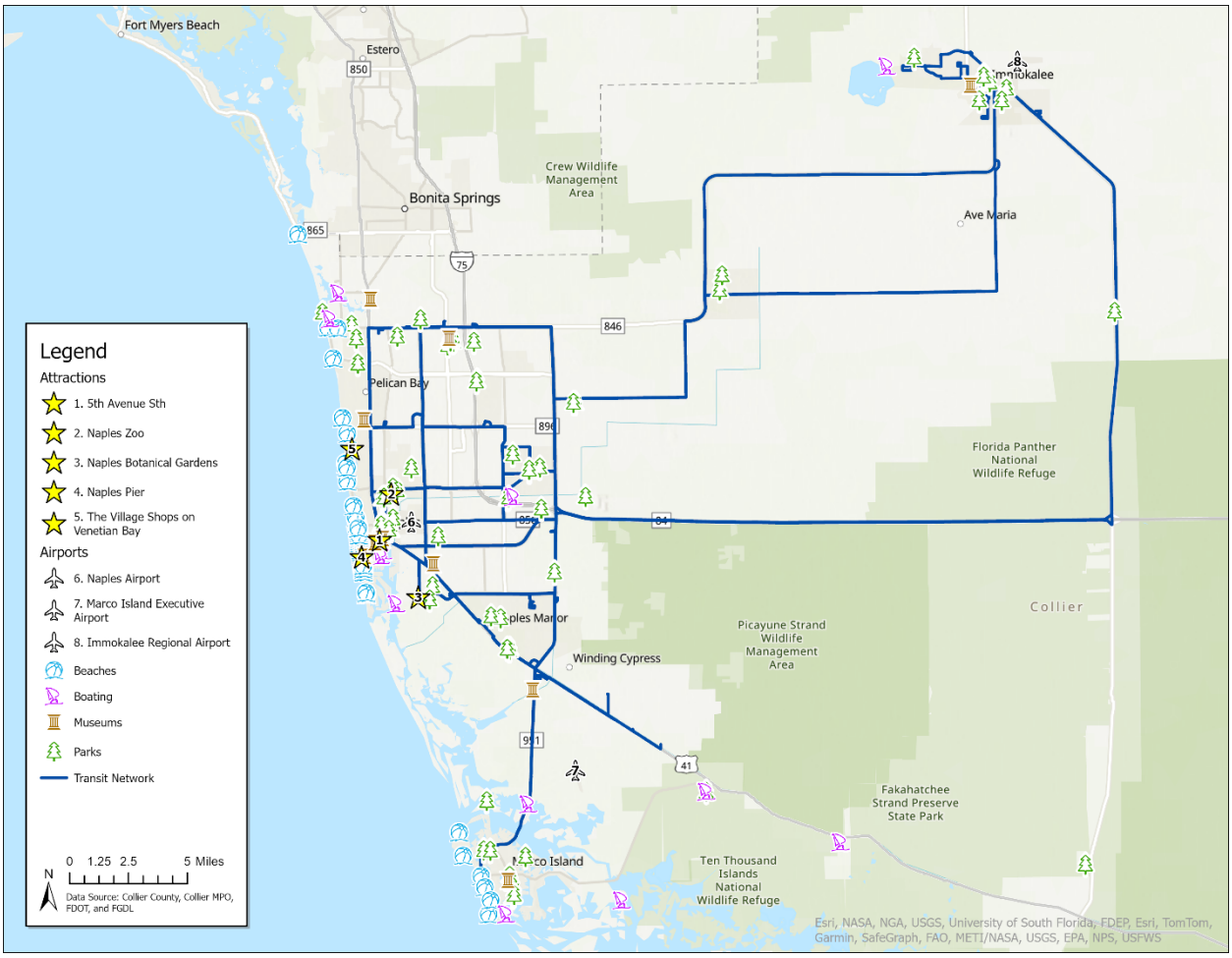


Figure 1-22: Transit Access to Point of Interest Destinations in Collier County.

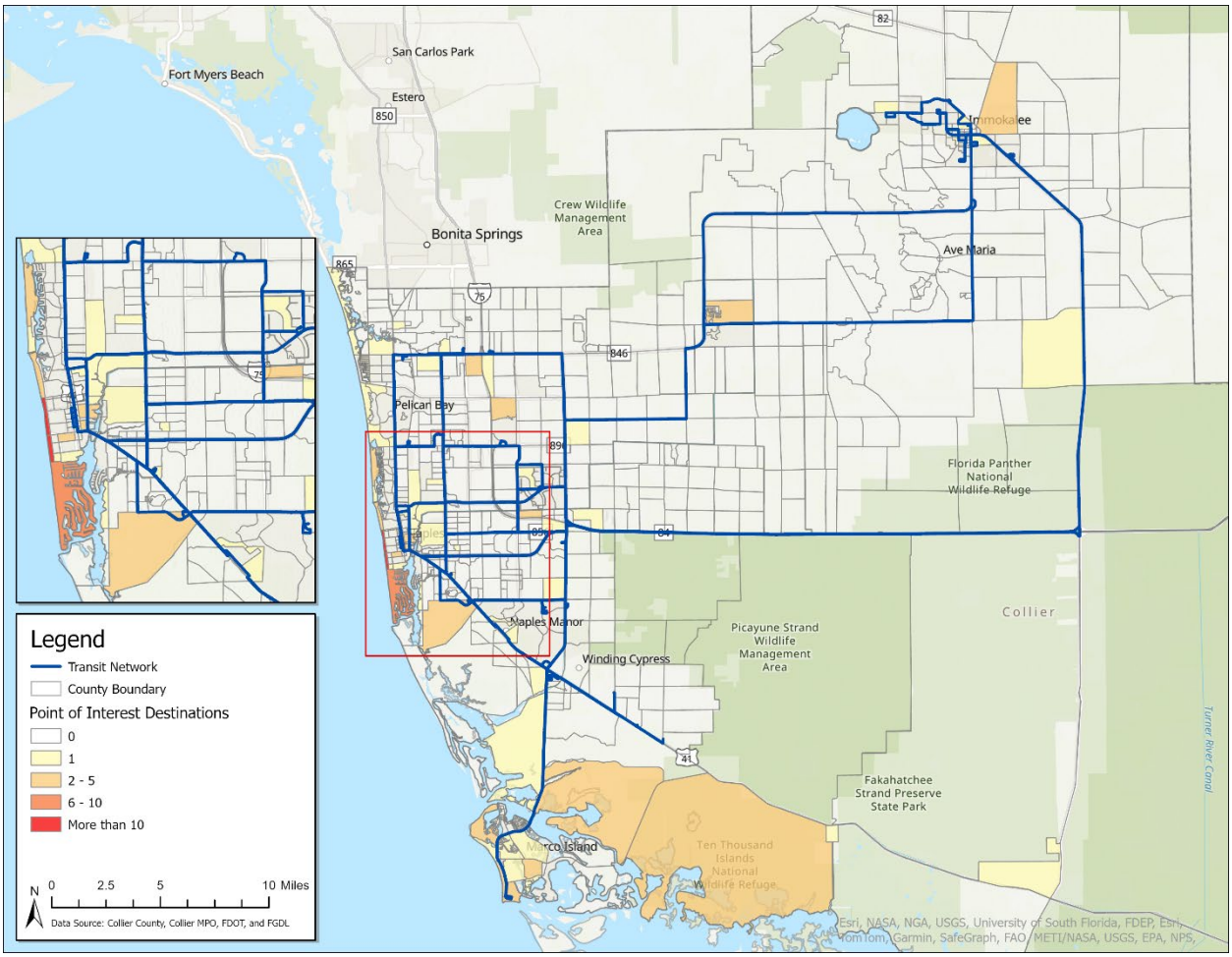


Figure 1-23: Density Map of Point of Interest Destinations by TAZ.

More recently, a study in June 2024 by Florida Gulf Coast University on Regional Economic Indicators (Southwest Florida Economic Outlook, Regional Economic Research Institute, FGCU, 2024) found that seasonally adjusted real tourist tax revenues for coastal counties were up 14% in March 2024 compared to March 2023. In addition, airport passenger activity also increased 12% from April 2023 to April 2024. This suggests that tourists are increasingly visiting Florida's coastal areas, like Collier, and spending more money, which likely reduces their propensity to use transit.

1.8 Major Trip Generators

Understanding the major trip generators within the county can help determine where to provide the most transit service. Table 1-3 displays the top employers in Collier County by the number of employees. The largest employers operate in the educational, government, and healthcare industries. Arthrex, Publix Supermarket, and Gargiulo are the three largest private sector employers in the county. On the other hand, some of Gargiulo's locations are in rural or industrial areas, lacking public transit access. The nearest stop to the location at Oil Well Road is one of Route 19’s stops 2.72 miles away. Further, the closest bus stop to the Gargiulo packing house location in Immokalee is a Route 22 stop 1.63 miles away. Due to all Publix locations being near commercial centers, most, if not all, locations are accessible by transit. Similarly, most, if not all, public-school and local government buildings in the county are surrounded by residential or

commercial hubs areas that have access to public transit stops. As development expands to accommodate more housing and commercial demand (see Section 3.8), it will be necessary for CAT to consider expanding their public transit services.

Table 1-3: Top Employers in Collier County in 2023.

Employer	Number of Employees
Collier County Public Schools	5810
Collier County Local Government	5045
Arthrex	3983
NCH Healthcare System	3288
Publix Super Market	2935
Gargiulo	2082
Pacific Tomato Growers	872
Walmart	807
Marriott International, Inc.	669
Moorings Park	657
Downing-frye Realty Inc.	605
McDonald's	545
Vi at Bentley Village	494
Asg	447
David Lawrence Center	423
Philharmonic Center For The Arts	412
Naples Lake Country Club	402
Walgreens	389
Ave Maria School of Law	372
Heartland Health Care Center Ft Myers	372
Aa Stucco & Drywall Inc.	350
Home Depot	350
Seminole Casino Hotel Immokalee	350
CVS Pharmacy	349
Twineagles Pro Shop	333

Source: Regional Economic Research Institute at Florida Gulf Coast University (2023).

Figure 1-24 and Figure 1-25 show the distribution of top employer locations in Collier County and their distribution relative to existing transit lines. While most places of employment are accessible to transit, there exist many points of interest north of Pelican Bay and North or Immokalee which are further from a transit line. An extension of transit lines along Route 29 and 41 towards Everglades City would be important as well and would increase commercial zones in that area.

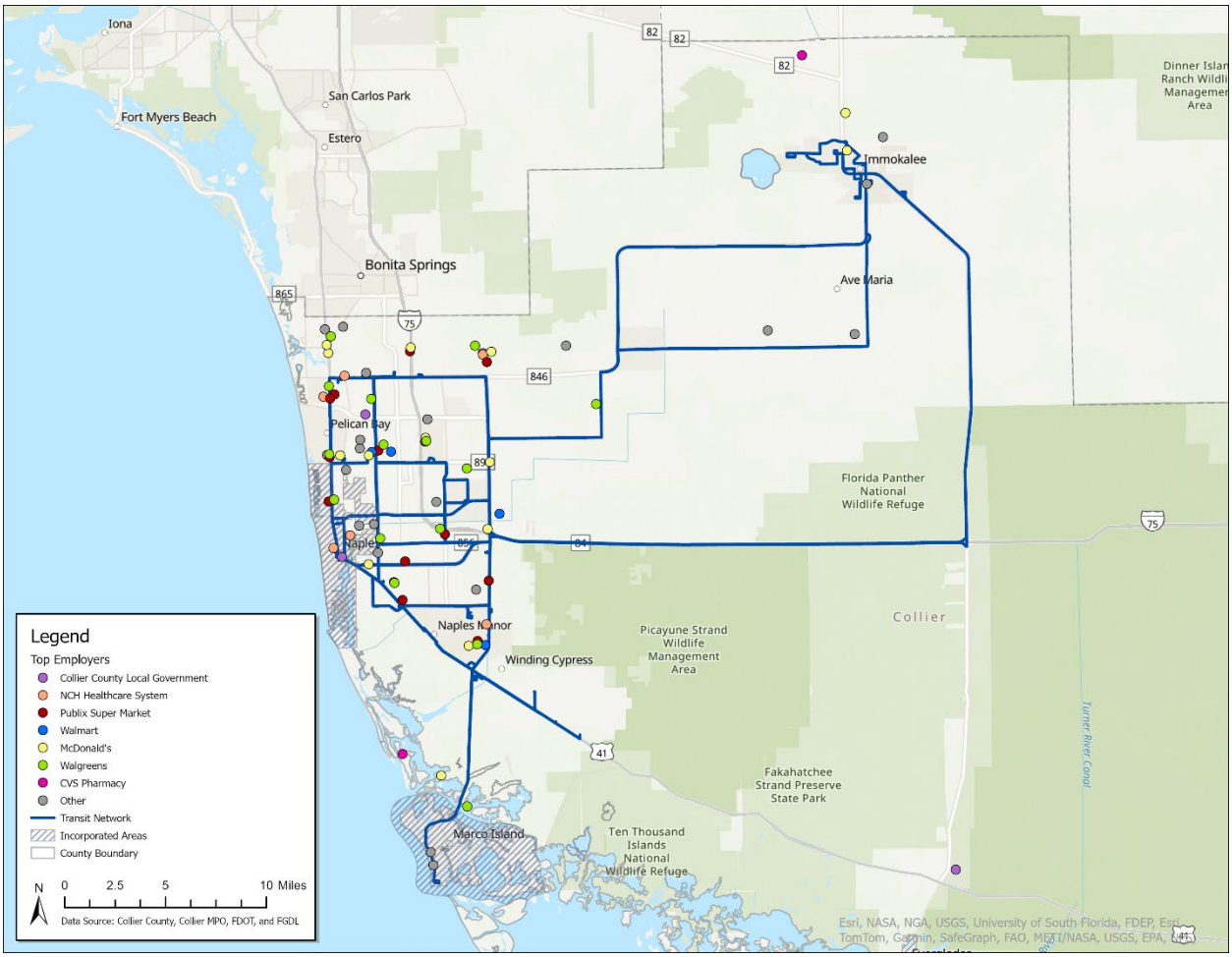


Figure 1-24: Transit Access to Top Employers in Collier County in 2023.

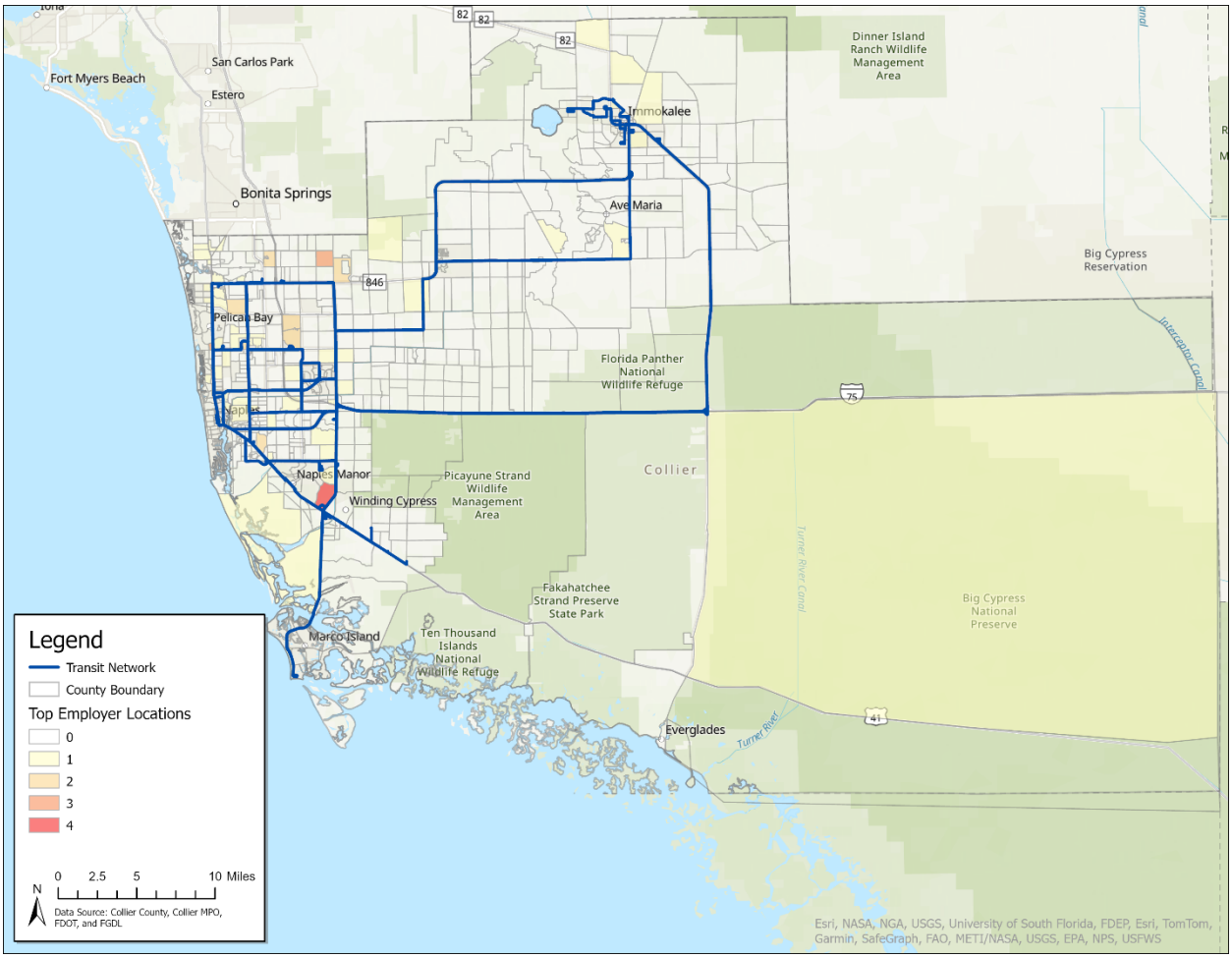


Figure 1-25: Density Map of Top Employer Locations by TAZ.

1.9 Major Developments

Table 1-4 shows the top 10 planned unit developments (PUDs) by acreage. Transit lines running adjacent to each proposed development are also outlined.

Table 1-4: Top Ten Planned Unit Developments in Collier County by Area.

Planned Unit Development	Acres	Transit
Town of Ave Maria SRA	5928	Routes 19/22/23
Marco Shores/Fiddler's Creek	4215	Routes 21/24/121
Lely Resort	2880	Routes 17/21/24/121
Heritage Bay	2562	Route 27
Sabal Bay	2518	Routes 13/14/24
Hacienda Lakes	2264	Routes 17/21/121
Pelican Marsh	2191	Routes 11/12/27
Orange Tree	2131	Routes 19/22
Pelican Bay	2114	Routes 11/25/29
Winding Cypress	1960	Routes 12/17/21/24/121

Source: Collier County GIS Hub.

Most of the proposed developments have transit services running adjacent to them. However, it is crucial to note that a significant portion of these developments are gated communities, which presents unique challenges for public transit access. Gated communities, which are prevalent in Collier County, often have restricted entry points and private roads that can limit direct access for public transit vehicles. Since most of these developments seek to expand residential areas, it will be important to ensure either an expansion of existing transit routes or the addition of new transit lines to serve these areas effectively. This may require innovative solutions to overcome the access limitations posed by gated communities.

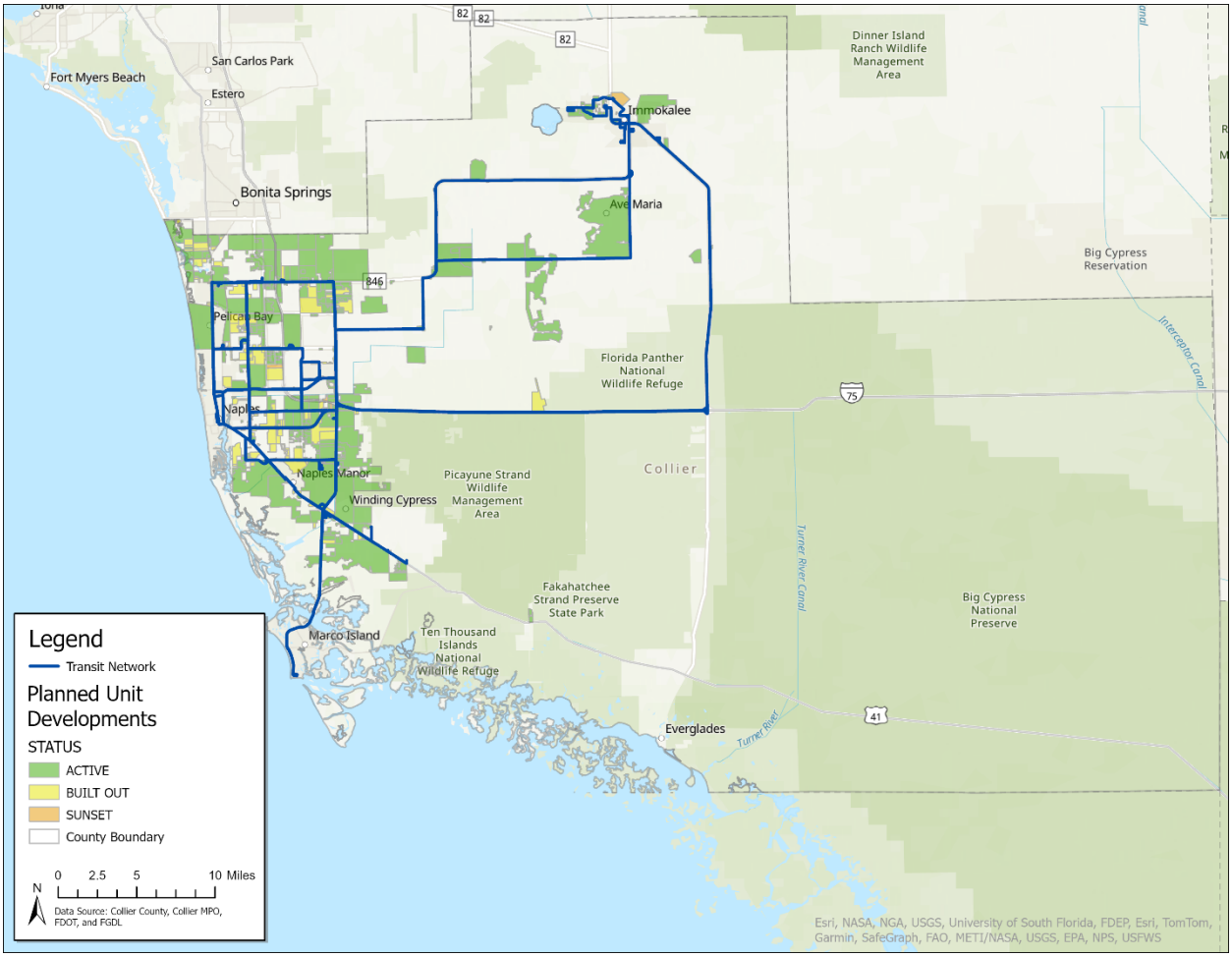


Figure 1-26: Status of Planned Unit Developments in Collier County.

Figure 1-26 shows the Developments of Regional Impact (DRIs) in Collier County as of May 3, 2024. These developments are noted for potential impacts on existing and future travel demand. The table shows which routes currently serve these developments in the existing CAT transit network as of May 3, 2024.

1.10 Existing and Future Land Use

With a fairly large land area, much of Collier County consists of agricultural land or park space. A significant portion of Collier County's land area is currently zoned for agriculture or open space (more than 90% altogether; 38% and 54% respectively). About 5% of the land area is zoned for planned unit development

(PUD), allowing for a significant amount of new or upcoming developments that would impact transit use and demand. Naples and Marco Island are both zoned as incorporated areas. The land use varies more in Immokalee and the urban communities surrounding Naples, including Palm River, Golden Gate, Fiddler's Creek and surrounding planned communities, and so on. Excluding agriculture, open space, PUD, and incorporated area zoning, these areas consist of 76% residential, 12% commercial, 9% industrial, and 3% civic and institutional zoned land.

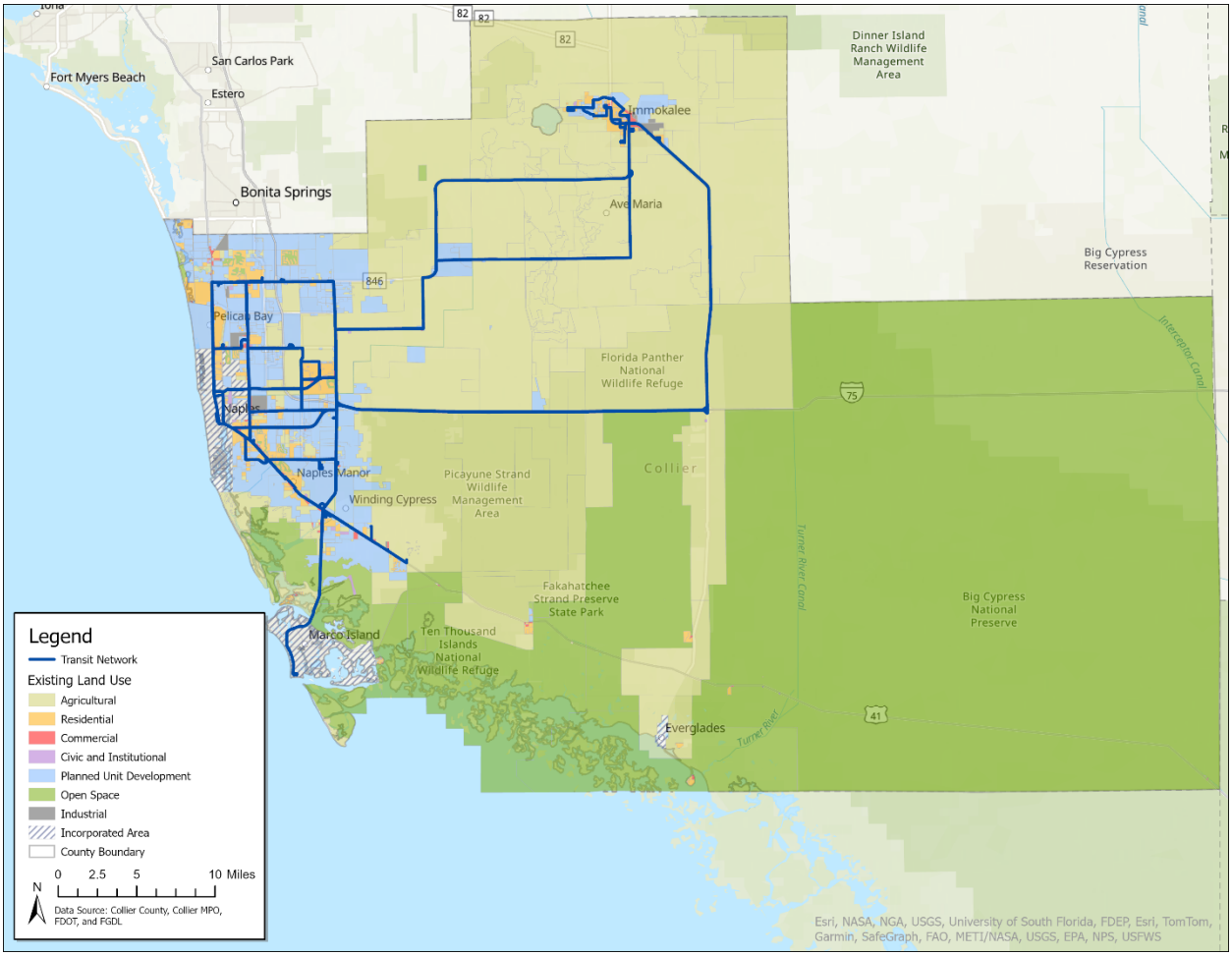


Figure 1-27: Existing Land Use Zoning Areas in Collier County.

As the County grows and develops, land use areas are redesignated consequently to accommodate development needs and purposes. In the County's future land use designations, open space or conservation designation areas are expanding, specifically in the Big Cypress National Preserve as it now includes the Florida Panther National Wildlife Refuge where it was previously zoned as agricultural land. A notable amount of agricultural land has been rezoned as rural or estates designation, which is defined as low density residential development with limited agricultural activities. The PUD areas are zoned as urban residential land. The future land use designation also adds a new category of mixed-use activity in replacement of commercial and civic and institutional zoning.

A more detailed breakdown of future land use designations shows that conservation continues to occupy the largest portion (59%) of the County's acreage. It is still followed by agricultural/rural uses at 18%, but at a significantly smaller percentage compared to existing agricultural area. Estate designation and

residential uses each constitute another 7% of the land. Noteworthy is the presence of sending and receiving areas, comprising of 3% and 2% of the land respectively, which serve as mechanisms to steer development away from environmentally sensitive regions towards designated growth areas.

Although the predominant land use remains focused on conservation and agriculture, mixed-use zoning holds immense potential for fostering transit-oriented development. Transit planning should prioritize serving receiving areas, ensuring that transit infrastructure supports the anticipated influx of development in these zones. Meanwhile, transit routes passing through sending areas should aim to minimize ecological impact and focus on connecting these areas to transit hubs and receiving districts.

Residential areas present opportunities for creating walkable, mixed-income neighborhoods that are well-connected to transit services. Transit-oriented design principles should be integrated into the planning and development of these areas, emphasizing pedestrian-friendly streetscapes, mixed-use zoning, and access to public transportation. Additionally, transit routes serving these neighborhoods should offer frequent and reliable service, catering to the diverse needs of residents across different income levels and demographics.

Figure 1-28 and Table 1-5 depict future land use designation in Collier County as of 2024. The figure shows more generalized categories of land use. The table includes more detail including finer subcategories of land designations along with percentage breakdowns for each designation, sorted by acreage.

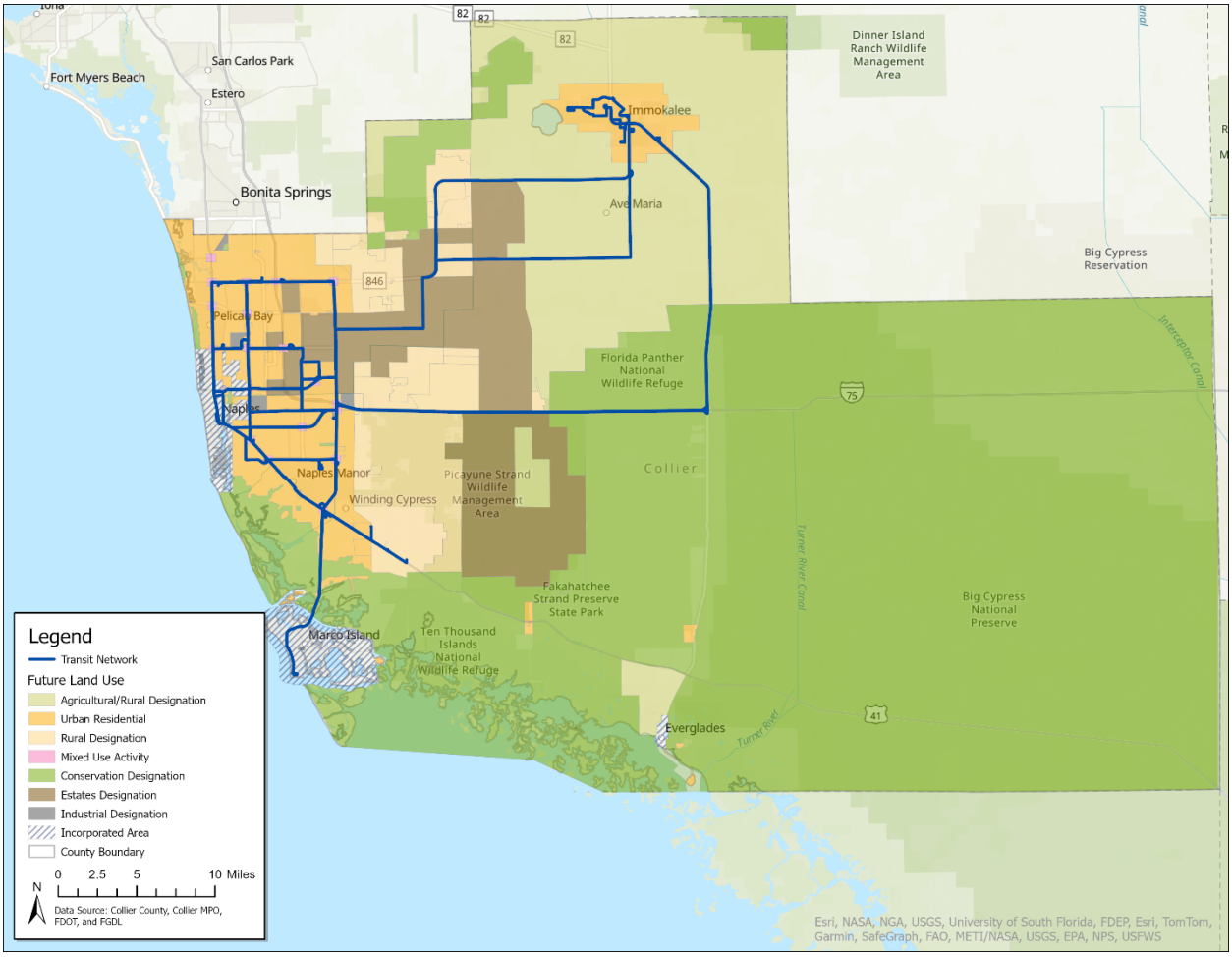


Figure 1-28: Future Land Use Designation in Collier County as of 2024.

Table 1-5: Future Land Use in Collier County.

Future Land Use	Acres	% of Area
Conservation	856,551	59%
Agricultural/Rural	257,645	18%
Estates Designation	101,302	7%
Residential Uses	95,936	7%
RF-Sending	44,843	3%
Incorporated Area	25,941	2%
RF-Receiving	22,672	2%
Urban Coastal Fringe Subdistrict	11,775	1%
RF-Neutral	8,836	1%
Mixed Use	3,079	<1%
Rural Settlement Area District	2,824	<1%
Immokalee Road Rural Village Overlay	2,778	<1%
Industrial District/Rural Industrial District	1,839	<1%
US 41 East Overlay	1,526	<1%
Bayshore/Gateway Triangel Redevelopment	1,190	<1%
Interchange Activity Center Subdistrict	454	<1%
Commercial	249	<1%
Livingston Rd/Veterans Memorial Blvd E Resi Subdistrict	36	<1%
Carman Drive Subdistrict	15	<1%
Orange Blossom/Airport Crossroads Comm'l Subdistrict	10	<1%
Corkscrew Island Neighborhood Coml Subdistrict	9	<1%
Ivy Medical Center Subdistrict	4	<1%
Total	**1,440,427**	**100%**

Source: Collier County GIS Hub.

1.11 Commuter Travel Patterns

Understanding mode choices of commuters is essential to understanding the frequency and need of transit options in Collier County. In Table 1-6, journey-to-work characteristics and commuter flow patterns were compiled based on Census data for residents 16 years or older.

Table 1-6: Journey-to-Work Characteristics.

Characteristic	2010	2020	2022
Place of Work			
Worked inside county	89.5%	89.3%	89.3%
Worked outside county	8.1%	8.4%	8.3%
Mode to Work			
Drive alone	75.3%	74.0%	74.0%
Carpool	12.3%	12.0%	10.9%
Public transit	1.6%	1.1%	0.5%
Walk	1.2%	1.1%	0.7%
Work at home	6.1%	9.4%	11.7%
Taxicab, motorcycle, or other means	2.5%	1.7%	1.7%
Travel Time to Work			
<10 minutes	11.6%	10.6%	10.0%
10-19 minutes	33.1%	29.7%	29.1%
20-29 minutes	24.2%	24.7%	24.9%
30-44 minutes	18.9%	22.2%	22.8%
45+ minutes	12.2%	12.8%	13.2%
Departure Time to Work			
6:00-8:59 AM	67.8%	65.9%	64.8%
Other times	32.2%	34.1%	35.2%

Source: 2010 5-year estimates, 2018 5-year estimates, 2022 5-year estimates.

As shown in Table 1-6, more people work inside the county. As time passes, less people use public transit or walk and more work at home. A consistent percentage of people drive alone (74-75%). Travel times to work remain consistent, although longer commute times are steadily increasing. Finally, a consistent number of residents (around 65-67%) leave for work between 6AM-8:59AM.

1.12 Roadway Conditions

Part of the baseline conditions assessment is the examination of existing roadway conditions. The conditions of the roads that a transit route operates on can significantly impact route run time and on-time performance, and in turn, implicate the efficiency of that route. Figure 1-29 depicts the conditions of major roadways in Collier County, including existing deficiencies (shown in red), projected deficiencies within five (orange) and ten years (yellow), and roads currently undergoing capacity enhancement projects (grey). The transit network has been overlayed on top, to show where the existing service may be impacted by the road conditions. A significant portion of the existing transit network appears to be operating on roads with existing deficiencies or are projected to be deficient within the next five years, especially around Naples, Pelican Bay, Orangetree, and along the roads towards Ave Maria and Immokalee. This indicates that transit service is highly impacted by the roadway conditions in these areas and will worsen in the next few years. Routes 13, 14, 19, 21, and 22 are especially impacted as large sections or most of the route lengths are along existing deficiencies (shown in red in Figure 1-29), The impact on Route 19 is particularly notable as it has high average monthly and annual ridership, as indicated in a later section. Routes 15, 16, 20, 21, 25, 27, and 121 may also need to be considered as some of the route lengths are along roads that are projected to be deficient in five to ten years, very few of the existing or planned capacity enhancement projects are

along the transit service roads. Improvements to the road conditions are highly suggested to improve transit efficiency along these roads.

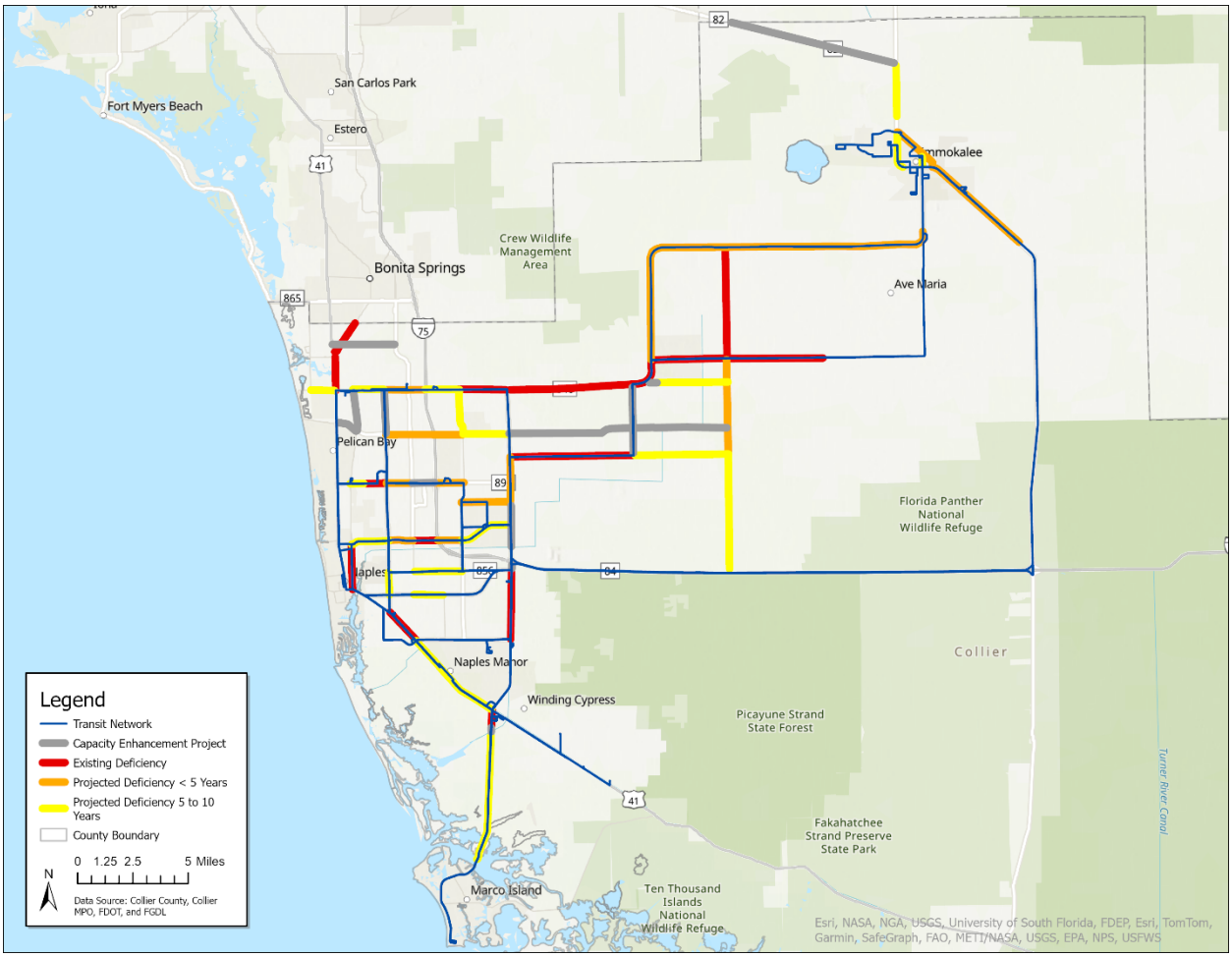


Figure 1-29: Existing and projected deficiency of Collier County roads (Source: Collier County 2024 Annual Update and Inventory Report (AUIR)).

Traffic conditions can also serve as an indicator for areas with potential need for alternative transportation modes in place of the private vehicle or additional public transit service, especially on routes towards popular destinations and major roads with high congestion levels. Figure 1-30 depicts the percent change in peak hour directional volumes on major roads from 2023 to 2024. The green lines represent a decrease in volume, meaning that there are less vehicles along those roads compared to 2023 conditions. The red lines depict the opposite, an increase in volume, indicating more vehicles compared to 2023 and potentially more congestion. Many of the roads with high increases in volume are already serviced by transit, especially around Naples, Pelican Bay, and Immokalee. This could indicate a need for more service along those roads. Other high volume increase roads are not yet serviced by transit, including Immokalee Rd, Randall Blvd, and Everglades Blvd N around the Orangetree community, as well as on Highway 29 from Miles City to Everglades. This could indicate a need for transit service to reduce vehicle volumes in those areas.

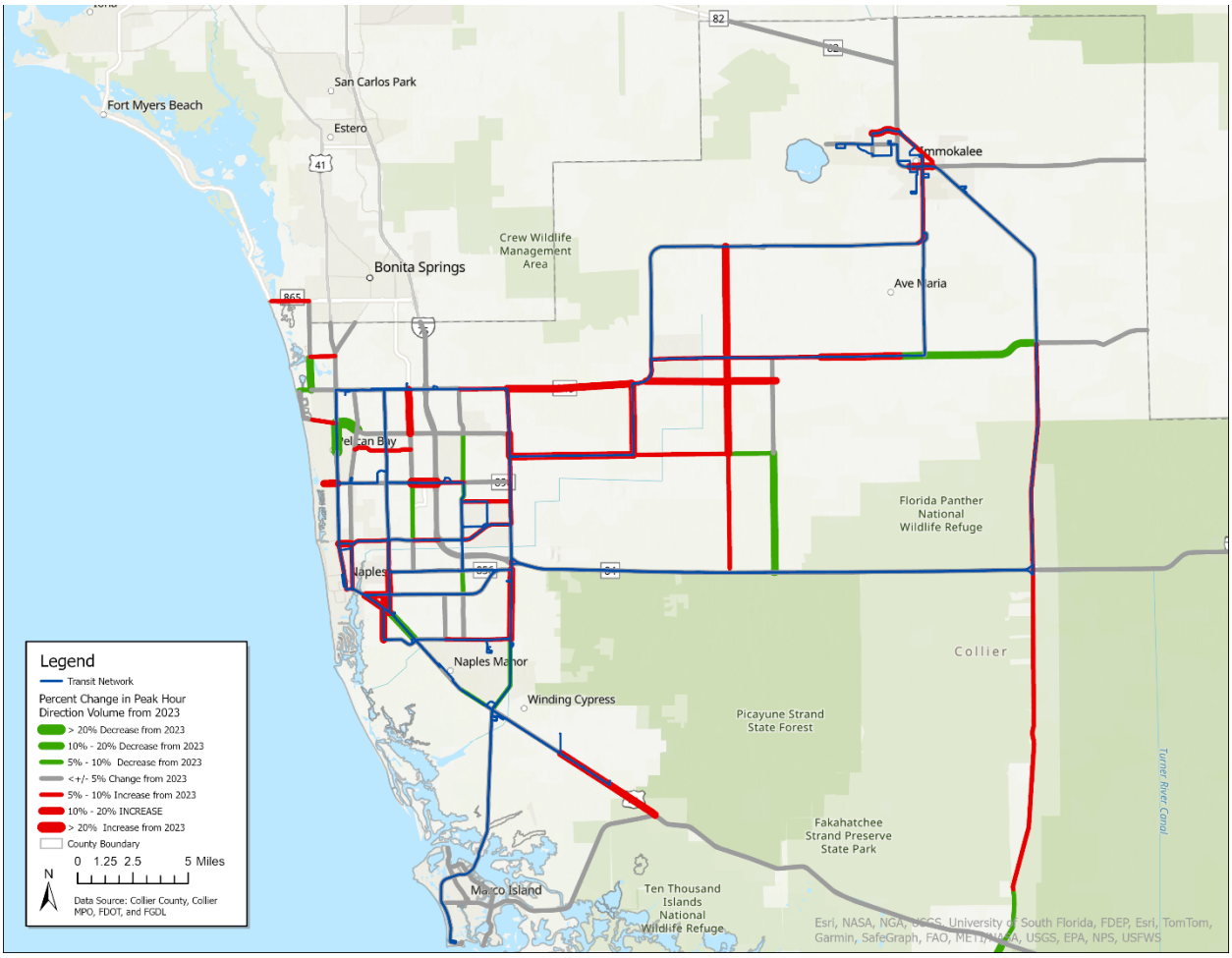


Figure 1-30: Percent change in peak hour direction volume on major roads in Collier County from 2023 to 2024 (Source: Collier County 2024 AUIR).

2 Transit Performance

This section evaluates transit services in Collier County, including an overview of current services, trend analysis, and peer comparison. It examines existing transit operations, infrastructure, and other key providers. Additionally, it reviews performance trends over the past five years and compares CAT service with peers using standard criteria.

2.1 Existing Transit Services

2.1.1 FIXED ROUTE SERVICES

As of 2024, Collier Area Transit (CAT) operates 16 existing fixed bus routes services that operate throughout Collier County. CAT's service area largely consists of the urbanized part of Collier County, including the City of Naples and the City of Marco Island. Unincorporated rural communities in the County that receive transit service include Ave Maria and Immokalee. Service is provided 7 days a week, all year round except for 6 holidays. Daily service typically begins between 5:30 AM and 6:00 AM and ends later

in the evening between 7:30 PM and 8:00 PM for most routes. No services are provided on major holidays, including Thanksgiving Day, Christmas Day, New Year's Day, Memorial Day, Independence Day, and Labor Day. In 2023, the service's annual ridership was 729,767. CAT routes 11, 12, and 27 connect to the LinC – Lee-Collier route, LeeTran's Route 600, a route providing transit connections between Lee County and Collier County. It is interlined with LeeTran's Route 240 and also connects to LeeTran Routes 140 and 240. Table 2-1 shows the existing transit lines in Collier County as of 2024.

Table 2-1: Existing Fixed-Route Services in Collier County.

Count	Route	Services
1	11	US 41 to Creekside Commerce Park
2	12	Airport to Creekside Commerce Park
3	13	NCH & Coastland Center Mall
4	14	Bayshore to Coastland Center Mall
5	15	Golden Gate City (Santa Barbara)
6	16	Golden Gate City (Santa Barbara)
7	17	Rattlesnake to FSW
8	19	Golden Gate Estates & Immokalee
9	20	Pine Ridge Road
10	21	Marco Island Circulator
11	121	Express Immokalee to Marco Island
12	22	Immokalee Circulator
13	23	Immokalee Circulator
14	24	US 41 East to Charlee Estates
15	25	Golden Gate Parkway & Goodlette - Frank
16	27	Immokalee Road

Source: CAT Website.

In addition to fixed-route services, CAT operates the Paradise Beach Trolley. This service runs every Friday, Saturday, and Sunday from mid-February to the end of April. It shuttles passengers from the Conner Park Parking Lot on Bluebill Avenue to Delnor-Wiggins Pass State Park and Vanderbilt Beach, operating from 8 am to 3 pm and from 4:30 pm to 7 pm. Figure 2-1 shows a map with the current transit routes in Collier County as of 2024.

Collier County transit services may be impacted by parking policy development that is currently under consideration. Florida's Senate Bill 102, known as the Live Local Act, is a policy that would consider reducing the provision of parking in order to promote more transit use. This policy has not yet been incorporated in Collier County's Land Development Code; however, it is undergoing consideration in the county's land development code sub-committees and may be implemented in the future.

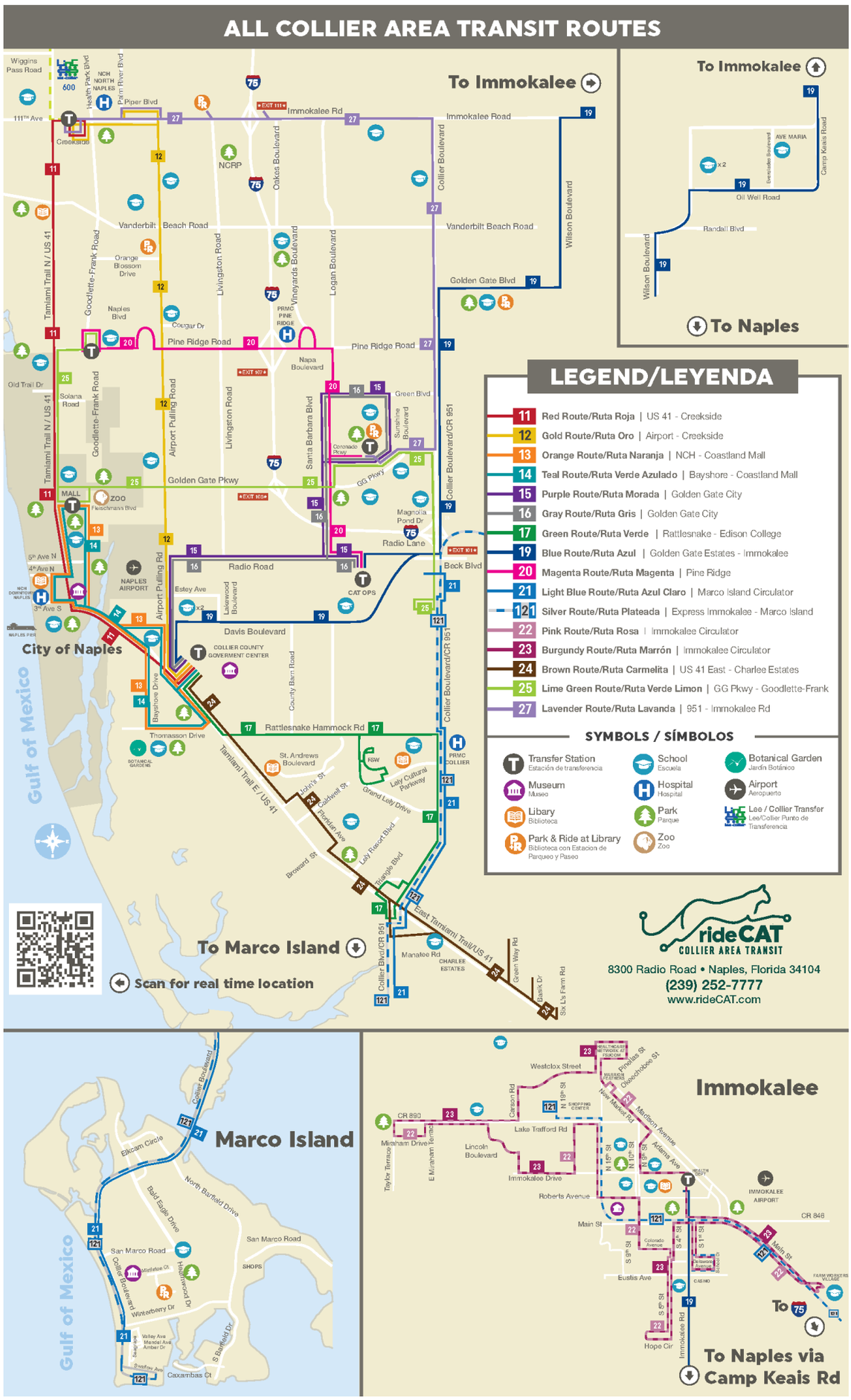


Figure 2-1: Existing CAT Services

2.1.2 PARATRANSIT SERVICES

Collier County also provides paratransit (shared ride, door-to-door) services through the CATConnect program with funding from the Florida Department of Transportation, Agency for Persons with Disabilities and Florida Commission for the Transportation Disadvantaged (TD). Those who qualify for CATConnect are primarily those under the Americans with Disabilities Act (ADA) as well as those who qualify as TD individuals. TD individuals are counted as those who because of a mental or physical disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to healthcare, employment, education, shopping, social activities, or other life-sustaining activities.

The CATConnect paratransit service is administered by Collier County Public Transit & Neighborhood Enhancement (PTNE) Division and provides shared, door to door transportation service for medical appointments, work, school and select other trips depending on the funding program requirements.

In the June 2024 CATConnect Paratransit Service Report, it was found that paratransit ridership was on an increasing trend, with a significant increase from 2022 to 2023 of 35.8%, see Figure 2-2. Collier County overall has 7% fewer vehicles than peer systems but higher passengers per trip compared to peer agencies.

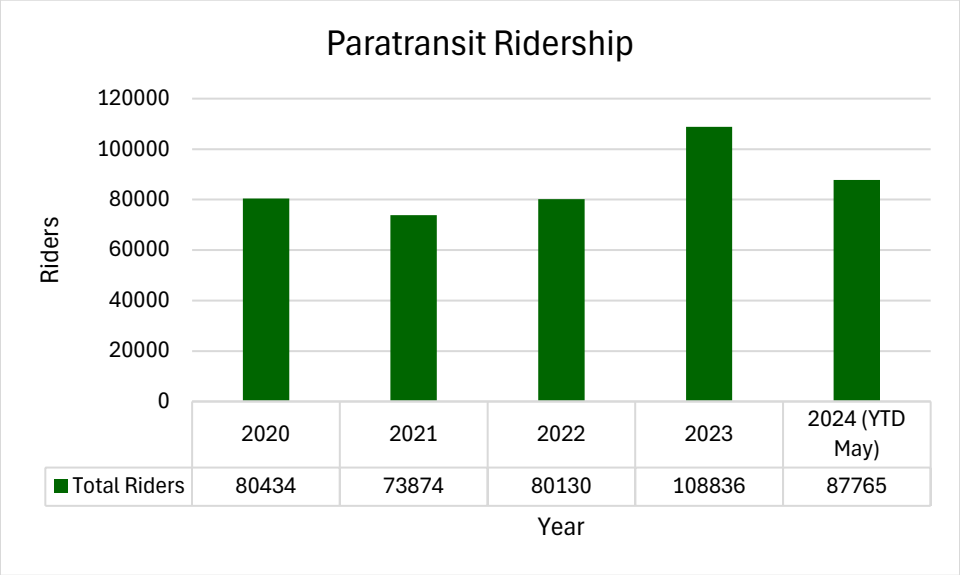


Figure 2-2: Paratransit Ridership

2.1.3 TECHNOLOGY SOLUTIONS

Collier County has several existing technology solutions and goals that will help the County prosper in the next 10 years.

2.1.3.1 IT Infrastructure and Management

Collier Area Transit (CAT) has a dedicated IT department responsible for managing both the physical and digital infrastructure of its transit services. This includes software development, maintenance, and ensuring data privacy and security.

2.1.3.2 Transit Development Plan and Mobility Initiatives

The 10-year Transit Development Plan identifies mobility-on-demand services as a top priority. In line with this, CAT started using Ecolane scheduling software for paratransit services in July 2021. This upgrade streamlined scheduling, dispatching, and real-time updates, significantly improving efficiency and service reliability.

2.1.3.3 Passenger Convenience and Mobile App Integration

In March 2022, CAT launched the CATconnect Mobile App. The app allows passengers to schedule, monitor, and manage trips seamlessly. Integrated with the CATCash fare system, it provides an account-based payment option that eliminates the need for cash transactions. The app also offers trip details and past journey records for user convenience.

Collier County also offers the Collier 311 App, which connects users to a variety of government services and information, including construction updates, waste services, and service requests.

2.1.3.4 Exploring Sustainable Transportation

In response to evolving demands, CAT is exploring the introduction of electric shuttles as a greener alternative to traditional buses. Additionally, CAT is considering ride-share-style services in specific areas to improve flexibility and accessibility.

2.1.3.5 Infrastructure Enhancements and Data Integration

Collier County's express lanes present an opportunity for conversion into BRT routes. The County's Transportation Management Services Department is key in planning and enhancing this infrastructure, working alongside the dedicated planning team to drive technological innovation.

CAT also maintains both static and real-time General Transit Feed Specification (GTFS) data, feeding into the Transit App service. Ongoing upgrades to CAD/AVL systems, Mobile Data Terminals (MDTs), Automatic Voice Annunciation (AVA) systems, and Automated Passenger Counters (APCs) are part of CAT's commitment to providing accurate data and seamless passenger experiences. These systems are integrated with the Mobile Ticketing Platform, powered by Masabi, and aligned with ITxPT standards to ensure a unified, efficient transit experience.

2.1.4 FARE STRUCTURE

As of 2024, CAT uses TripSpark fareboxes on all their transit vehicles which accept cash, reloadable smartcards, and paper transfer tickets. Mobile tickets for CAT buses can also be purchased on the RideCAT mobile application or Transit App. In the future, they will be working with LECIP fareboxes.

The fare structure as of 2024 is presented in Table 2-2.

Table 2-2: Fare Structure in Collier County (2024)

Fare Category	Fare	Reduced Fare
One-Way	$2.00	$1.00
Children 5 years of age and younger	Free	Free
Marco Express	$3.00	$1.50
Transfers – up to 90 minutes	Free	Free
Day Passes	$3.00	$1.50
Smart Card Pass		
15-Day Pass	$20.00	$10.00
30-Day Pass	$40.00	$20.00
Marco Express 30-Day Pass	$70.00	$35.00
Discounted Pass		
Summer Paw Pass (Valid June 1 – August 31 for students. Price includes Smart Card)	$30.00	
30-Day Corporate/Perk Pass (300+ Employees)	$29.75	
Smart Card Media Fees		
Smart Card	$2.00	
Registration	$3.00	
Replacement with Registration	$1.00	

Source: rideCAT website; Collier County

The Reduced Fares are for members of Medicare, Disabled Community, those 65 years and older, children 17 and under, high school and college students and active / retired military personnel. ID is required. This fare would also apply to the subcontracted transportation provider with the Florida Commission for the Transportation Disadvantaged that provides transportation services under the non-emergency transportation Medicaid Contract for Collier County. Discount Passes are for people eligible under the identified programs.

2.1.5 TRANSIT FACILITIES

2.1.5.1 Passenger Transfer Stations

There are currently two passenger transfer stations and five passenger transfer points provided on the CAT system. The first transfer station located at the Mobi Transfer Station, also known as the Radio Road Transfer Station, which is located at 8300 Radio Road in Naples as shown in Figure 2-3. This building is also a facility for the CAT Connect Paratransit program. At this facility, bus operations and bus transfers occur.



Figure 2-3: CAT Radio Road Transit Facility (Source: Google Street View)

The second passenger transfer station operated by CAT is the Government Center Transfer Station located at 3355 Tamiami Trail in East Naples, as shown in Figure 2-4 below, which accommodates pedestrians, cyclists, and "kiss-and-ride" passengers that are briefly either picked up or dropped off. This location provides in-person customer service, schedules, and pass sales, and is served by routes 11-17, 19, 22, and 24. Although parking is free, it is not an official park-and-ride site. The facility includes a busway with a turn-around, six sawtooth bus berths, a passenger platform with benches and trash receptacles, restrooms, snack machines, an air-conditioned lobby, and a customer service area with an informational kiosk.



Figure 2-4: Intermodal Transfer Station (Source: Google Street View)

Collier County plans to build a third transfer facility in the Immokalee Community on a vacant parcel owned by the county, with the plans currently underway and scheduled for completion in the fall of 2024. The

proposed site, approximately 1.7 acres in size, is currently a grass field adjacent to a green wooded area. It features an asphalt/concrete driveway providing access to the Health Department and a maintenance shed. The bus transfer station will enhance passenger and transit efficiency with new bus bays, canopy-covered shelters for passengers, a waiting platform with benches and trash receptacles, vending machines or options for food trucks, restroom facilities for passengers and drivers, and ADA improvements. Currently, passengers transferring at this location use a shelter located in a parking lot shared by visitors to the Health Department, County Library, and the David Lawrence Center.

Other transfer point locations within Collier County include Walmart Plaza; Pine Ridge and Goodlette-Frank Rd (Magnolia Square Plaza); Coastland Center; Creekside (Immokalee Road); and the Health Department in Immokalee. CAT also has dedicated parking spaces at the Orange Blossom Library, Golden Gate Parkway Library, Golden Gate Estates Library, Marco Island Library, and Immokalee Library.

2.1.5.2 Park-and-Ride Locations

There are currently four park-and-ride locations around Colier county. They are free to park in and operate from 5 A.M. to 9 P.M. on all days of the week, however, overnight parking is prohibited. Table 2-3 below lists the four park-and-ride locations along with the address of the lot, the number of parking spots provided, the nearest bus stop number, and connecting bus routes. Figure 2-5 depicts a map of the park-and-ride locations along with the CAT transit system.

Table 2-3: Park-and-ride locations and connections.

Name	Address	# of Parking Spots	Nearest Stop	Connecting Routes
Livingston Park and Ride	Livingston Rd/Immokalee Rd	20	682	27
Park and Ride at Orange Blossom Library	2385 Orange Blossom Dr	5	101	12
Park and Ride at Golden Gate Public Library	2432 Lucerne Rd	5	564	15, 16, 20, 25, 27
Park and Ride at Estates Library	1266 Golden Gate Blvd W	5	278	19

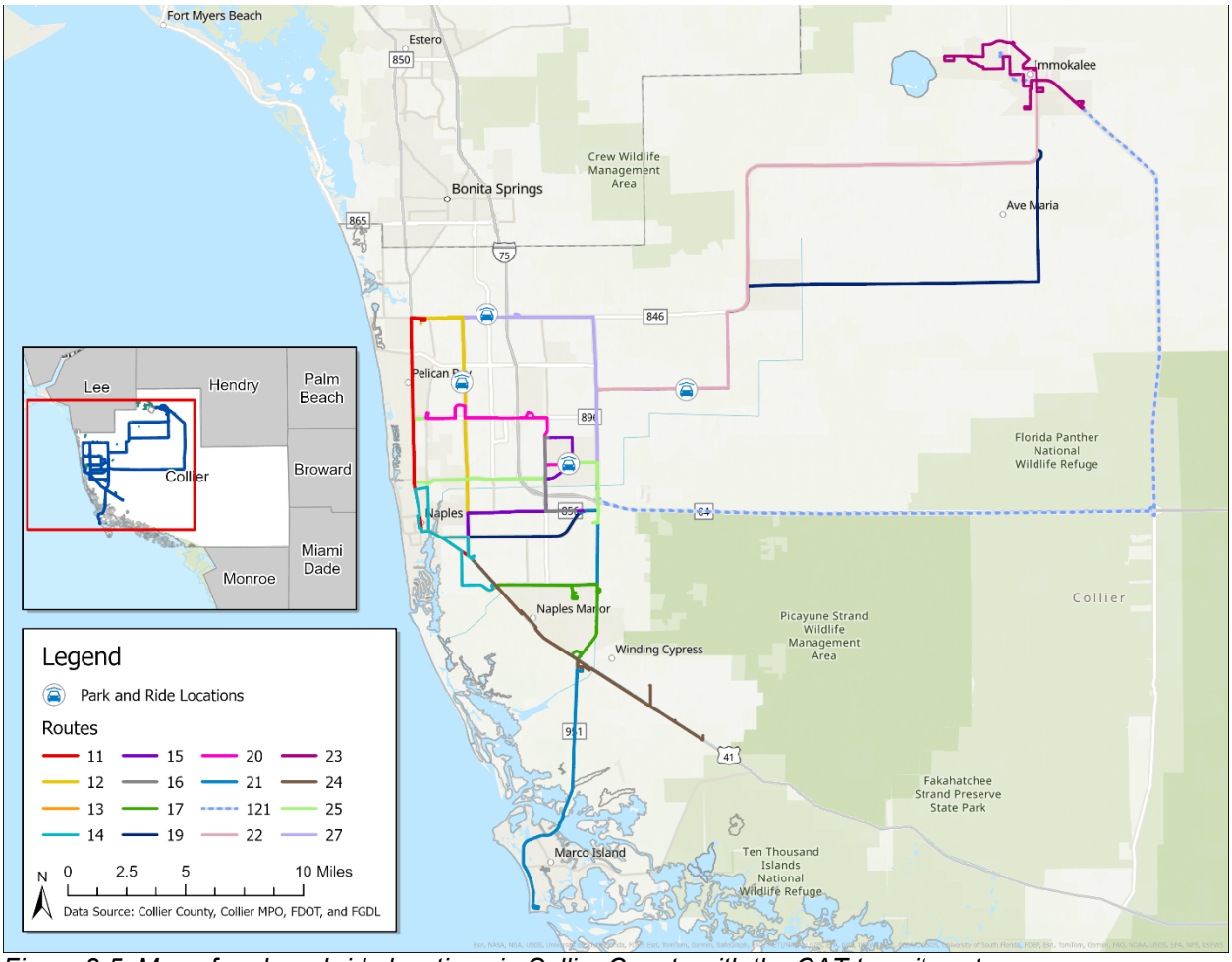


Figure 2-5: Map of park-and-ride locations in Collier County with the CAT transit system.

In addition, the 2020 Park and Ride Study identified and prioritized sites for potential park and ride facilities. These facilities are designed to provide areas where commuters can park and access public transit, carpools, or vanpools, helping to address traffic congestion and parking constraints. The locations of these areas include Creekside, the Government Campus, Coastland Center Mall, Freedom Square, Physicians regional, the Golf Course near VA Hospital, Immokalee Health Department, Beach Lot at Pine Ridge Road, and Radio Road Transfer.

2.1.6 VEHICLE INVENTORY

Table 2-4 below provides a summary of the 74-vehicle fleet at CAT, with a breakdown by make and model and some key statistics. These 74 vehicles include those used for fixed-route public transit services, paratransit services and support vehicles. The fixed route fleet increased by 17% from 2013 when there were 29 vehicles, compared to 34 currently. It is understood that even with this fleet size expansion, CAT still currently struggles to provide the services required, which is likely due to the large service area that the agency serves.

The age of the fleet generally can be considered quite near the end of life, with the average expected date of retirement only 2 years away in 2026 with many already being beyond their expected retirement age.

Table 2-4: CAT Vehicle Inventory 2024

Make	Model	Vehicle Type	Number of vehicles	Average Miles/Yr	Average Cost	Average % Federal funding	Average Expected Date of Retirement
CHEVROLET			**5**	**42,893**	**$105,141**	**80%**	**2021**
	Glaval	D	5	42,893	$105,141	80%	2021
FORD			**33**	**47,160**	**$77,985**	**81%**	**2026**
	Challenger	D	15	51,191	$79,663	75%	2025
	Escape	F	1	6,543	$23,170	100%	2031
	F-150 XL	G	1	28,897	$21,888	100%	2029
	F-150 XLT	G	1	22,859	$26,200	92%	2028
	Glaval	D	4	58,034	$83,093	80%	2023
	Impulse	D	6	66,666	$82,161	80%	2026
	Taurus SEL	F	1	6,080	$26,667	73%	2029
	Transit	F	2	24,053	$22,874	100%	2030
	Villager 7.3L V8	C	2	21,902	$204,781	100%	2032
FREIGHTLINER			**1**	**25,265**	**$138,632**	**90%**	**2028**
	Legacy	C	1	25,265	$138,632	90%	2028
GILLIG			**31**	**63,453**	**$433,013**	**98%**	**2028**
	G27B102N4	A	10	69,016	$393,761	98%	2026
	G27D102N4	A	3	84,276	$410,091	98%	2026
	G27E102H2	A	4	24,542	$476,193	100%	2035
	G27E102N2	A	12	68,768	$440,861	96%	2031
	G30B102N4	A	2	50,336	$530,207	100%	2022
VPG			**4**	**18,749**	**$50,173**	**80%**	**2020**
	MV1	F	4	18,749	$50,173	80%	2020
Total System			**74**	**51,866**	**$227,864**	**88%**	**2026**

(Source: Collier Area Transit Vehicle Inventory Report-1st Half February 2024)

2.1.7 SAFETY

There is not much discussion of safety and security in any of these documents. It is a required expenditure under the FTA grants. Annually 5307 grants must commit 1% of their federal allocation to safety and security improvements.

2.2 Other Transportation Service Providers

Although the LinC bus route provides commuter service between the Collier and Lee counties by connecting riders to local bus service in both counties, there is a lack of regional public transportation that provides

intercity commuter service. Additional transportation services such as van pooling programs and private bus companies help to bridge the gaps in terms of regional connectivity to destinations further afield. The Commute Connector program is a vanpooling service in Collier County, offered through a partnership with the Florida Department of Transportation (FDOT) and operated by Enterprise. Table 1-1 below shows the vanpool statistics from the FY2023 FDOT Report for the Commute Connector Program in Collier County.

Table 2-5: Vanpool performance statistics in Collier County for FY2022, FY2023, and projected FY2024.

			Average Per Vanpool, Per Month		
	Number of Vanpools	Average Number of Riders (including driver)	Revenue Miles	Passenger Miles	Operating Cost
FY2022	23	5.53	1,901	10,515	$1,089
FY2023	19	5.13	1,766	9,056	$1,183
Projected FY2024	29	5.13	1,766	9,056	$1,183

Services offered by private intercity bus companies, including Greyhound, RedCoach, and FlixBus, can both complement and/or compete with public transportation services. The private bus companies in Collier as listed above provide transportation services with connections to major cities in Florida. They typically provide direct service to Fort Myers, Sarasota, Tampa, Fort Lauderdale, Miami, and so on, as well as further cities such as Orlando and Tallahassee. The station stops for all Greyhound, RedCoach, and Flixbus services is located at 8845 Davis Boulevard. It is accessible by CAT route 19 as shown in Figure 2-6. Collier County is currently working to establish an exclusive facility use agreement to lease space to Flixbus at the Collier Area Transit Transfer Station. This would allow Flixbus to conduct bus transportation operations on the station premises and allow their staff and customers to use the onsite parking spaces, public restrooms, and customer boarding, alighting and waiting areas. Although agreement has not yet been reached, it should be kept in consideration as a potential source of revenue for Collier County and CAT.

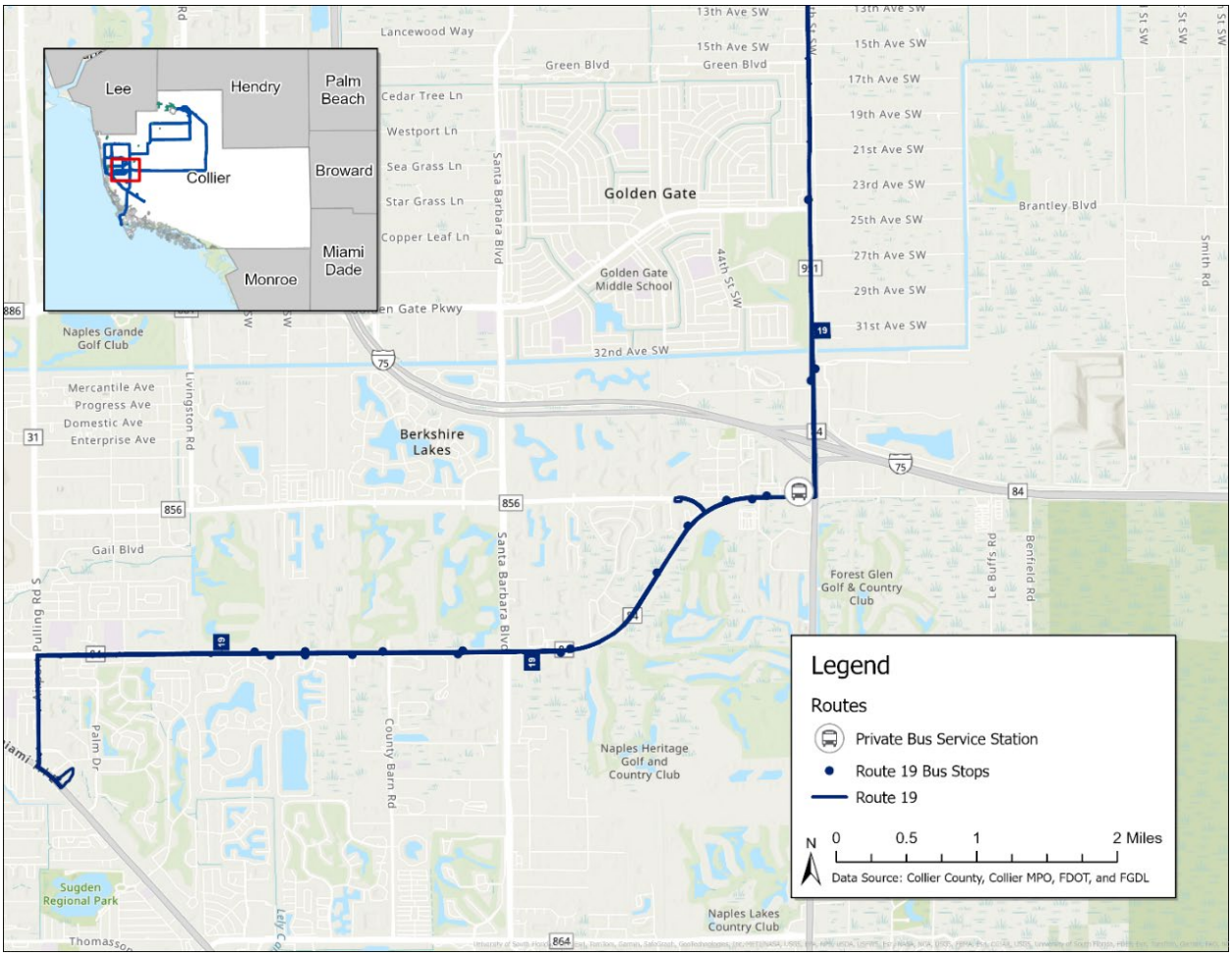


Figure 2-6: Station location for private bus service and Park and Ride locations along transit network.

2.3 Comprehensive Operations Analysis 2021 - Recap

The purpose of a Comprehensive Operations Analysis (COA) is to review the transit network and assess how best the agency can improve services and efficiency, particularly in relation to day-to-day operations. This assists with increasing value for the agency and ensuring that the transit system is as effective and efficient as possible in the short term. Generally, the COA is thought of as feeding into the TDP where the TDP sets the longer-term strategic goals and identifies the needs to help the transit system grow, evolve and improve over time.

The COA conducted in 2021 analyses the fine details of the transit operations, assessing elements such as service enhancements and optimization. This can include repurposing routes, moving service from less productive areas and routes, and enhancing well performing routes.

The key takeaways in relation to route optimization from the extensive analysis undertaken in the COA that have been implemented to date are summarized below. The recommendations that were implemented were the ones that were deemed to be cost neutral:

- Elimination of Route 12B – low productivity and requires additional bus.

- Route 17 and 18, which followed similar alignments, were consolidated into the current Route 17.
- Re-alignment of Route 19 - Maintain service on Collier Boulevard and Immokalee Road with select trips to Ave Maria via Oil Well Road.
- Route 21 alignment changes – maintaining service on Collier Boulevard between Marco Island and Walmart but removing service on San Marco Road. Additionally consolidated with Route 28.
- Route 25 alignment changes – A low ridership route moved to travel on US41 between Pine Ridge Road and Golden Gate Parkway. Removing service on Collier Boulevard and Goodlette Frank Road.
- Removal of Route 28 – consolidating Route 28 with Route 19.
- Route consolidation of 20 and 26. Routes 20 and 26 were the two lowest performing routes in terms of trips per revenue hour. By combining, all day service can be provided at 90minute frequency.

2.4 Transit Usage

2.4.1 ROUTE RIDERSHIP BY MONTH

Trends for the FY2020-FY2023 years are assessed in this section. Only routes active in 2024 are displayed in the graphs below. Ridership per month from the most recent full financial year is presented below in Figure 2-7 below.

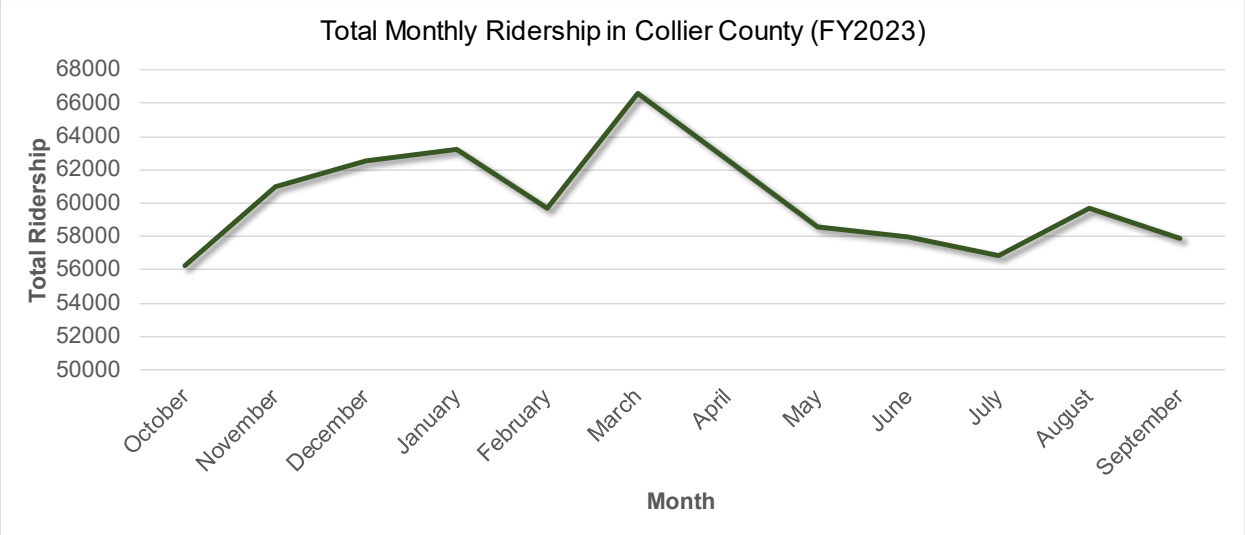


Figure 2-7: Total Monthly Ridership in Collier County during FY2023

As seen from the graph above, total ridership peaks in the holiday season (December-January) and March. Ridership then dips starting in May as the peak tourist and visitor season declines. This trend could indicate that more tourists are populating the buses during the peak seasons.

Figure 2-8 displays the total ridership for each route throughout the 2023 fiscal year.

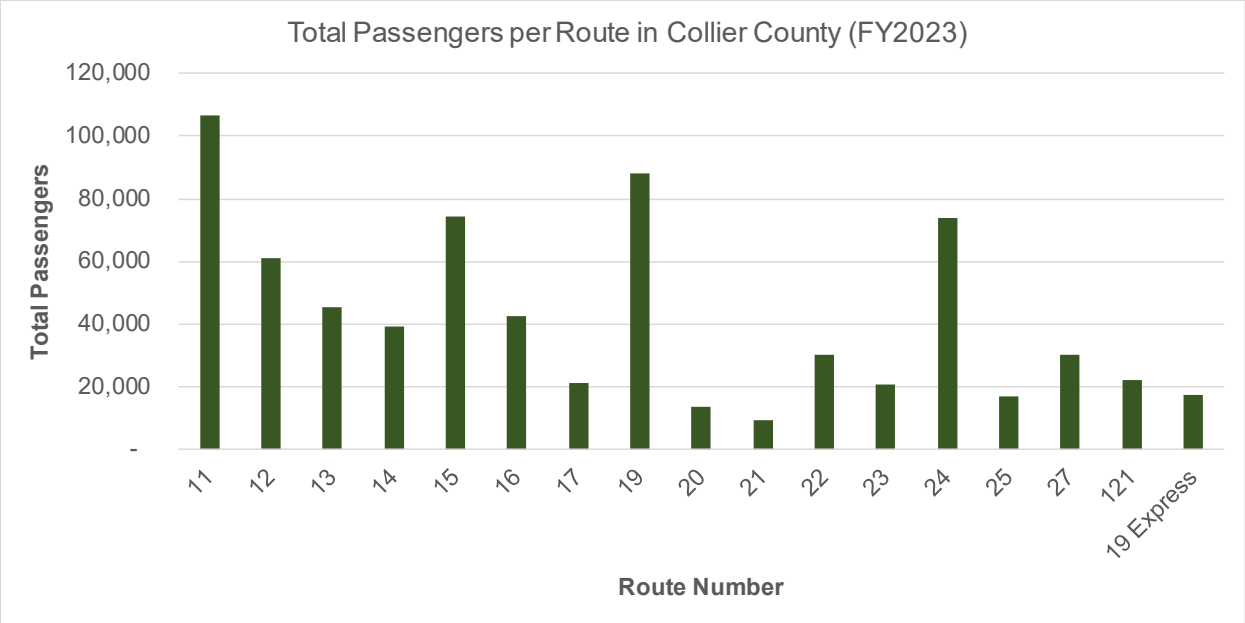


Figure 2-8: Total Passengers per Route in Collier County during FY2023

When examining the total number of passengers per route, Routes 11, 19, and 24 are the three most well-used routes. This is logical, as Route 11 passes through the Central Business District (CBD) in Naples, Route 19 is the only route connecting Immokalee and the downtown, and Route 24 serves the Collier County Government Center (although noted that other Routes do also serve the government center as well). In contrast, Routes 20, 21, and 25 are the least used routes, presenting opportunities to reroute or merge them to better accommodate demand.

Figure 2-9 below shows a graph of the passengers per revenue hour in Collier County.

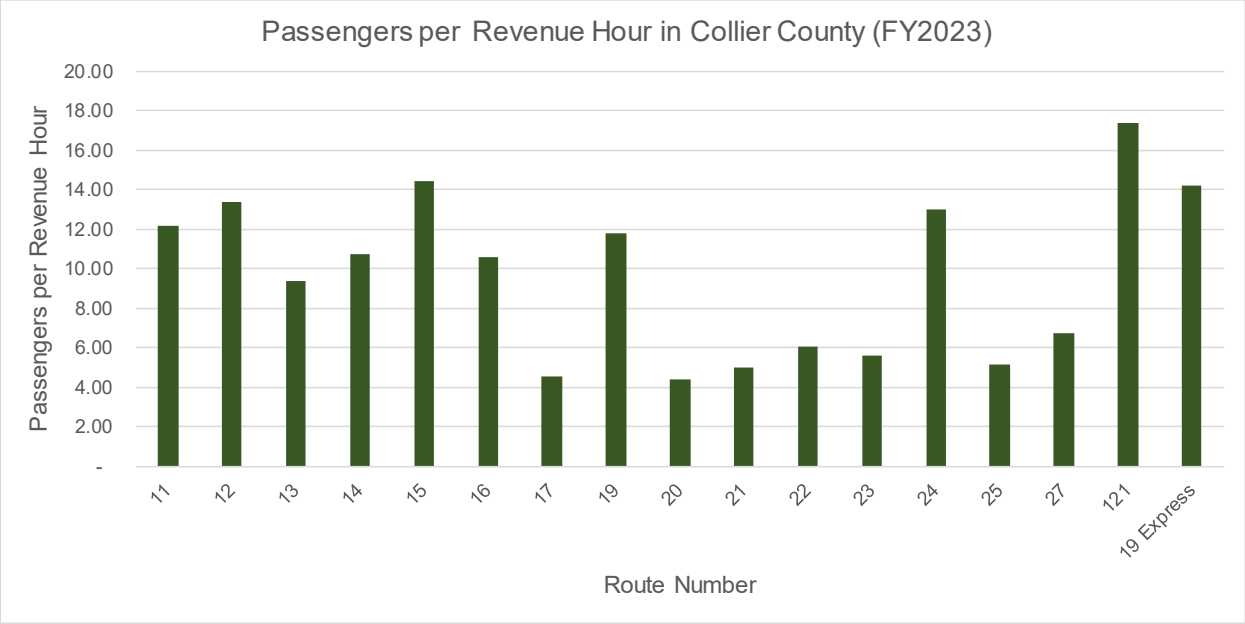


Figure 2-9: Passengers per Revenue Hour in Collier County during FY2023

Routes 121, Route 19 Express and Route 15 have the highest number of passengers per revenue hour, indicating that these routes may serve areas with higher transit dependency or demand and have schedules and frequencies of these routes likely align well with passenger needs. Routes 17, 20 and 21 have the lowest passengers per revenue hour. CAT might consider reallocating resources from low-performing routes to high-performing ones or to support the high-performing routes with increased frequency or extended hours. There may be opportunities to adjust the low-performing routes to better serve potential riders or connect to more popular destinations.

In Figure 2-10 below, ridership was averaged by season to determine seasonal variations for each route.

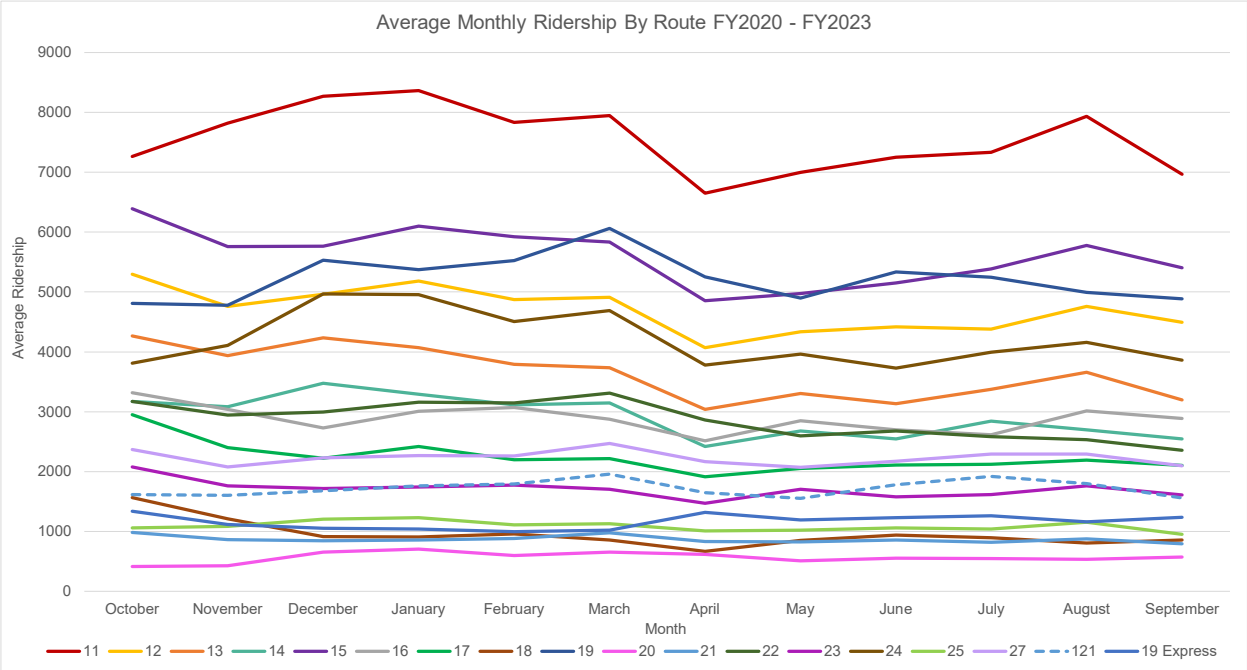


Figure 2-10: Seasonal Variation of Average Monthly Ridership

Other than Route 29, which is the beach shuttle with ridership only during the winter, most routes do not show significant seasonal variation. Route 29 also has lower ridership compared to other routes. Despite winter being a peak tourist season, the lack of significant ridership fluctuations suggests that tourists and seasonal residents may not be heavily utilizing the public transit system. This could be due to several factors like higher spending power of tourists visiting a wealthy area like Collier County. While ridership in the winter tends to be slightly higher than in the later months, promoting transit use among visitors and residents requires improvements to the accessibility and visibility of transit information. For instance, offering a transit pass could incentivize visitors to use the public transportation system, this pass could provide discounts for group travel and even cover multi-modal options if possible.

Figure 2-11 and Figure 2-12 highlight the routes with the highest ridership and riders per revenue hour, focusing on those within or near the core of the city, such as Naples or the Naples Airport. Notably, routes 11, 12, 15, 19, 24, and 121 were selected for this analysis for these reasons.

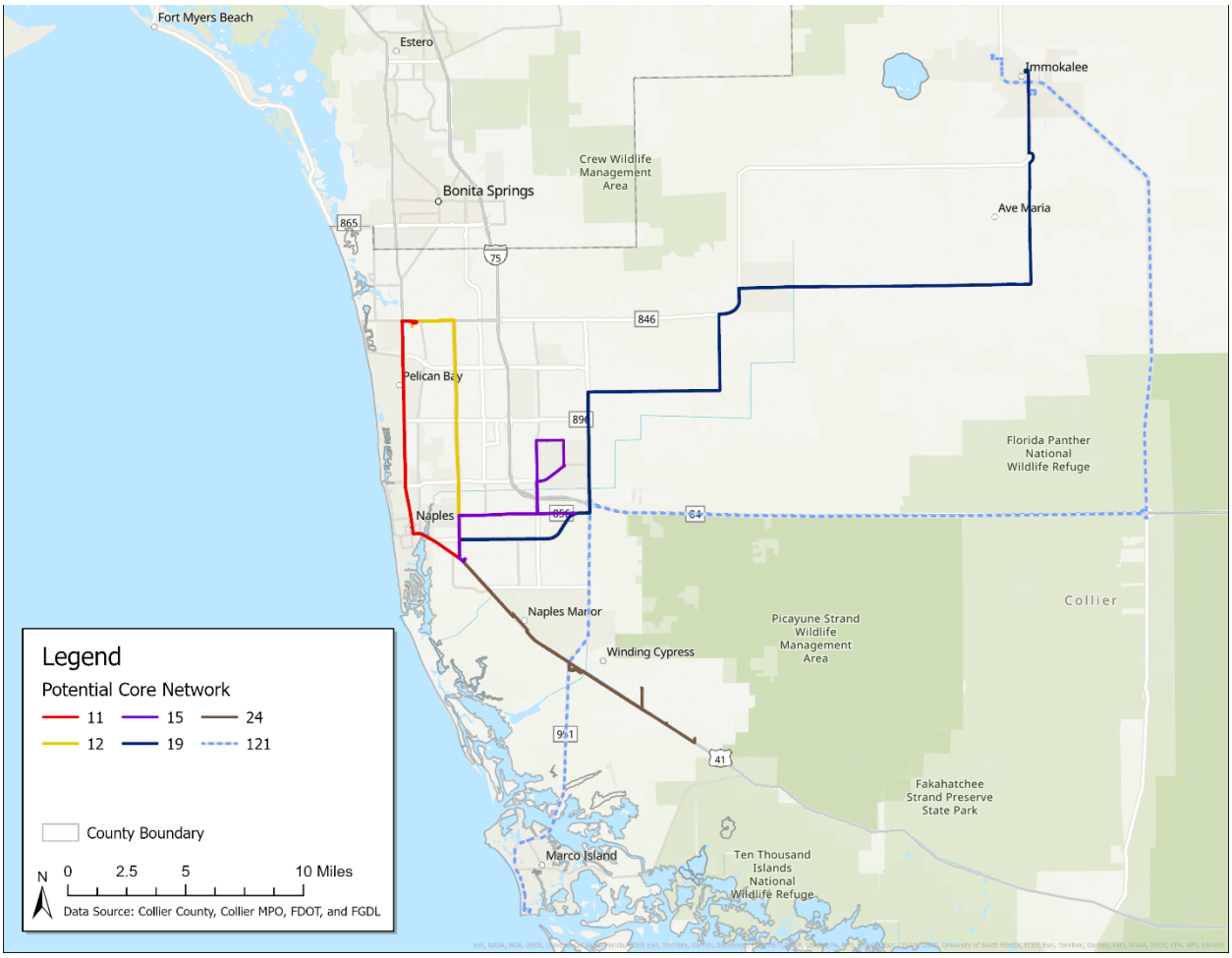


Figure 2-11: Top Ridership Routes in Collier County in FY2023

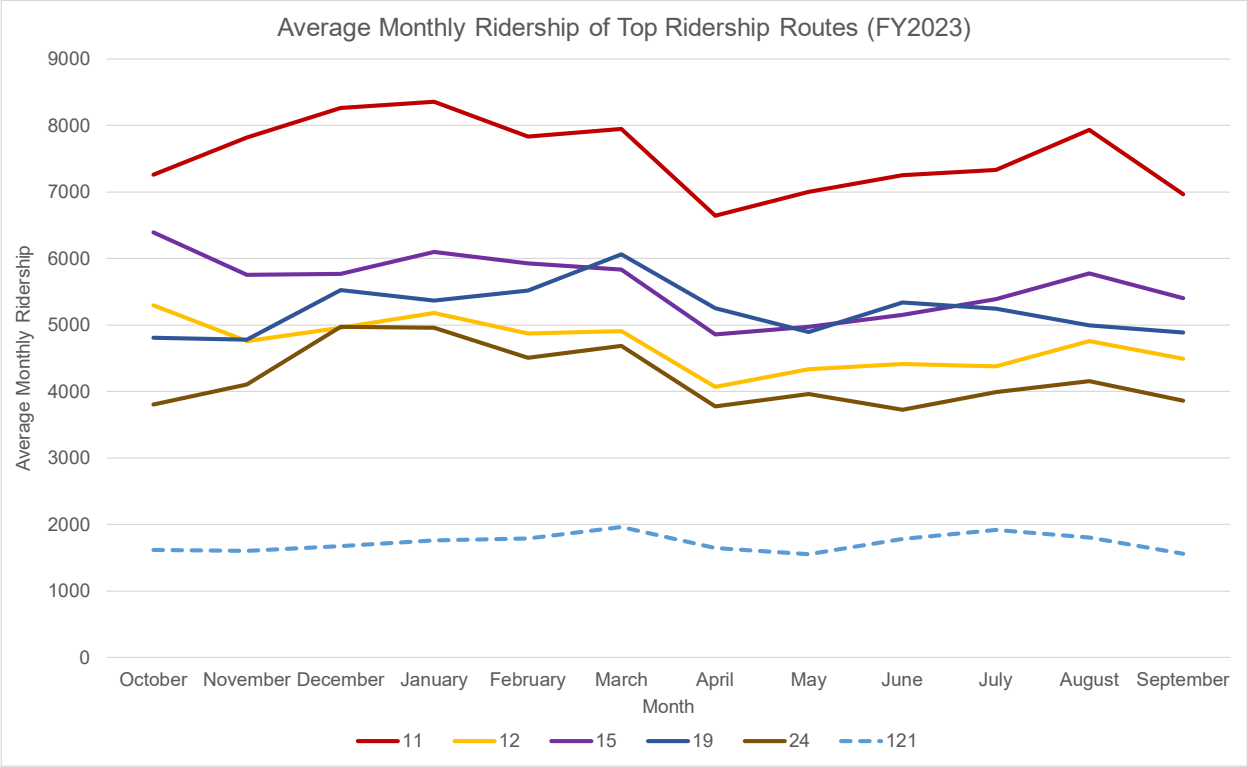


Figure 2-12: Average Monthly Ridership of Top Ridership Routes in Collier County in FY2023

The ridership pattern for these potentially "core" routes is highest between October to February, during the winter season. Ridership dips in April at the end of the peak tourist season. The ridership pattern suggests that tourists and seasonal residents may be contributing to increased usage of these core routes during the peak winter season. This aligns with the general tourism patterns in Collier County.

2.4.2 FAREBOX RECOVERY

For 2022 financial year, the overall farebox recovery ratio for the CAT system is 8%, derived from the ratio between the total fare revenue and total operating cost values from NTD data. This represents a 20% decrease (2 percentage points) from FY2018 farebox recovery ratio of 10%.

2.4.2.1 Recent Fare Studies and Changes for Upcoming Years

Following the fare study completed in 2018, the current fare structure for CAT is still in line with the approved changes from that study which are shown in Table 2-6 below. CAT plans to conduct another fare study in FY2025.

Table 2-6: Fare Structure in Collier County (2024)

Fare Category	Fare	Reduced Fare
One-Way	$2.00	$1.00
Children 5 years of age and younger	Free	Free
Marco Express	$3.00	$1.50
Transfers – up to 90 minutes	Free	Free
Day Passes	$3.00	$1.50
Smart Card Pass		
15-Day Pass	$20.00	$10.00
30-Day Pass	$40.00	$20.00
Marco Express 30-Day Pass	$70.00	$35.00
Discounted Pass		
Summer Paw Pass (Valid June 1 – August 31 for students. Price includes Smart Card)	$30.00	
30-Day Corporate/Perk Pass (300+ Employees)	$29.75	
Smart Card Media Fees		
Smart Card	$2.00	
Registration	$3.00	
Replacement with Registration	$1.00	

Source: rideCAT website; Collier County

In March 2024, CAT conducted a regional service and fare study with the aim of evaluating how best to serve the regional transit demands in conjunction with LeeTran (Lee County Transit) which included an evaluation of the most appropriate fare structure to deploy. This fare policy analysis evaluated the benefits and drawbacks of having a joint fare structure with LeeTran or having a separate structure.

The culmination of this review concluded that it would be better to maintain a separate fare structure for the regional services. This means each agency charges their own fares and keeps the revenues on their own vehicles as this provides the most cost-effective solution at this time as there is only one regional service with only one additional service proposed.

A zero-emissions fleet transition plan is underway and anticipated to be completed in 2025.

2.4.2.2 Strategies to Improve the Farebox Recovery

There are a number of different strategies that can be used to increase the farebox recovery ratio in order to make the transit system more cost effective. These include:

- Increasing ridership:
    - Prioritizing higher ridership of routes, by making sure they serve areas of high demand and as well as major activity centers to increase the number of riders and therefore the revenue being generated.
    - Increasing the accessibility of the fixed route transit network to encourage and enable TD and ADA passengers to be able to use the fixed route system.
    - Attract new riders through increasing frequency of services and increased marketing and communications of the benefit of transit. Note that when increasing services, it would be important to secure additional funding from other potential sources so as not to increase the cost for CAT.

  - Opportunities exist around partnering with local businesses and institutions to provide transit benefits (in the form of discounts of deals) to employees and students to further increase the likelihood of ridership.
  - Engage with the community to understand how best transit can serve them, and what would make them use transit more to increase ridership.
  - Introduce ancillary services or additional services on and around transit (both on-board and at major stops or interchanges). This can take the form of mobility hubs to increase transit usage and increase integration with other more sustainable modes.

- Reducing operational costs:
  - Increasing efficiency of service delivery, which can be done by optimizing routes and scheduling, making use of the latest scheduling technology available.
  - Investment in technology can help to improve fare collection and reduce fare evasion.
  - Utilizing more fuel efficient or energy saving vehicles that cost less to operate and run.

- Adjusting fares:
  - There could be opportunities to integrate fares among different modes and other agencies.
  - Introducing a form variable pricing based on time of day or demand to optimize revenue.

2.5 Trend and Peer Comparison Analysis

This section provides trend analyses for key performance, effectiveness, and efficiency measures for the CAT system for the past 5 years. In addition, comparisons to peer agencies have been provided to show how the CAT system performs against similar systems.

This evaluation was conducted using data directly obtained from the National Transit Database (NTD) across a number of different variables for transit performance. These system performance measures are recommended by the FDOT TDP Handbook for general performance, efficiency, and effectiveness, as listed and categorized in the table below.

Table 2-7: System Performance Review Measures

Performance Measures	Effectiveness Measures	Efficiency Measures
Unlinked Passenger Trips	Unlinked Passenger Trips per Capita	Operating Expense per Capita
Passenger Miles Travelled	Passenger Miles Travelled per Capita	Operating Expense per Unlinked Passenger Trip
Vehicle Revenue Miles	Vehicle Revenue Miles per Capita	Operating Expense per Passenger Miles Travelled
Vehicle Revenue Hours	Unlinked Passenger Trips per Vehicle Revenue Mile	Operating Expense per Vehicle Revenue Miles

Vehicles Operating/Available at Maximum Service	Unlinked Passenger Trips per Vehicle Revenue Hour	Operating Expense per Vehicle Revenue Hours
Operating Expense		Vehicle Revenue Miles per Vehicle
Fare Revenue		Farebox Recovery Ratio
		Average Fare

2.5.1 PEER SELECTION

The peer selection process followed the methodology provided by the Transit Cooperative research Program (TCRP) Report 141: A Methodology for Performance Measurement and Peer Comparison in the Public Transportation Industry and recommended by the FDOT TDP Handbook (2022).

The guidance recommends a minimum of 4 agencies and for the purposes of this TDP, 10 agencies have been selected as the final peer group. It is crucial to select a suitable group of peer agencies to ensure that credible comparisons can be made to provide insight and trigger action, as opposed to poorly chosen peers which can produce irrelevant results.

For the purpose of performance measuring, an initial group of 16 peers was formed to be compared to CAT. For this TDP update, all previous agencies that were included in the prior TDP update were included as well as additional agencies that were deemed to be similar in nature to CAT. This initial list of peer agencies consisted of:

Table 2-8: Transit System Peer Review Selection

Transit System	**Location**	Peer Description
The M (Montgomery Area Transit)	City of Montgomery, AL	From Previous TDP
TTA (Tri-State Transit Authority)	Huntington, WV	From Previous TDP
The Wave Transit System	City of Mobile, AL	From Previous TDP
ART (Asheville Redefines Transit)	City of Asheville, NC	From Previous TDP
GCT (Gwinnett County Transit)	Lawrenceville, GA	From Previous TDP
PCPT (Pasco County Public Transportation)	New Port Richey, FL	From Previous TDP
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	From Previous TDP
Breeze Transit (Sarasota County Area Transit)	Sarasota, FL	Newly Added
LeeTran (Lee County Transit)	Fort Myers, FL	Newly Added
Bayway (Bay County Transportation)	Pensacola, FL	Newly Added
GoLine (Indian River County)	Vero Beach, FL	Newly Added
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	Newly Added
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	Newly Added
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	Newly Added
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	Newly Added

The selection of potential peers was conducted using the peer selection methodology outlined in the FDOT TDP Handbook, employing validated 2022 National Transit Database (NTD) data and the Florida Transit

Information System (FTIS). Additional potential peers that were selected consisted of transit agencies from the previous TDP and agencies located in the southeastern United States, specifically those with coastal characteristics in their geographic profiles.

From the newly identified transit agencies, Breeze Transit (Sarasota, FL), LeeTran (Fort Myers, FL), Bayway (Pensacola, FL), GoLine (Vero Beach, FL), and Citrus Connection (Lakeland, FL) were chosen because they are situated within Florida, either in coastal counties or counties near Collier County. Additionally, CARTA (North Charleston, SC), ECAT (Pensacola, FL), and CCRTA (Hyannis, MA) were selected based on their recommendation as top peers to CAT according to the FTIS Urban iNTD tool. It is worth noting that ART was also recommended but was already included in the previous TDP peer group.

NTD data for this initial set of peer agencies was then obtained and analyzed to determine similarity to CAT and suitability to be used as a peer. Likeness scores were calculated for 14 different indicators including 8 operating characteristics and 6 exogenous variables. A secondary screening was also performed with additional indicators to rule out any anomalies within the initial peer group. A detailed account of the selection methodology can be found in Appendix A.

Based on the results from the initial likeness score comparison and the secondary screening, a final set of 10 agencies were selected, as listed in Table 2-9 below. The table also includes the likeness score for each agency and the reasons that the agency was selected to be in the final peer group.

Table 2-9: Average of Likeness Score Sums by Peer Group

Peer Agency	Likeness Score	Reasoning for Top 10 Selection
Breeze Transit (Sarasota County Area Transit), Sarasota, FL	6.98	Likeness score and location of the peer is desirable.
LeeTran (Lee County Transit), Fort Myers, FL	7.80	Likeness score from the primary review was substantially lower and location of the peer is desirable.
Bayway (Bay County Transportation), Pensacola, FL	6.03	Likeness score and location of the peer is desirable.
ECAT (Escambia County Area Transit Authority), Pensacola, FL	6.05	Likeness score
CCRTA (Cape Cod Regional Transit Authority), Hyannis, MA	6.30	Likeness score
CARTA (Charleston Area Regional Transportation Authority), North Charleston, SC	6.06	Likeness score
Citrus Connection (Lakeland Area Mass Transit District), Lakeland, FL	5.68	Likeness score and location of the peer is desirable.
The Wave (Cape Fear Public Transportation Authority), Wilmington, NC	5.49	Likeness score
The Wave Transit System, City of Mobile, AL	6.81	Likeness score
PCPT (Pasco County Public Transportation), New Port Richey, FL	6.35	Likeness score

It is acknowledged as part of the methodology that peers will not be exactly like one another in all categories and the approved methodology is built to allow for that and allow for similarity in only a few other categories.

For full details on stage 2 of the screening refer to Appendix A for the full Peer Selection methodology.



2.5.2 NORMALIZING DATA

To accurately portray cost data, all monetary values were normalized to reflect the effects of inflation and differences in labor costs between geographical regions. It is important to consider for labor costs differences as it allows for conclusions to be drawn with more certainty that the cost differences between agencies are due to internal agency efficiency variances rather than external cost variation. Labor costs are also typically the largest component of an agency's operating costs. It is relevant to consider inflation rates to see if an agency's costs are changing faster or slower than inflation when conducting trend analyses.

To adjust for differences in labor costs between counties, average labor wage rates were used to recalculate cost data. Annual average weekly wages for 2022 were obtained from the US Bureau of Labor Statistics' Quarterly Census of Employment and Wages. All occupation types were included in the average calculation as agencies have no control over general labor environments in the county, which the cost data is being adjusted for, as opposed to the industry-specific labor rates that the agencies have some control over. Including all occupations also allows for an agency to analyze how much of its labor is spent in comparison to the county's average wages, as well as to adjust its costs to reflect changes in the county's overall cost of living. The peer agencies' cost data was adjusted for labor cost differences by multiplying the raw cost data from NTD by the ratio between Collier's average labor cost over the peer agency county's average labor cost.

To adjust for inflation in trend analyses, consumer price indices (CPI) were used to recalculate cost data. As the selected peers are located in different states around the United States, national CPIs were used. CPI values for the years of 2018 to 2022 were obtained from the US Bureau of Labor Statistics' CPI Inflation Calculator to adjust cost data for inflation across these years. This was done by multiplying the raw cost data from NTD by a ratio between the initial year's (2018) CPI over the analysis year's CPI.

2.5.3 PERFORMANCE MEASURES

Data for select system characteristics were taken from NTD to assess the general operating performance of the CAT system and its chosen peers. All of the performance indicators are based on exact data values from the NTD database, reflecting total values for all modes.

2.5.3.1 Unlinked Passenger Trips

Unlinked passenger trips (UPT) refer to the number of people riding only one public transit vehicle from origin to destination, counting a new trip each time a vehicle is boarded no matter how many transfers are made. UPT data represents the market demand for service, and a higher number of passenger trips is considered a positive metric. UPT numbers for CAT decreased by almost 30% from 0.95 million trips in 2018 to 0.65 million in 2021 but increased to 0.75 million in 2022. The growth in trips from 2021 to 2022 suggests service improvements have started to take effect as ridership has returned following the COVID pandemic. Due to three peers with much higher UPT values, CAT falls below the average UPT (shown with the orange line in the peer comparison chart below) of the peer group. Excluding these top three peers, Collier has one of the higher UPT values amongst the remaining peers.

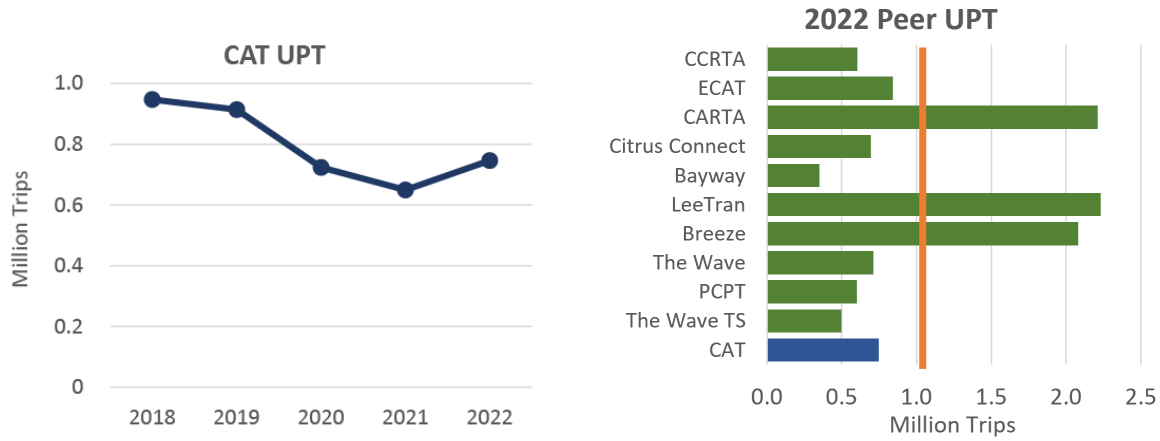


Figure 2-13: 5-year trend (left) and 2022 peer comparison (right) charts for unlinked passenger trips.

2.5.3.2 Passenger Miles Travelled

Passenger miles travelled (PMT) denotes the total distance travelled by all passengers using the service. As with UPT, higher PMT is also a positive metric. PMT numbers for CAT follow the same trend as the UPT numbers, decreasing about 30% from 7.4 million miles in 2018 to 5.3 million in 2021, but increasing to 6.1 million in 2022. This is directly reflective of passenger trips which are to be expected. Similar to UPT, the same three agencies with much higher PMT values are influencing the average value to be higher. CAT PMT is just below the average value and is also one of the higher values excluding these top three agencies.

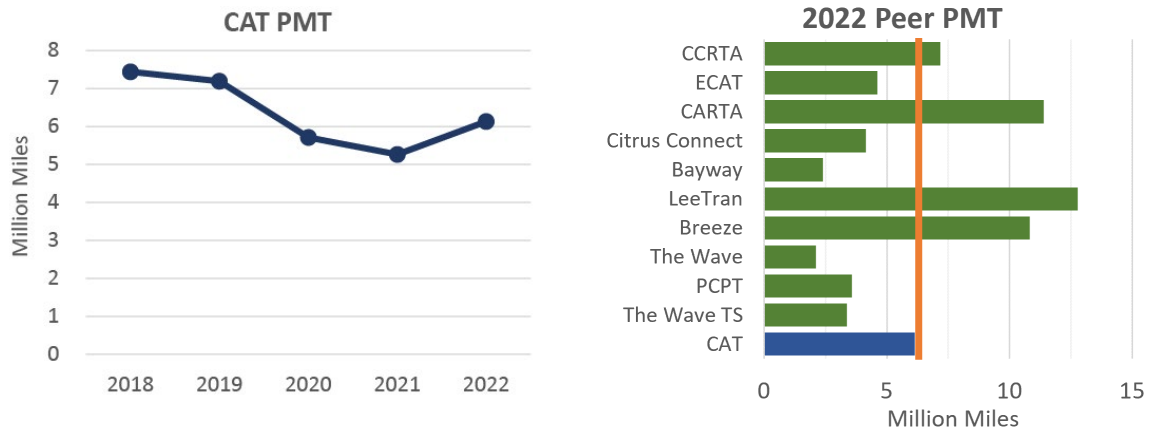


Figure 2-14: 5-year trend (left) and 2022 peer comparison (right) charts for passenger miles travelled.

2.5.3.3 Vehicle Revenue Miles

Vehicle revenue miles (VRM) detail the total distance travelled where the transit service was operating in revenue service, which excludes deadhead travel, training operations, and charter services. VRM as a metric itself is not indicative of positive or negative performance and should be analyzed in relation to productivity and cost-effectiveness measures. The slightly decreasing trend in CAT vehicle revenue miles suggests that services are being withdrawn, and with the lack of riders and passenger miles in 2020 and 2021 but a relatively stable amount of service being provided suggest that a major cost recovery issue would have occurred that is likely still impacting the agency. CAT VRM is just below the peer average, however, VRM itself is not indicative of performance. The larger transit agencies such as LeeTran and Sarasota Breeze most likely run more service or longer routes that result in greater VRM.

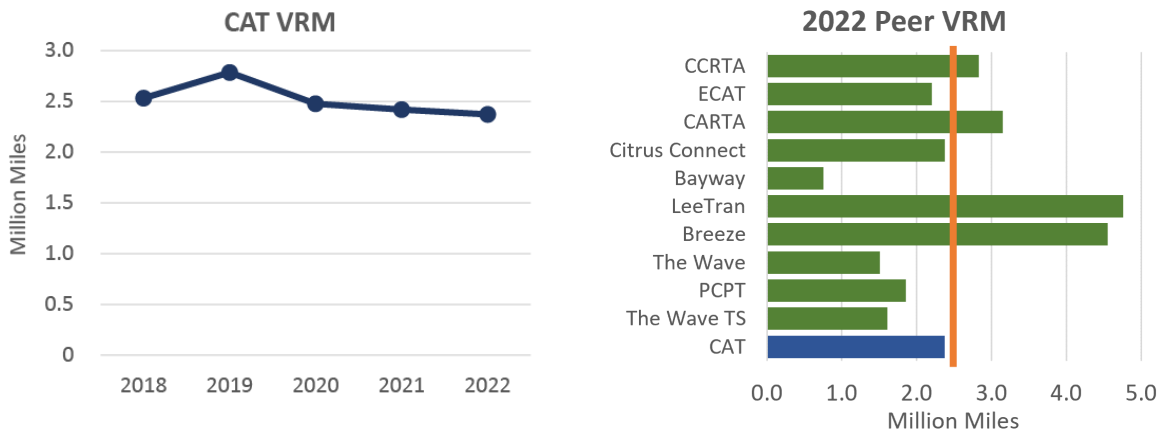


Figure 2-15: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue miles.

2.5.3.4 Vehicle Revenue Hours

Vehicle revenue hours (VRH) represent the total travel time that transit vehicles have operated during revenue service. Like with VRM, VRH as a metric itself is not indicative of positive or negative performance and should be analyzed in relation to productivity and cost-effectiveness measures. Given than CAT VRH values have gone up slightly from 2021 to 2022 compared to decreasing VRM, this would suggest that routes that serve longer distances and cover more miles, possibly towards more rural areas have been restricted and instead shorter routes with more service has replaced it. The increase is also a reflection of congestion as a result of the growth within the county, causing longer travel times for the same distances compared to the previous year. CAT VRH is below the peer average, but again VRH itself is not indicative of performance. The larger transit agencies such as LeeTran and Sarasota Breeze most likely run more service or for longer times which results in greater VRH.

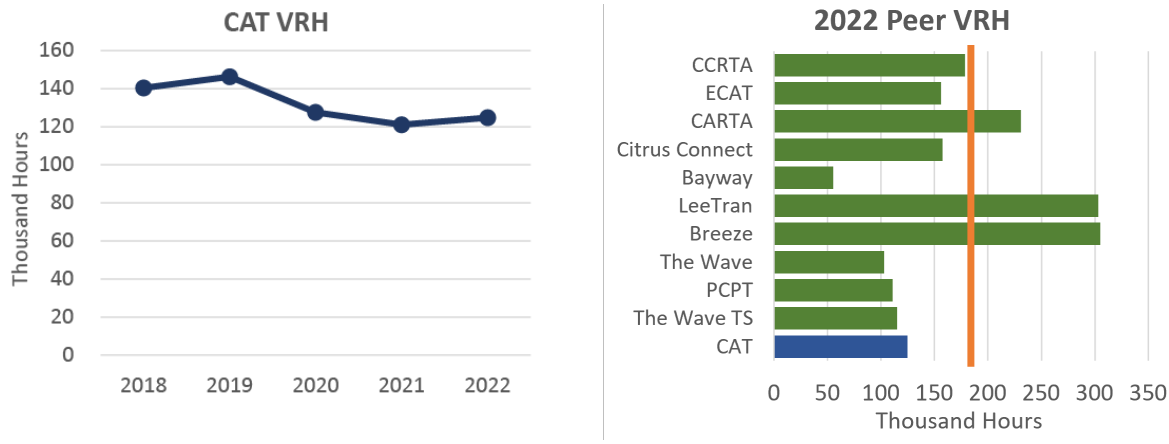


Figure 2-16: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue hours.

2.5.3.5 Vehicles Operating/Available at Maximum Service

Vehicles operating or available at maximum service counts the number of vehicles that are required for (VOMS) or are available to (VAMS) the transit agency to operate at peak full service. VOMS is important for assessing fleet size, directly relating to the network structure and availability of service. VOMS/VAMS numbers can impact the number of routes and frequency of service offered by the transit agency. VOMS helps to determine the required vehicle demand during maximum service versus the vehicles available. VAMS increased from 2020 to 2021 during the pandemic, when less service was required and VOMS was lower. This likely resulted in the decrease in VAMS from 2021 to 2022, however, VOMS has since increased, which would suggest that CAT are operating very close to the line in terms of not having enough vehicles to provide service. Both CAT VOMS and VAMS values are below the peer average, but this is not indicative of performance as agencies will require different numbers of vehicles due to varying services.

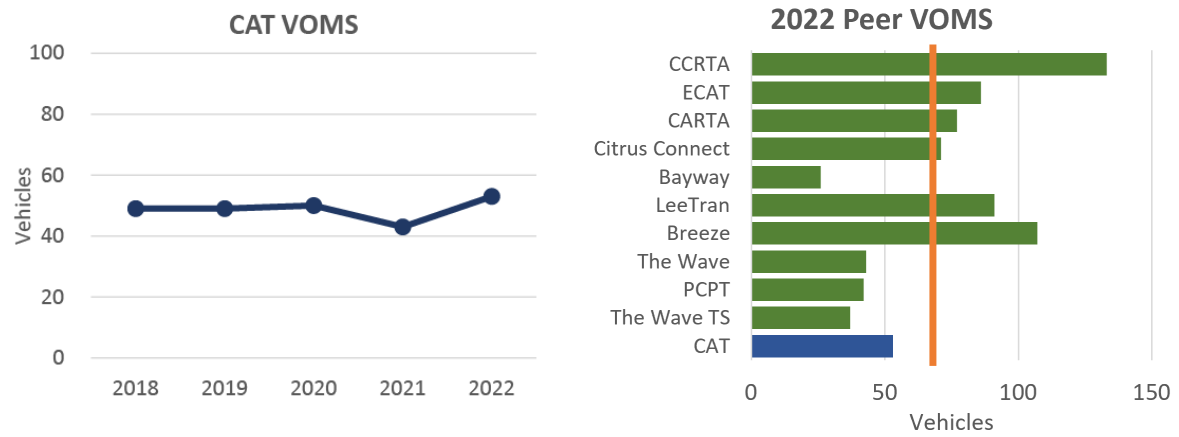


Figure 2-17: 5-year trend (left) and 2022 peer comparison (right) for vehicles operating at maximum service.

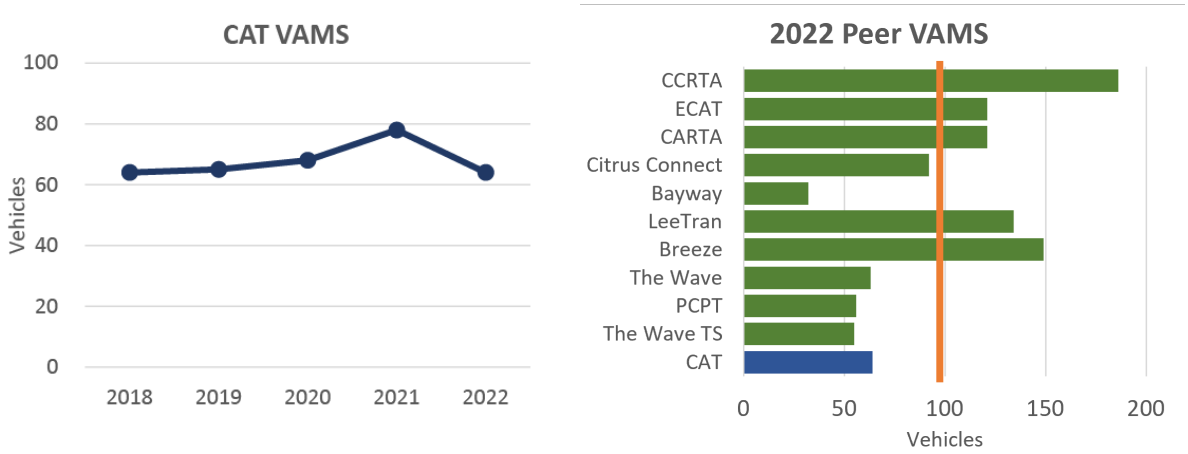


Figure 2-18: 5-year trend (left) and 2022 peer comparison (right) for vehicles available at maximum service.

2.5.3.6 Operating Expense

Total operating expense considers all costs associated with operating the transit service, including operational, maintenance, and administrative costs. The NTD data values for operating expense were recalculated for the peer comparison chart to account for differences in labor costs across different geographical regions. The CAT trend chart includes a secondary data series reflecting the cost data in

2018-dollar values, depicting the impacts of inflation over the years. CAT operating expenses have shown a general increase in trends since 2018 which is to be expected as service gets more expensive to deliver. However, the increase in operating expenses does not appear as drastic between 2021 to 2022 in 2018-dollars, indicating the increase in cost is mostly due to the impact of inflation. Operating expenses should be analyzed in relation to fare revenue and farebox recovery rates to determine how much of the cost of the service is being recuperated. CAT operating expenses are below the peer average, indicating that the transit system does not cost as much to operate compared to the other larger agencies.

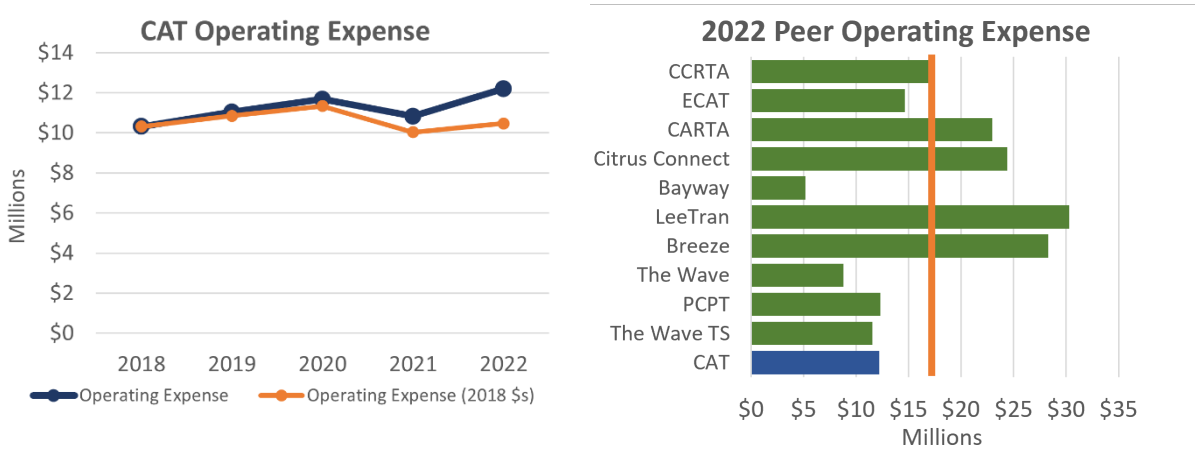


Figure 2-19: 5-year trend (left) and 2022 peer comparison (right) charts for operating expense.

2.5.3.7 Fare Revenue

Fare revenue is the total amount of revenue generated from fare-paying transit service users. Again, the CAT trend chart includes a secondary data series reflecting the revenue data in 2018-dollar values, depicting the impacts of inflation over the years. Post-pandemic, CAT fare revenue has been steadily increasing which would be in line with passenger trips also increasing. As with operating expense, fare revenue is most useful when analyzed in relation to operating expense and farebox recovery rates. CAT fare revenue is below the peer average, indicating that CAT receives less revenue from rider fares compared to other agencies, especially CARTA with a significantly higher fare revenue value.

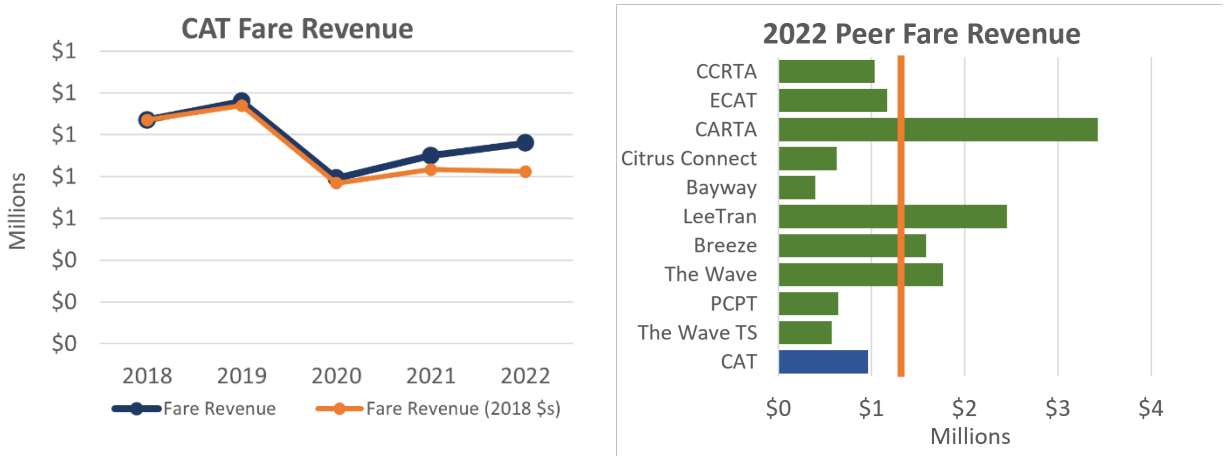


Figure 2-20: 5-year trend (left) and 2022 peer comparison (right) charts for fare revenue.

2.5.4 EFFECTIVENESS MEASURES

Service effectiveness is represented by performance characteristics in relation to the population, as the selected indicators demonstrate to what extent service-related goals are being achieved. This includes service supply, service consumption, and quality of service. Effectiveness measure values are obtained or derived from NTD data and reflect total values for all modes.

2.5.4.1 Unlinked Passenger Trips/Passenger Miles Travelled per Capita

UPT per capita is calculated by dividing UPT by the service area population, measuring transit usage within the service area. Similarly, PMT per capita is derived from dividing PMT by the service area population. Higher values represent a greater utilization of service. CAT UPT and PMT per Capita values have been decreasing over the years, with a steeper decrease towards 2020, likely due to people taking transit less during the pandemic. There was a small increase from 2021 to 2022 as ridership began to improve back towards pre-pandemic levels. CAT UPT per capita is below the peer average and PMT per capita just slightly below, demonstrating that service utilization is less effective compared to other agencies, especially CARTA with a significantly higher value.

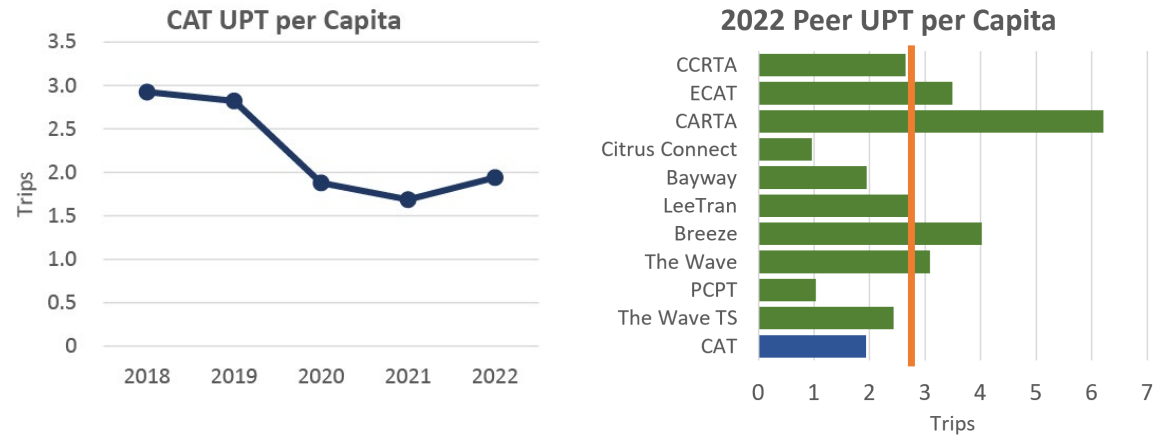


Figure 2-21: 5-year trend (left) and 2022 peer comparison (right) for unlinked passenger trips per capita.

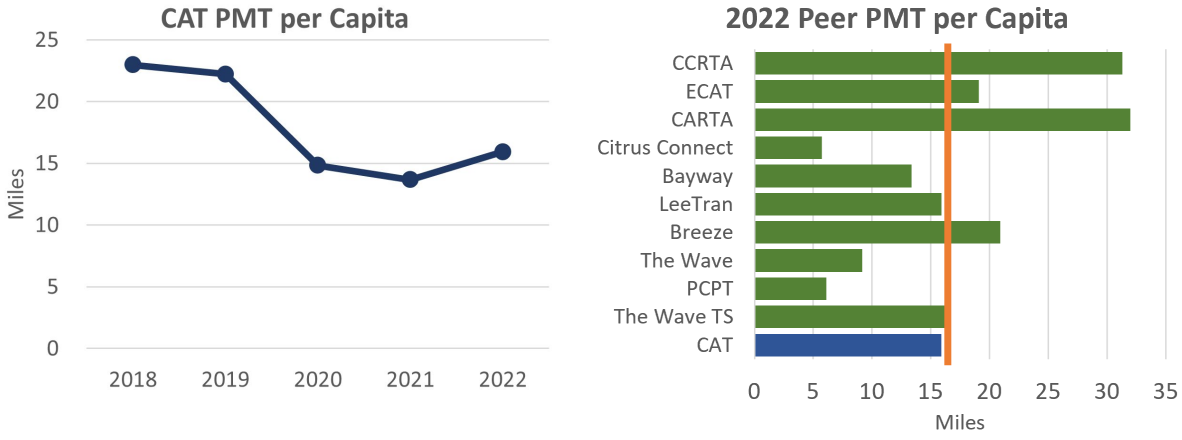


Figure 2-22: 5-year trend (left) and 2022 peer comparison (right) for passenger miles travelled per capita.

2.5.4.2 Vehicle Revenue Miles per Capita

VRM per capita is calculated from the dividing VRM by the service area population, measuring the supply of service provided based on the population of the service area. There was a significant decrease in VRM per capita from 2019 to 2020, likely due to reduced service as a result of the pandemic. Values stayed relatively steady after 2020, but still slightly decreasing. The 2022 CAT value is just below the peer average.

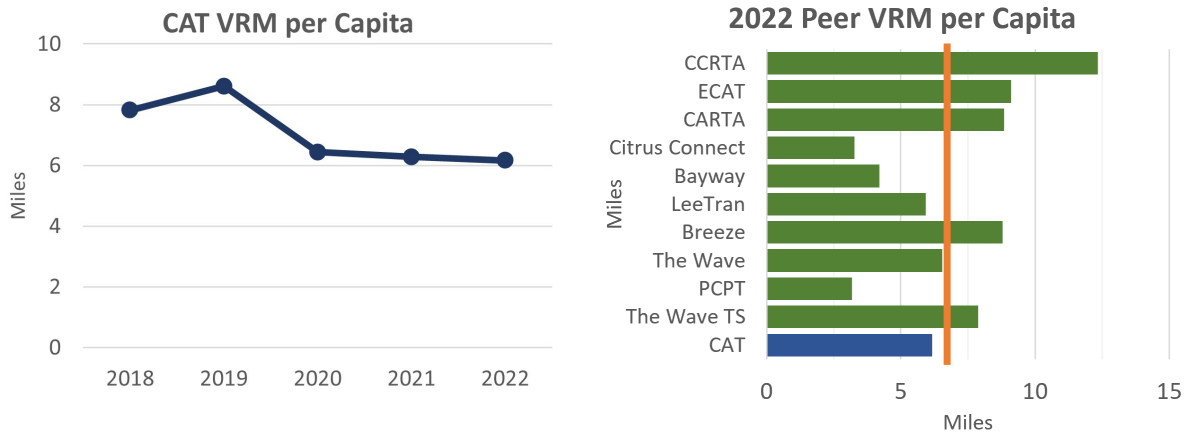


Figure 2-23: 5-year trend (left) and 2022 peer comparison (right) for vehicle revenue miles per capita.

2.5.4.3 Unlinked Passenger Trips per Vehicle Revenue Mile/Vehicle Revenue Hour

Dividing UPT by VRM or VRH can serve as other indicators for productivity and service consumption, measuring the utilization rates per unit of provided service. Higher values are desirable as it reflects that there is greater utilization of service. CAT UPT per VRM values stayed consistent for four years after a decrease from 2018 to 2019, while UPT per VRH values decreased over the years and only increased from 2021 to 2022. CAT UPT per VRM is below average and UPT per VRH is average amongst the peers.

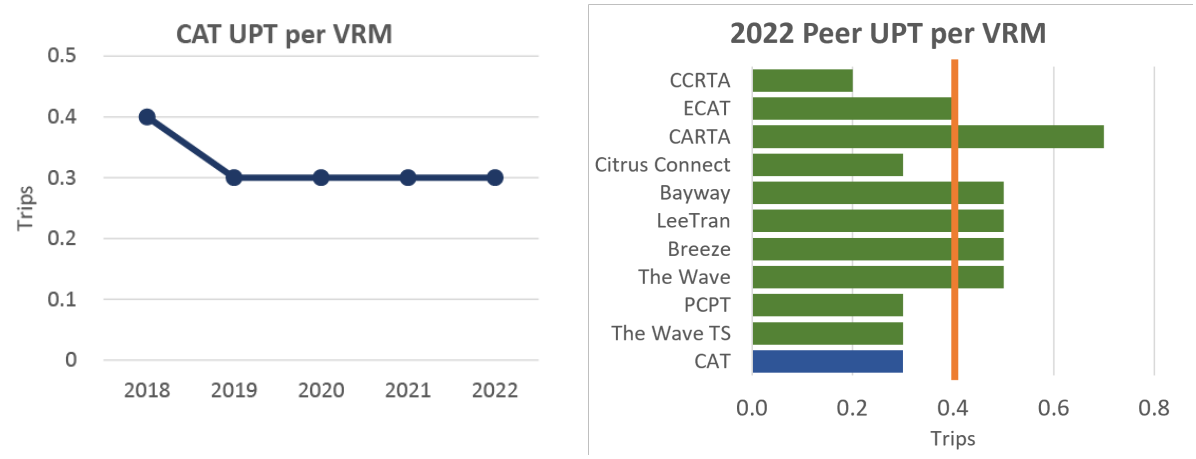


Figure 2-24: 5-year trend (left) and 2022 peer comparison (right) for unlinked trips per vehicle revenue mile.

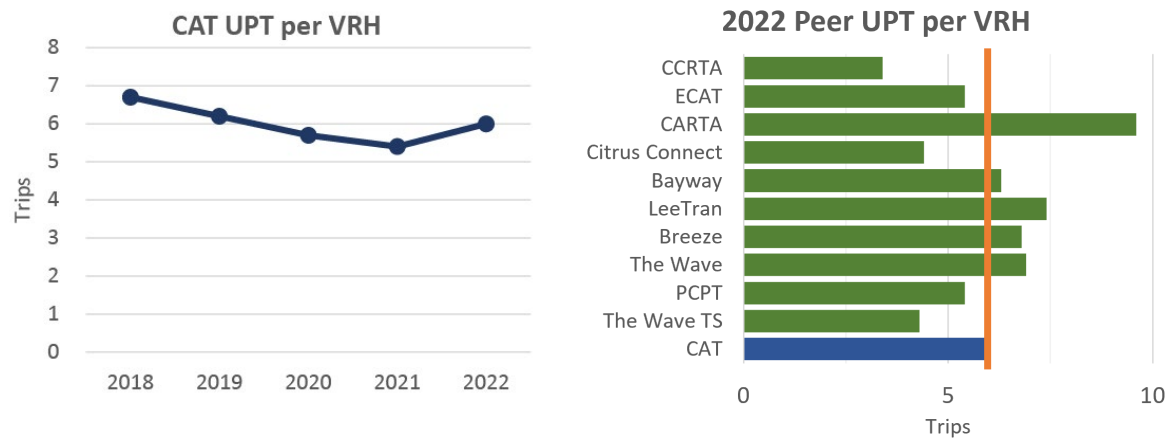


Figure 2-25: 5-year trend (left) and 2022 peer comparison (right) for unlinked trips per vehicle revenue hour.

2.5.5 EFFICIENCY MEASURES

Service efficiency revolves mostly around operating expenses and a few other indicators, in essence, how much it costs to provide and run the service. Most of the efficiency measures are derived from ratios between two performance measures, and again reflect total values for all modes. The data values for all measures involving operating expense were recalculated for the peer comparison charts to account for differences in labor costs across different geographical regions. The trend charts include secondary data series reflecting the cost data in 2018-dollar values, depicting the impacts of inflation over the years.

2.5.5.1 Operating Expense per Capita

Operating expense per capita reflects the total investment spent on provided transit services in relation to the service area population. The metric itself reflects greater investment in transit with higher values, however, there are many additional underlying considerations including productivity, demand, and utilization. Operating expense per capita decreased from 2019 to 2021, possibly due to lowered costs from less service during the pandemic, then increased in 2022. CAT's operating expense per capita value is below the peer average, indicating that it spends less per capita to operate compared to other agencies.

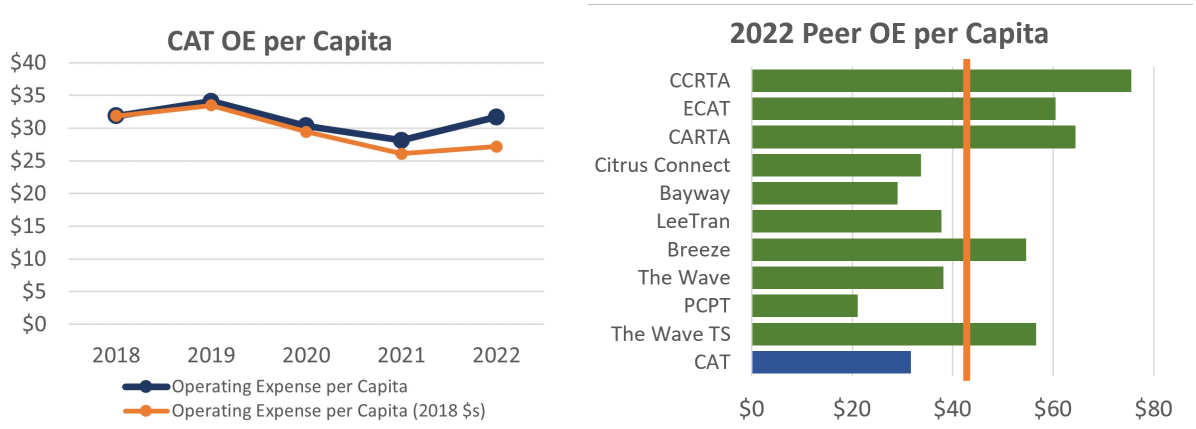


Figure 2-26: 5-year trend (left) and 2022 peer comparison (right) charts for operating expense per capita.

2.5.5.2 Operating Expense per Unlinked Passenger Trip/Passenger Mile Travelled

Operating expense per UPT/PMT indicate the average cost to provide service for each unlinked trip or passenger mile, showcasing the market demand for the service and how service is delivered. The lower these values, the better, as it is ideal to minimize cost per trip/mile. The trends for operating expense per UPT/PMT are identical; increasing up to 2021 and slightly decreased in 2022. The increase from 2020 to 2021 was mostly due to inflation as the trends decreased from 2020 to 2022 in 2018-dollar values. The operating expense per UPT/PMT values for CAT are below the peer averages, meaning that it costs less to operate per trip/mile compared to other agencies.

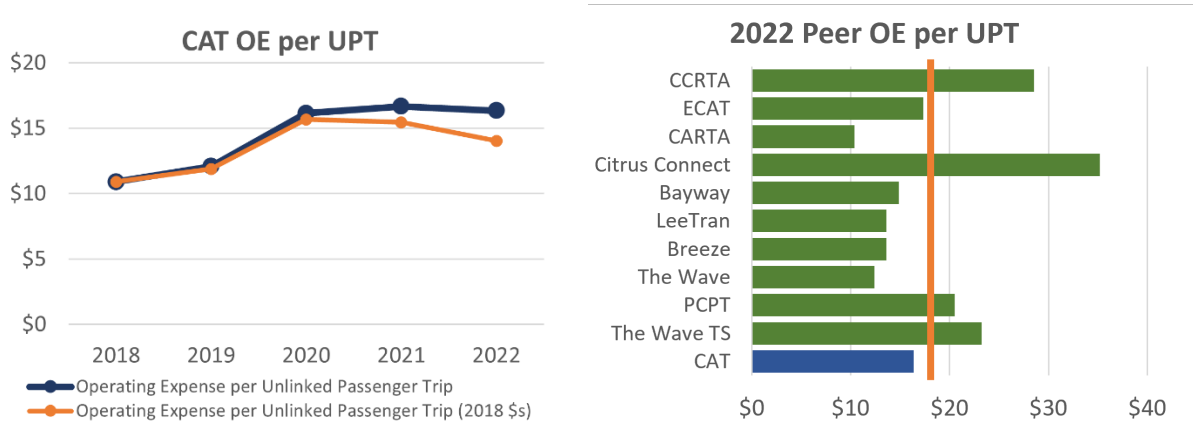


Figure 2-27: 5-year trend (left) and 2022 peer comparison (right) for operating expense per unlinked trip.

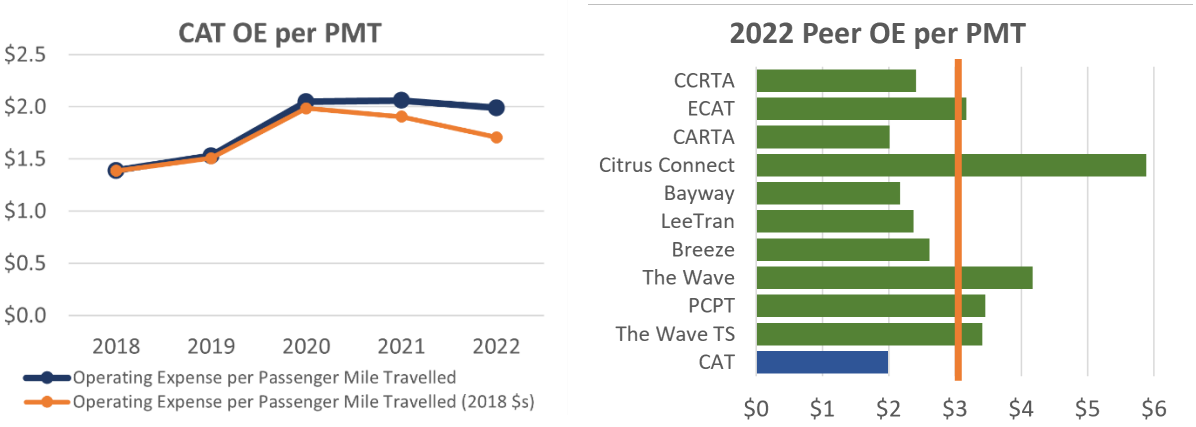


Figure 2-28: 5-year trend (left) and 2022 peer comparison (right) for operating expense per passenger mile.

2.5.5.3 Operating Expense per Vehicle Revenue Mile/Vehicle Revenue Hour

Operating expense per VRM/VRH are average cost calculations for every service mile or hour, evaluating the efficiency of transit service delivery. Lower values are ideal to minimize the cost per mile/hour. CAT operating expense and vehicle revenue miles have been consistently increasing, except for a slight decrease from 2020 to 2021. Apart from Citrus Connect, the operating expense per VRM/VRH values are close together across the agencies. CAT's values are below the peer averages, demonstrating that it costs less to operate per mile/hour compared to other agencies.

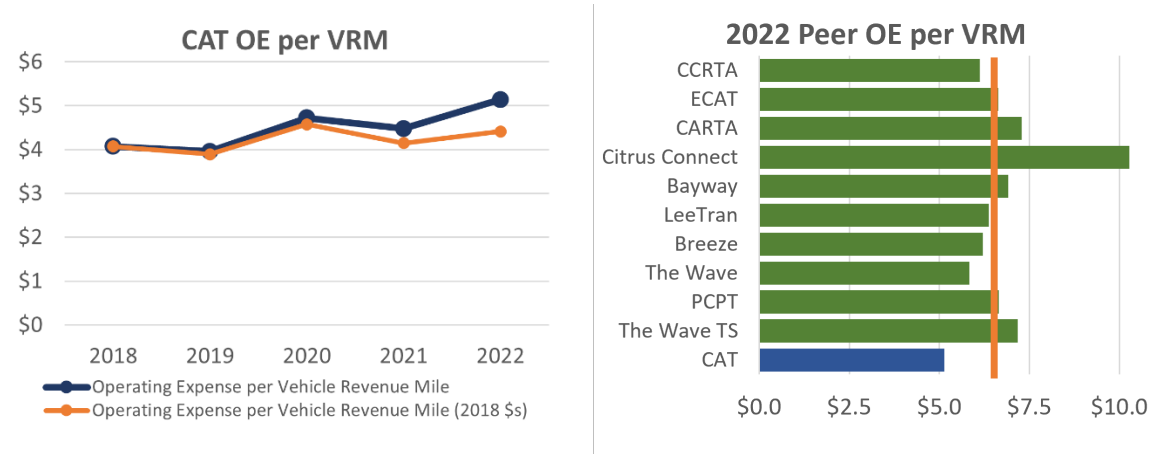


Figure 2-29: 5-year trend (left) and 2022 peer comparison (right) for operating expense per revenue mile.

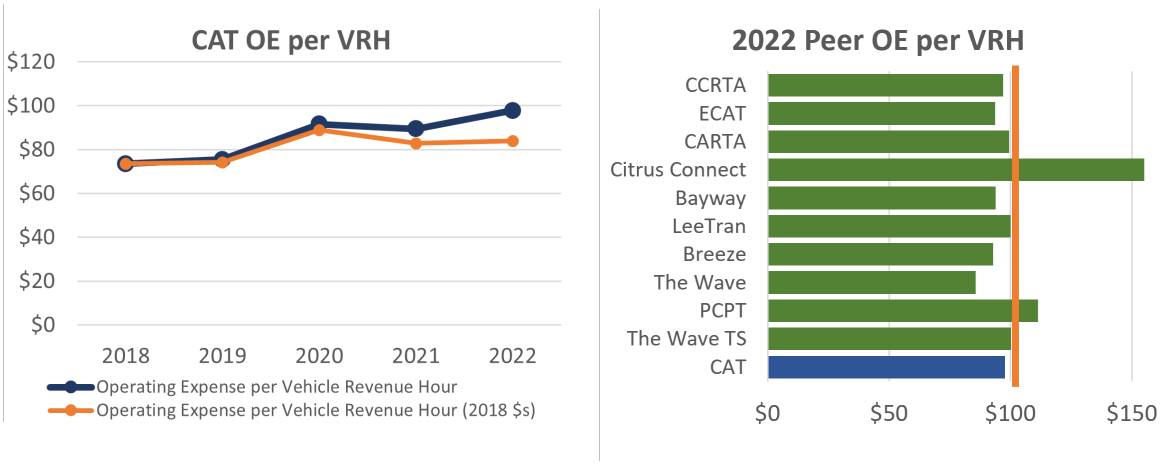


Figure 2-30: 5-year trend (left) and 2022 peer comparison (right) for operating expense per revenue hour.

2.5.5.4 Vehicle Revenue Miles per Vehicle

VRM per vehicle is the average service provided by each vehicle in operation during maximum service, derived from dividing VRM by VOMS. It is an indication of vehicle utilization, but there are other contextual considerations to be made including fleet size and age. VRM per vehicle values decreased from 2019 to 2021, likely due to lowered vehicle utilization during the pandemic. CAT has the highest VRM per vehicle value compared to the other peer agencies, indicating high vehicle utilization. The increase is also a reflection of congestion as a result of the growth within the county, causing longer travel times for the same distances compared to the previous year.

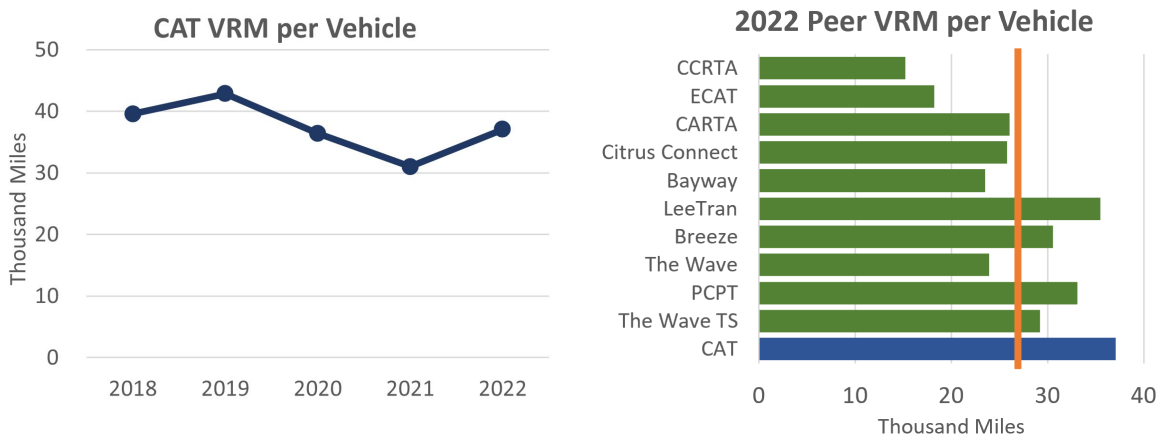


Figure 2-31: 5-year trend (left) and 2022 peer comparison (right) charts for vehicle revenue mile per vehicle.

2.5.5.5 Farebox Recovery Ratio

Farebox recovery ratio is the percentage of the total operating expenses that are funded by total fare revenue from service users, equating fare revenue over operating costs. Higher farebox recovery is desired as that means a greater percentage of the operating costs are covered by passengers compared to other funding sources. The farebox recovery ratio of approximately 8% in 2022 demonstrates a low level of recovery and therefore indicating that the transit network is heavily reliant on other funding sources. However, CAT is performing below but near the peer mean which suggests that it is performing at an average level in comparison to other agencies, many of whom are performing worse.

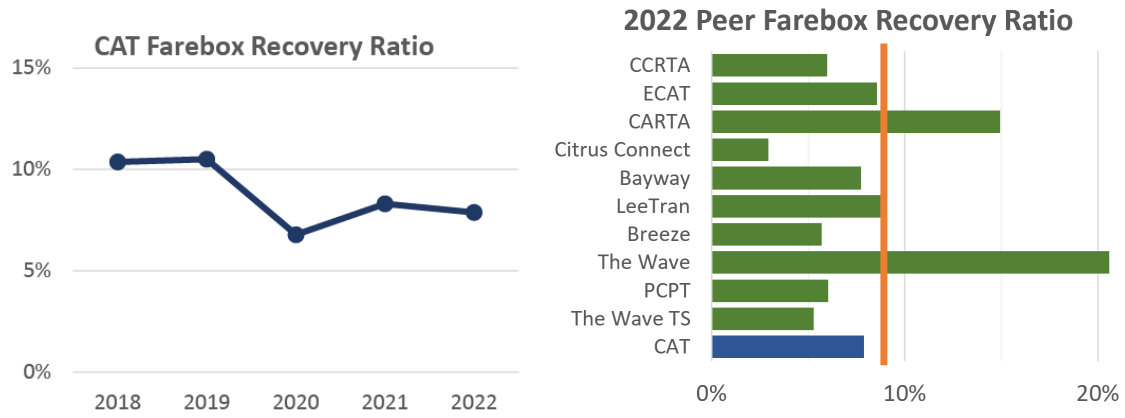


Figure 2-32: 5-year trend (left) and 2022 peer comparison (right) charts for farebox recovery ratio.

2.5.5.6 Average Fare

Average fare is the average amount paid per passenger per trip and is calculated by dividing fare revenue by UPT. The metric itself is not necessarily indicative of performance but is a good comparison to other transit systems in terms of fare cost. CAT's average fare value is right at the peer average, showing that the fares implemented by CAT are comparable to the other agencies, other than The Wave, which has a much higher average fare.

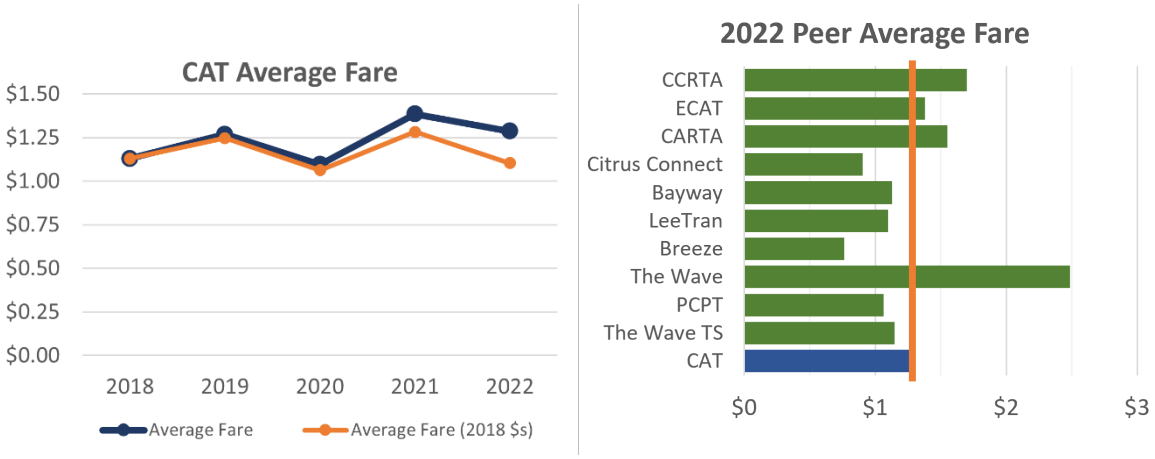


Figure 2-33: 5-year trend (left) and 2022 peer comparison (right) charts for average fare.

2.5.6 KEY FINDINGS

Over the past five years, a clear trend has emerged across most performance measures. From 2018 to 2021, values declined, with the most significant drop occurring between 2019 and 2020, likely due to the onset of the COVID-19 pandemic, which severely impacted the CAT transit system. By 2022, performance measures began to recover, possibly reflecting adaptations by the transit systems to pandemic-related challenges and a gradual return of riders. Rising costs and inflation since the pandemic have likely driven up operating expenses, affecting service delivery. Despite the removal of the last loop for Routes 11, 12, 13, 14, and 17, as per the FY2024 update of the TDP, ridership increased during the peak season between FY23 and FY24.

Overall, the indicators for CAT are mostly below the peer averages. This has different meanings and implications for the various measures. For the general performance measures, it indicates that CAT provides less service and there may be less transit demand compared to other agencies. The charts showed that CAT values were actually quite close to most of the other agencies in the peer group aside from CARTA, LeeTran, and Sarasota Breeze, which are larger transit agencies that serve a larger population size. For the effectiveness measures, CAT values falling lower than the peer average demonstrates that the transit system may not be as effective as other agencies, as the utilization of service is lower. On the other hand, lower than average values for the efficiency measures indicates that CAT is doing better than the peer agencies, as it costs less for CAT to operate per capita, trip, mile, or hour.

In general, the analysis of CAT trends over the years and comparing CAT to other peer agencies helps to identify how CAT is performing in its operations. Seeing how other agencies perform can assist with identifying where CAT can improve its existing system.

3 On-Board Surveys

CAT conducts surveys frequently with a target of every two years to evaluate the existing system and provided service, as well as soliciting suggestions and feedback. Surveys are conducted to better understand the needs and concerns of current users, welcoming CAT riders to provide feedback on how they think service can be improved.

Two past surveys were developed and conducted to gather information on how the existing system is perceived and what services are in demand. These are the CAT Sticker Survey conducted in November 2022 and the Baseline CAT Survey. The CAT Sticker Survey explores how riders use CAT service and the RideCAT mobile app. The Baseline CAT Survey delves more into the demand of services in addition to service satisfaction. This survey has a lot more responses compared to the previous survey.

The results from these surveys provide a better understanding of the attitudes, habits, and preferences of riders as survey responders indicate their common trip routes and purposes. This helps to show the gaps in the existing transit service and potential for service improvements based on demand.

An additional survey was started in mid-November 2024. Once this data is provided it will be incorporated into this report.

3.1 Survey Characteristics

The surveys consisted of questions regarding passenger socio-demographics, travel behaviour and characteristics, and rider satisfaction. The gathered information included:

- Socio-demographics:
    - Age
    - Gender
    - Education Attainment
- Travel behaviour and characteristics:
    - Commonly taken bus routes
    - Trip purpose for transit trips
    - Length of time using CAT services
    - Method for receiving service alerts
    - RideCAT mobile app usage
- Rider satisfaction:
    - How well various services meet transportation needs
    - Ease of usage for various services
    - Service improvement importance rankings
    - Cleanliness of transportation infrastructure
    - Overall experience ratings
    - Satisfaction of service

3.2 Passenger Demographic Information

The CAT Sticker Survey asked riders for demographic information including age, gender, and highest level of education attained. From the results, it appears that most of the survey respondents were young adults aged between 21-30, most likely university students. There were a few more male respondents than female respondents. The results can be seen in the following graphs below.

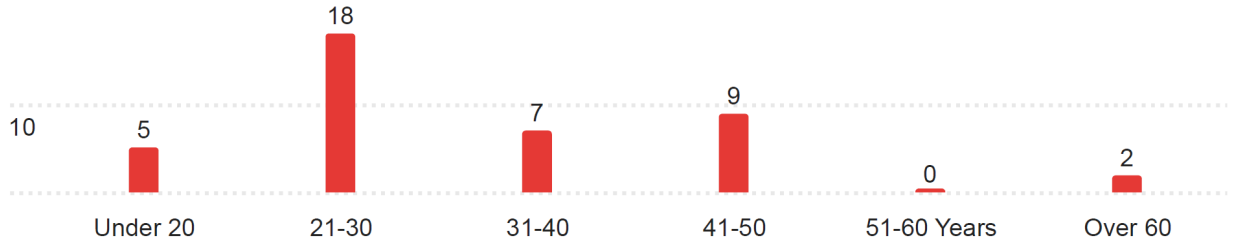


Figure 3-1: Distribution of respondent age from CAT Sticker Survey responses.



Figure 3-2: Distribution of respondent gender from CAT Sticker Survey responses.

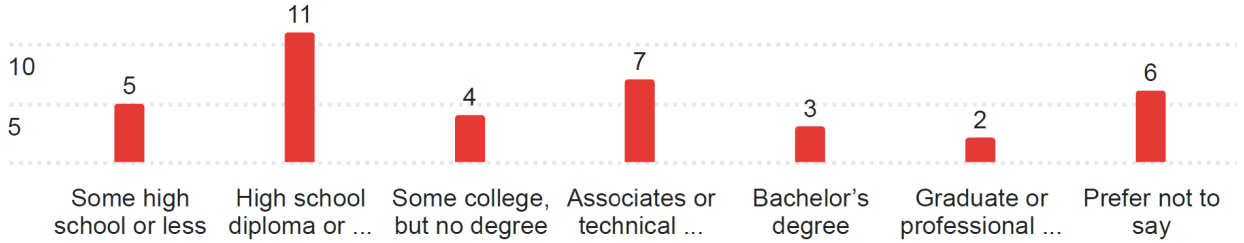


Figure 3-3: Distribution of respondent educational attainment from CAT Sticker Survey responses.

3.3 Passenger Travel Behavior and Characteristics

Survey respondents were asked which routes they usually ride, and the results are shown in the graph below. The top routes were the 11, 12, and 19.

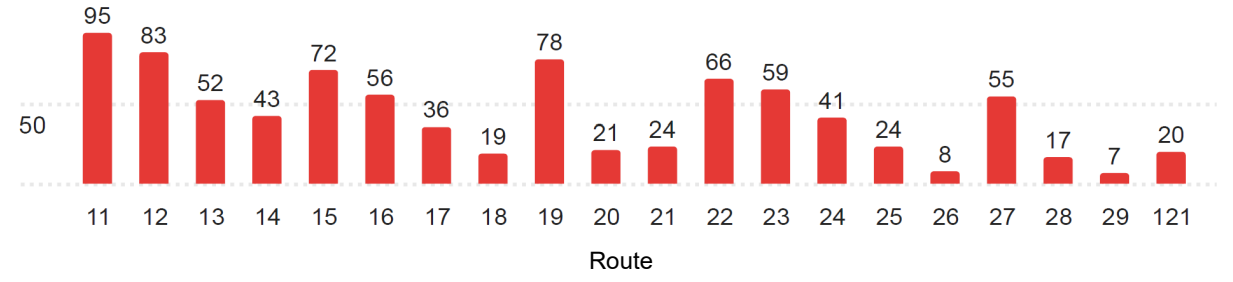


Figure 3-4: Distribution of most frequented routes from Baseline CAT survey responses.

Additionally, respondents were asked to indicate which destinations they take transit to get to. The top trip purpose for transit trips was to go to work, followed by shopping, and the remaining trip purposes had a fairly even distribution of responses.

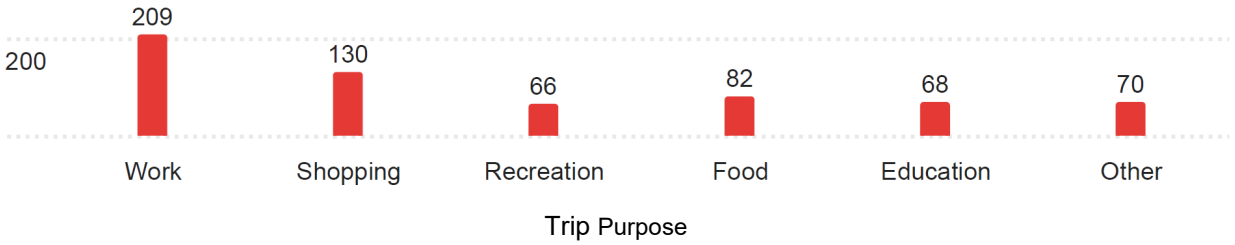


Figure 3-5: Distribution of trip destinations from Baseline CAT Survey responses.

Other survey questions include how long the rider has been a user of CAT and how they receive CAT service alerts. A majority of the survey respondents indicated that they have only taken CAT for a year or less (20 responses), others were riding CAT for the first time (10 responses), a few had been riding with CAT for over 5 years (7 responses), and very few between 1 to 5 years (5 responses in total). The majority of respondents find out about CAT service alerts through the website at rideCAT.com (28 responses), some through rideCAT social media (10 responses), and a few through subscription text alerts (6 responses). These results are shown in the graphs in Figure 3-6 and Figure 3-7 below.

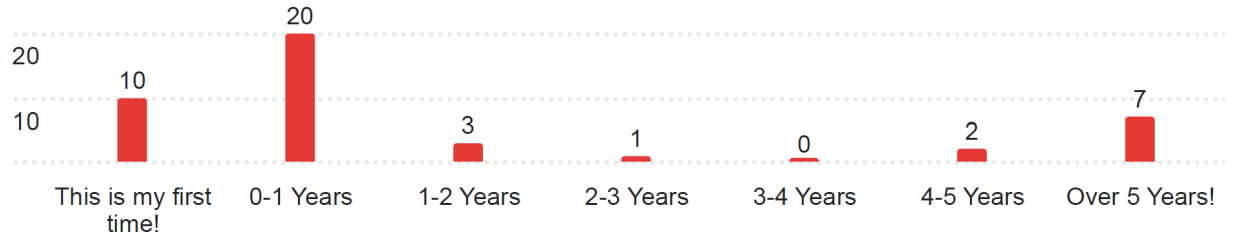


Figure 3-6: Distribution of amount of time riding with CAT from CAT Sticker Survey responses.



Figure 3-7: Distribution of method for receiving service alerts from CAT Sticker Survey responses.

The survey also includes a few questions about the RideCAT mobile app such as if riders are aware of the app, if they use it, or what prevents them from using it. Majority of the responders said that they are aware of the app and use it (38 and 31 respectively), however, 9 were not aware of the app and 17 did not use it. The answers to why the respondents do not use the app include that they did not know about it, do not know how to use it, or just have no need for it.

3.4 Passenger Satisfaction

Survey responders were asked to rate how well different aspects of the service met their transportation needs, overall ease of use for various services, cleanliness of the different transit infrastructure, the service they received, and their overall experience with CAT.

The responses to this question varied between the CAT Sticker Survey and the Baseline CAT Survey. The graph for the CAT Sticker Survey results shows a positive skew where the majority of responseswas very satisfied and very few were very dissatisfied, as seen in Figure 3-8 below. The graph for the Baseline CAT Survey results in Figure 3-9 shows that most riders just feel neutral about CAT service, many are satisfied with their experience, and an almost equal amount of people are very dissatisfied or very satisfied.

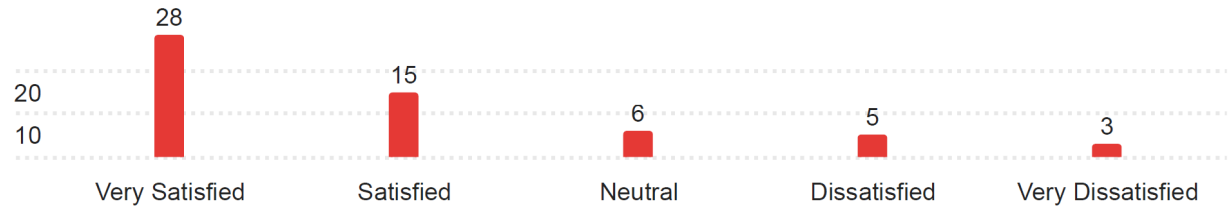


Figure 3-8: Distribution of satisfaction level with CAT service from CAT Sticker Survey responses.

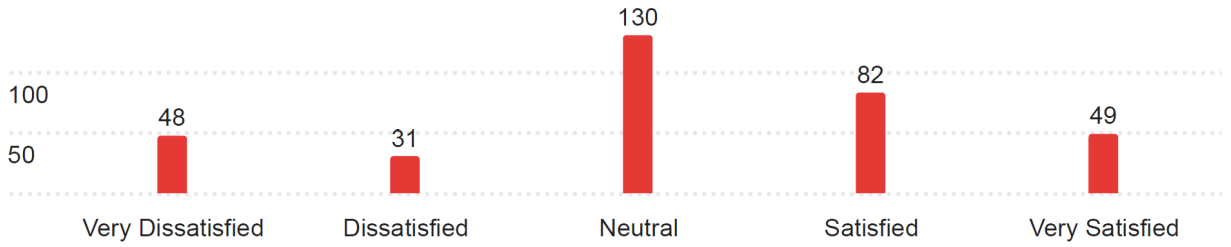


Figure 3-9: Distribution of satisfaction level with CAT service from Baseline CAT Survey responses.

Both surveys also asked how likely the rider would be to recommend CAT services to a friend or colleague. The responses for both surveys followed a similar trend where a majority said they would recommend CAT. The results from both surveys are shown in Figure 3-10 and Figure 3-11 below.

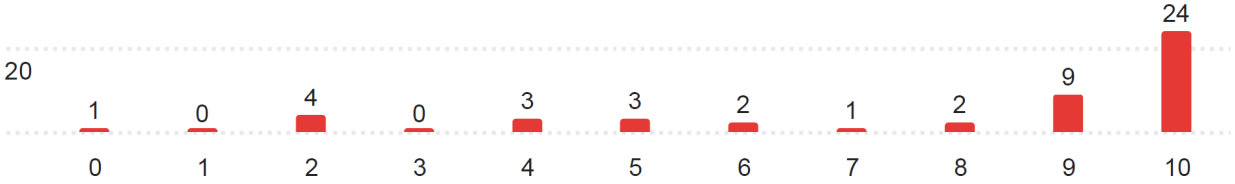


Figure 3-10: Distribution of likeliness to recommend CAT from CAT Sticker Survey responses.

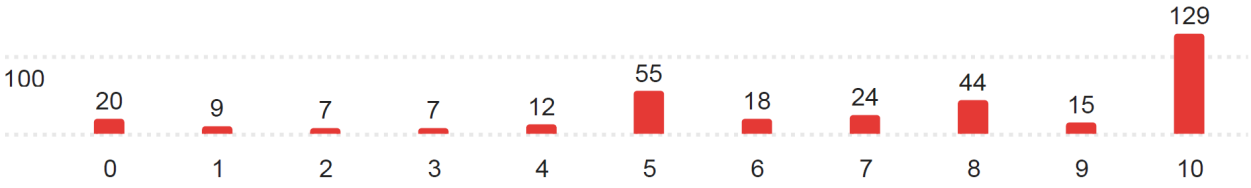


Figure 3-11: Distribution of likeliness to recommend CAT from Baseline CAT Survey responses.

APPENDICES

Appendix A – Peer Selection Methodology

Situational Appraisal – Peer Selection Methodology
Technical Memo No. 1

Date: **July 1, 2024**

Reference: **Contract 18-7432 MP Professional Services Library – Metropolitan Planning**
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: **Situational Appraisal – Technical Memo No. 1**

Introduction

The following memorandum is an update to the original peer selection undertaken in 2020 as part of the previous TDP. Updating and re-analyzing past selected agencies as well as being open to adding new agencies are important during the process of selecting relevant and useful peers for comparison, as this allows Collier Area Transit (CAT) to continually improve and compare itself with relevant peers. It is also important that the chosen peers reflect areas and agencies that can be thought of as aspirational to help CAT identify a path forward for improvement. As a result of this process, nine new peers have been selected for consideration.

The peer selection process followed the methodology provided by the Transit Cooperative Research Program (TCRP) Report 141: A Methodology for Performance Measurement and Peer Comparison in the Public Transportation Industry and recommended by the FDOT TDP Handbook (2022). Peer comparisons use selected performance indicators, effectiveness measures, and efficiency measures to illustrate the performance of the CAT fixed route system relative to the peer group. The peer identification methodology and the identified peers are described below.

Best practice typically dictates that a peer group is comprised of eight to ten peers, for the purposes of this TDP, 16 agencies have been selected for the first level assessment. It is crucial to make sure that the right peer agencies are selected to provide credible comparisons that can provide insight and trigger action, compared to badly chosen peers which can produce irrelevant results.

Initial Peer Group

An initial peer group of agencies similar to CAT was formed, and likeness scores were calculated to determine their similarity and appropriateness. For this TDP update, all agencies included in the previous TDP report were retained, along with additional agencies deemed similar to CAT. This initial peer list consisted of 16 transit agencies as shown in the following table:



Table 3-1: Transit System Peer Review Selection

Transit System	**Location**	Peer Description
The M (Montgomery Area Transit)	City of Montgomery, AL	From Previous TDP
TTA (Tri-State Transit Authority)	Huntington, WV	From Previous TDP
The Wave Transit System	City of Mobile, AL	From Previous TDP
ART (Asheville Redefines Transit)	City of Asheville, NC	From Previous TDP
GCT (Gwinnett County Transit)	Lawrenceville, GA	From Previous TDP
PCPT (Pasco County Public Transportation)	New Port Richey, FL	From Previous TDP
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	From Previous TDP
Breeze Transit (Sarasota County Area Transit)	Sarasota, FL	Newly Added
LeeTran (Lee County Transit)	Fort Myers, FL	Newly Added
Bayway (Bay County Transportation)	Pensacola, FL	Newly Added
GoLine (Indian River County)	Vero Beach, FL	Newly Added
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	Newly Added
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	Newly Added
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	Newly Added
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	Newly Added
GTA (Greensboro Transit Authority)	Greensboro, NC	Newly Added

The selection of potential peers was conducted using the peer selection methodology outlined in the FDOT TDP Handbook, employing validated 2022 National Transit Database (NTD) data and the Florida Transit Information System (FTIS). The pool of potential peers consisted of transit agencies located in the southeastern United States, specifically those with coastal characteristics in their geographic profiles.

From the newly identified transit agencies, Breeze Transit (Sarasota, FL), LeeTran (Fort Myers, FL), Bayway (Pensacola, FL), GoLine (Vero Beach, FL), and Citrus Connection (Lakeland, FL) were chosen because they are situated within Florida, either in coastal counties or counties near Collier County. Additionally, CARTA (North Charleston, SC), ECAT (Pensacola, FL), and CCRTA (Hyannis, MA) were selected based on their recommendation as top peers to CAT according to the FTIS Urban iNTD tool. It is worth noting that ART was also recommended but was already included in the previous TDP peer group.

Overview of Methodology

The methodology for selecting the final peer group adheres to the guidelines outlined in the TCRP report. This process involves comparing data values for CAT and potential peer agencies using various indicators to calculate likeness scores for each indicator between CAT and each potential peer agency. The first stage was the primary review, which involved initially selecting indicators and scoring their likeness to CAT, then a comparison was made from the new peers against the previous TDP peers to determine whether the new peer group had a similar likeness and provided a good comparison overall to CAT. A secondary review was initiated to provide further insight to the primary likeness score where 2 new indicators were used. Results were then drawn utilizing the likeness score from the primary review, referencing the secondary review and weighing the location and demographic of the locations to determine the results. This comprehensive approach ensures a robust and well-rounded peer selection process. The methodology recognizes that peers will not be identical in all categories, accommodating variations and allowing for similarity in only a few key categories.

The methodology outlined in the TCRP report identifies 14 indicators for selecting peer agencies, primarily based on demographic characteristics and other exogenous variables, as utilized in the FTIS tool. While adhering to the TCRP guidance for peer selection, our approach slightly diverges in the factors used to assess potential peers. Rather than focusing primarily on exogenous variables, we prioritized various transit system performance measures as the primary criteria for peer selection. These performance indicators were considered more relevant for comparing peers, particularly in the context of enhancing transit system effectiveness. Nonetheless, demographic variables were still integrated into the peer selection process, although greater emphasis was placed on transit performance indicators.

As such, the potential peer agencies were analyzed based on the following 14 indicators: 8 operating characteristics and 6 exogenous variables.

- Operating Characteristic Indicators
    - Vehicles Operated in Maximum Service
    - Annual Passenger Miles Traveled
    - Annual Vehicle Revenue Miles
    - Annual Vehicle Revenue Hours
    - Number of Revenue Vehicles
    - Total Revenue Miles Operated
    - Total Operating Expense
    - Percent Service Demand Response
- Exogenous Variables
    - Service Area Population
    - Service Area Density
    - Service Area
    - Population Density
    - Urban Area Population
    - Population Growth Rate

The selection of these indicators for primary transit peer analysis ensures a comprehensive and robust assessment of both operational performance and contextual factors. Key operational characteristics such as vehicles operated in maximum service, annual passenger miles traveled, and total operating expenses provide critical insights into efficiency, capacity, and financial health within transit operations. Metrics like percent service demand response and annual vehicle revenue hours are essential for evaluating service quality and responsiveness to demand.

Given the growing emphasis on operational efficiency and the increasing adoption of demand response services, the percentage of service demand response serves as a particularly noteworthy indicator. It helps gauge where agencies stand in this evolving process, acknowledging disparities between agencies at different stages of implementing demand-responsive solutions.

Including exogenous variables such as service area population, density, and population growth rate contributes to a comprehensive understanding of the demographic and geographic contexts influencing these transit systems. This holistic approach ensures a well-rounded comparison, capturing both internal performance metrics and external factors that impact transit operations.

To create a chart that scores each category comparing CAT to other transit systems, a likeness score for each factor was calculated. This likeness score is a representation of the difference between two data



values. Data values that are identical between the peer agency and CAT result in a score of 0 (which is very rare and highly unlikely), while a score of 1 represents a percentage difference of 100%, indicating that the value for one agency is twice the amount of the other. In essence, the larger the difference between the values of the agencies, the higher the score, and vice versa. Peer agencies that have larger differences in values should be avoided and are undesirable due to greater dissimilarity between factors, but could still potentially be used with caution after screening for potential prominent differences that could deem them an unsuitable peer.

The likeness score is determined by calculating the percentage differences between the values for CAT and the peer agency, using the following formula:

$$\text{Likeness Score} = \frac{|F_{\text{cat}} - F_{\text{peer}}|}{\max(F_{\text{cat}}, F_{\text{peer}})}$$

Where:

- F_{cat} = the target agency's value for a given factor,
- F_{peer} = the peer agency's value for the same factor, and
- $\max(F_{\text{cat}}, F_{\text{peer}})$ = the maximum of the two values being compared.

As per the scoring guidance provided in the TCRP Report, the likeness scores are rated as such:

- **0.00 – 0.50: Good score**; none or small difference percentages, ideal matches to use
- **0.51 – 0.75: Satisfactory score**; smaller difference percentages, decent matches to use
- **0.76 – 0.99: Mediocre score**; larger difference percentages, could be used but check for anomalies
- **More than 1: Poor score**; large differences percentages, poor match, avoid using if possible

The 2022 data values for each of the 14 indicators and 17 transit agencies including CAT can be found in the data tables attached at the end of the memo, along with the corresponding likeness scores calculated for each indicator and agency. The likeness scores are highlighted according to the score breakdown as previously described, in that the good scores are in green, satisfactory scores are in yellow, decent scores that require more investigation are in orange, and poor scores are in red. This breakdown helps to easily identify which peers are more similar to CAT in which aspects.

Normalizing Cost Data

To accurately reflect cost values, cost data was normalized to reflect the impacts of differences in labor costs between geographical regions. It is important to consider labor cost differences as it allows for conclusions to be drawn with more certainty that the cost differences between agencies are due to internal agency efficiency variances rather than external cost variation. Labor costs are also typically the largest component of an agency's operating costs.

To adjust for differences in labor costs between counties, average labor wage rates were used to recalculate cost data. Annual average weekly wages for 2022 were obtained from the US Bureau of Labor Statistics Quarterly Census of Employment and Wages. All occupation types were included in the average calculation as agencies have no control over general labor environments in the county, which the cost data is being adjusted for, as opposed to the industry-specific labor rates that the agencies have some control



over. Including all occupations also allows for an agency to analyze how much of its labor is spent in comparison to the county's average wages, as well as to adjust its costs to reflect changes in the county's overall cost of living. The peer agencies' cost data was adjusted for labor cost differences by multiplying the labor cost portion of the agencies' operational expense values from NTD by the ratio between Collier's average labor cost over the peer agency county's average labor cost.

Comparison of Results with Previous TDP

As multiple transit systems were analyzed, calculations were performed to assess differences between the previous peer group from the 2020 TDP and the newly added peer agencies. For each potential peer, the sums of the exogenous variables and operating characteristics were calculated separately to identify which peers were most similar to CAT for each of the categories of indicators. An average score was then computed for easier comparison between the peer group from the previous TDP and the new potential peers using the following formula:

$$\text{Total Likeness Score} = \frac{\sum_{i=1}^{n} \text{Factor Likeness Score}_i}{n}$$

Where:

- **Total Likeness Score** = the average score representing overall similarity.
- **Factor Likeness Score** $_i$ = the likeness score for the i-th factor.
- n = the total number of factors.

The results indicated that the newly added peers had a higher average score in operational characteristics compared to the previous TDP peer group. While this suggests that the new peers are less similar to Collier County overall in terms of operational characteristics, it is still a valuable comparison. Focusing on operational characteristics is crucial as they directly impact service delivery and customer satisfaction. Additionally, the new peer group includes 9 peers compared to the 7 in the previous group, which can slightly elevate the average score due to the larger sample size.

Moreover, many of the new peers possess coastal features, which is a significant consideration for Collier County. These similarities in geographic characteristics can provide more relevant insights and best practices tailored to coastal areas. Exogenous factors such as demographics, which are major considerations for the new peer agencies, and operational characteristics such as service delivery modes and vehicle utilization are also critical. Coastal and geographic locations are necessary to consider due to their unique environmental and operational challenges. The exogenous variables for the new peer agencies are relatively low, with an average score of 2.89, indicating closer data values to that of Collier County for these external factors. This is beneficial as it ensures that the newly added peers reflect similar contextual influences, further supporting their relevance. Therefore, despite the higher scores in operational characteristics, the new peer agencies remain a relevant and useful selection for the TDP update.

Table 3-2: Average of Likeness Score Sums by Peer Group

Peer Group	Average for Operating Characteristics	Average for Exogenous Variables	Average for All Indicating Factors
Previous TDP Peers	2.45	3.67	6.99
New Peers Considered	2.87	2.89	5.75

Stage 2 Secondary Screening

A secondary screening of the potential peer group is recommended to fully account for all potential factors and allow for the most comparable peers to be chosen. Two new variables were introduced to the 16 peers: service area type and fare revenue. These secondary factors provide a more nuanced and comprehensive evaluation of transit performance, ensuring that peers are truly comparable in all relevant aspects to CAT.

Service area type significantly impacts performance and influences demand patterns and requirements. Of the eight service area types based on the FDOT TDP Handbook, six were characterized for the 16 peers and are as follows:

- Type 2: Agency provides service to multiple urban areas (may also include non-urban areas) and is the primary service provider within at least one urban area's central city.
- Type 3: Only agency operating within an urban area and has no non-urban service.
- Type 4: Agency is the primary service provider in the urban area's central city, where other agencies also provide service to portions of the urban area. Urban areas with multiple central cities (e.g., Tampa–St. Petersburg) may have more than one type 4 agency.
- Type 5: Agency provides service into an urban area's central city, but its primary service area does not include a central city.
- Type 6: Agency provides service within an urban area but does not provide service to a central city.
- Type 7: Only agency operating in an urban area and providing non-urban service.

Fare revenue values were evaluated to determine revenue generation, service affordability and accessibility, and subsidy requirements. Comparing agencies with similar fare revenue structures highlights effective fare policies and strategies, ensuring that transit services remain financially sustainable and accessible to the public.

By incorporating service area type and fare revenue as secondary screening factors, the analysis ensures a fair and comprehensive comparison with the primary agency, CAT. This approach helps compare the primary review of the operational characteristic and exogenous variables and identify truly comparable peers and provides a deeper understanding of the factors influencing transit performance, ultimately supporting more informed decision-making for CAT.

Final Peer Group Selection

An initial set of 16 potential peer agencies was identified for CAT (see Table 1-1). From this group, poor comparing peers were filtered out based on the overall likeness scores from the primary review, supplemented by additional likeness scores from the secondary review. In essence, peers with many high scoring factors or higher overall likeness scores were removed as it meant they have less similarity to CAT. 11 peers with the lowest scores in the primary review were selected as the CAT peer group. As shown in the likeness score tables attached at the end of the memo, the potential peers all do fairly well as the majority of the individual factors score well (below 0.5). The exogenous factors appear to compare more poorly in contrast to the operating factors, as there are more satisfactory and mediocre scores. There are very few poor-scoring factory-agency pairs; ART and GTA with poor scores for the percent service demand



response factor, and The M and The Wave Transit System have poor scores for the population growth rate factor. As such, these agencies were removed from the final peer group.

The last data table attached at the end of the memo shows averages and sums of the likeness scores grouped by operational, exogenous, and all factors, as well as by peer group. The likeness scores in each column are formatted in order from the lowest and best scores to the highest and worst scores in a green to red color scale. This table depicts which agencies score better across all factors. Most of the peer agencies from the previous TDP scored poorly for exogenous and all factors. The M, TTA, and ART consistently had poor scores across all groups, and were removed from consideration for the final peer group, along with GCT and PCPT.

The secondary review, which accounted for service area type and fare revenue, was necessary but less significant than operational characteristics, from the primary review, in this TDP. Consequently, if the secondary review led to a substantial increase in the peer likeness score, it was disregarded. This decision was based on the fact that only two indicators were used in the secondary review, making them less critical compared to the primary review.

Subsequently, upon conducting the secondary review, one peer agency was found to have incomplete NTD data. The 2022 NTD data for GoLine was missing the fare revenue information, which is one of the two indicators used in the secondary review. As such, this agency was also eliminated from the final peer group.

The following table lists the final 10 selected peers, their likeness score, and their selection reasoning.

Table 3-3: Average of Likeness Score Sums by Peer Group.

Peer Agency	Likeness Score	Reasoning for Top 10 Selection
Breeze Transit (Sarasota County Area Transit), Sarasota, FL	6.98	Likeness score and location of the peer is desirable.
LeeTran (Lee County Transit), Fort Myers, FL	7.80	Likeness score from the primary review was substantially lower and location of the peer is desirable.
Bayway (Bay County Transportation), Pensacola, FL	6.03	Likeness score and location of the peer is desirable.
ECAT (Escambia County Area Transit Authority), Pensacola, FL	6.05	Likeness score
CCRTA (Cape Cod Regional Transit Authority), Hyannis, MA	6.30	Likeness score
CARTA (Charleston Area Regional Transportation Authority), North Charleston, SC	6.06	Likeness score
Citrus Connection (Lakeland Area Mass Transit District), Lakeland, FL	5.68	Likeness score and location of the peer is desirable.
The Wave (Cape Fear Public Transportation Authority), Wilmington, NC	5.49	Likeness score
The Wave Transit System, City of Mobile, AL	6.81	Likeness score
PCPT (Pasco County Public Transportation), New Port Richey, FL	6.35	Likeness score

It is important to note that three of the selected peers were peers from the previous TDP: The Wave Transit System, PCPT, and The Wave, while the remaining peers are new.

Characteristics of Peer Systems

The following are brief descriptions of the transit agencies in the final new peer group for comparative purposes. The peer and trend analysis were conducted with this set of peers. The data values in the agency profiles were all obtained from NTD 2022 data. The total operating cost values included in these agency profiles are the original cost values from NTD and are not adjusted for labor cost differences. The recalculated operating costs used for likeness scoring can be found in Appendix A. The service type information in the profiles was gathered from each transit agency's respective website.

Baseline Transit Agency: CAT (Collier Area Transit), Naples, FL
Services provided: Fixed-route bus and paratransit services
Service area population (2022): 384,902 people
Service area population density (2022): 172 persons per square mile
Annual revenue hours (2022): 124,701 hours
Annual ridership (2022): 746,338 unlinked trips
Operating costs (2022): $12,194,270
Fleet (2022): 53 vehicles at maximum service

rideCAT
COLLIER AREA TRANSIT

Peer Transit Agency: Breeze Transit (Sarasota County Area Transit), Sarasota, FL
Services provided: Fixed-route bus, trolley, on-demand rideshare, and paratransit services
Service area population (2022): 517,423 people
Service area population density (2022): 848 persons per square mile
Annual revenue hours (2022): 304,917 hours
Annual ridership (2022): 2,080,349 unlinked trips
Operating costs (2022): $27,790,551
Fleet (2022): 107 vehicles at maximum service

Breeze

Peer Transit Agency: LeeTran (Lee County Transit), Fort Myers, FL

Services provided: Fixed-route bus, trolley, ADA paratransit, and transportation disadvantaged services, as well as an employer vanpool program

Service area population (2022): 802,178 people

Service area population density (2022): 978 persons per square mile

Annual revenue hours (2022): 303,204 hours

Annual ridership (2022): 2,231,974 unlinked trips

Operating costs (2022): $28,031,267

Fleet (2022): 91 vehicles at maximum service

Peer Transit Agency: Bayway (Bay County Transportation), Pensacola, FL

Services provided: Fixed-route bus, rideshare, and on-demand services

Service area population (2022): 179,168 people

Service area population density (2022): 236 persons per square mile

Annual revenue hours (2022): 55,418 hours

Annual ridership (2022): 349,281 unlinked trips

Operating costs (2022): $5,098,436

Fleet (2022): 26 vehicles at maximum service

Peer Transit Agency: ECAT (Escambia County Area Transit Authority), Pensacola, FL

Services provided: Fixed-route bus, seasonal trolley, and ADA paratransit services

Service area population (2022): 241,661 people

Service area population density (2022): 1,280 persons per square mile

Annual revenue hours (2022): 156,107 hours

Annual ridership (2022): 842,731 unlinked trips

Operating costs (2022): $13,589,817

Fleet (2022): 86 vehicles at maximum service

Peer Transit Agency: CCRTA (Cape Cod Regional Transit Authority), Hyannis, MA

Services provided: Fixed-route bus, on-demand, ride-hail, seasonal train, reservable medical transportation, and ADA paratransit services

Service area population (2022): 228,996 people

Service area population density (2022): 582 persons per square mile

Annual revenue hours (2022): 178,475 hours

Annual ridership (2022): 605,951 unlinked trips

Operating costs (2022): $17,215,743

Fleet (2022): 133 vehicles at maximum service

Peer Transit Agency: CARTA (Charleston Area Regional Transportation Authority), North Charleston, SC

Services provided: Fixed-route bus, fixed-route shuttle, seasonal shuttle, on-demand, and ADA paratransit services

Service area population (2022): 356,082 people

Service area population density (2022): 2,580 persons per square mile

Annual revenue hours (2022): 230,727 hours

Annual ridership (2022): 2,212,089 unlinked trips

Operating costs (2022): $22,952,085

Fleet (2022): 77 vehicles at maximum service

Peer Transit Agency: Citrus Connection (Lakeland Area Mass Transit District), Lakeland, FL

Services provided: Fixed-route bus, ADA paratransit, and transportation disadvantaged Medicare transportation services

Service area population (2022): 724,777 people

Service area population density (2022): 9,413 persons per square mile

Annual revenue hours (2022): 157,376 hours

Annual ridership (2022): 693,018 unlinked trips

Operating costs (2022): $21,434,610

Fleet (2022): 71 vehicles at maximum service

Peer Transit Agency: The Wave (Cape Fear Public Transportation Authority), Wilmington, NC
Services provided: Fixed-route bus service and mobility assistance program
Service area population (2022): 230,310 people
Service area population density (2022): 1,152 persons per square mile
Annual revenue hours (2022): 102,655 hours
Annual ridership (2022): 710,993 unlinked trips
Operating costs (2022): $8,592,522
Fleet (2022): 43 vehicles at maximum service

Peer Transit Agency: The Wave Transit System, City of Mobile, AL
Services provided: Fixed-route bus service and mobility assistance program
Service area population (2022): 203,900 people
Service area population density (2022): 1,488 persons per square mile
Annual revenue hours (2022): 114,952 hours
Annual ridership (2022): 495,899 unlinked trips
Operating costs (2022): $10,804,979
Fleet (2022): 37 vehicles at maximum service

Peer Transit Agency: PCPT (Pasco County Public Transportation), New Port Richey, FL
Services provided: Fixed-route bus and ADA paratransit services
Service area population (2022): 584,067 people
Service area population density (2022): 782 persons per square mile
Annual revenue hours (2022): 110,773 hours
Annual ridership (2022): 601,717 unlinked trips
Operating costs (2022): $10,599,068
Fleet (2022): 42 vehicles at maximum service

Primary Review Data Values for All Factors and Potential Peers

Indicating Factor Values for Operating Characteristics										
Agency Name	Location	Peer Group	Vehicles Operated in Maximum Service	Annual Passenger Miles Traveled	Annual Vehicle Revenue Miles	Annual Vehicle Revenue Hours	Number of Revenue Vehicles	Total Revenue Miles Operated	Total Operating Expenses	Percent Service Demand Response
CAT (Collier Area Transit)	**Naples, FL**	**Target**	53	6,128,249	2,371,843	124,701	73	$ 2,371,843	$ 12,194,270	58%
The M (Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	25	1,567,963	1,382,282	86,390	28	$ 1,382,282	$ 9,987,208	24%
TTA (Tri-State Transit Authority)	Huntington, WV	Previous TDP	33	3,874,462	1,183,447	70,293	55	$ 1,183,447	$ 6,625,367	30%
The Wave Transit System	City of Mobile, AL	Previous TDP	37	3,380,866	1,605,194	114,952	55	$ 1,605,194	$ 10,804,979	46%
ART (Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	19	4,039,338	1,287,477	100,062	33	$ 1,287,477	$ 10,550,615	0%
GCT (Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	54	10,719,532	2,388,912	134,989	92	$ 2,388,912	$ 22,947,660	9%
PCPT (Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	42	3,564,565	1,852,338	110,773	63	$ 1,852,338	$ 10,599,068	40%
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	43	2,108,293	1,505,790	102,655	65	$ 1,505,790	$ 8,592,522	44%
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	107	10,819,212	4,551,933	304,917	150	$ 4,551,933	$ 27,790,551	69%
LeeTran (Lee County Transit)	Fort Myers, FL	New	91	12,768,415	4,756,395	303,204	141	$ 4,756,395	$ 28,031,267	51%
Bayway (Bay County Transportation)	Pensacola, FL	New	26	2,396,995	752,218	55,418	40	$ 2,202,931	$ 13,589,817	48%
GoLine (Indian River County)	Vero Beach, FL	New	27	5,765,570	1,210,921	71,197	37	$ 1,210,921	$ 5,402,008	48%
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	71	4,147,701	2,372,575	157,376	94	$ 2,372,575	$ 21,434,610	42%
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	New	77	11,394,692	3,152,002	230,727	134	$ 3,152,002	$ 22,952,085	26%
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	New	86	4,610,071	2,202,931	156,107	90	$ 2,202,931	$ 13,589,817	48%
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	New	133	7,170,207	2,826,345	178,475	192	$ 2,826,345	$ 17,215,743	59%
GTA (Greensboro Transit Authority)	City of Greensboro, NC	New	76	9,159,005	3,695,161	257,346	104	$ 3,695,161	$ 27,555,354	0%

Indicating Factor Values for Exogenous Variables								
Agency Name	Location	Peer Group	Service Area	Urban Area Population	Population Density	Population Growth Rate	Service area population	Service area density
CAT (Collier Area Transit)	**Naples, FL**	**Target**	2,025	449,527	1,850	5.60%	348,902	172
The M (Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	135	251,158	1,731	-1.25%	205,764	1,524
TTA (Tri-State Transit Authority)	Huntington, WV	Previous TDP	92	202,754	1,573	1.30%	144,339	1,569
The Wave Transit System	City of Mobile, AL	Previous TDP	137	320,855	1,453	-0.33%	203,900	1,488
ART (Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	45	294,013	1,183	2.88%	93,350	2,074
GCT (Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	143	5,180,179	2,029	1.57%	702,116	4,910
PCPT (Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	747	2,861,173	2,953	2.81%	584,067	782
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	200	268,625	1,888	5.21%	230,310	1,152
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	610	825,572	2,042	5.97%	517,423	848
LeeTran (Lee County Transit)	Fort Myers, FL	New	820	654,405	1,972	9.21%	802,178	978
Bayway (Bay County Transportation)	Pensacola, FL	New	758	398,813	1,519	2.21%	179,168	236
GoLine (Indian River County)	Vero Beach, FL	New	217	186,637	1,759	7.01%	163,662	754
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	77	280,346	1,921	0.87%	724,777	9,413
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	New	138	706,884	2,085	3.23%	356,082	2,580
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	New	189	398,813	1,519	2.21%	241,661	1,280
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	New	394	313,064	917	3.23%	228,996	582
GTA (Greensboro Transit Authority)	City of Greensboro, NC	New	136	338,928	2,050	2.42%	297,878	2,190

Primary Review Likeness Scores for All Factors and Potential Peers

Likeness Score for Operating Characteristics												
Agency Name	Location	Peer Group	Vehicles Operated in Maximum Service	Annual Passenger Miles Traveled	Annual Vehicle Revenue Miles	Annual Vehicle Revenue Hours	Number of Revenue Vehicles	Total Revenue Miles Operated	Total Operating Expenses	Percent Service Demand Response	Average Operational Likeness Score	Total Operational Likeness Score
CAT (Collier Area Transit)	**Naples, FL**	**Target**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
The M (Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	0.53	0.74	0.42	0.86	0.62	0.42	0.11	0.59	0.53	2.59
TTA (Tri-State Transit Authority)	Huntington, WV	Previous TDP	0.38	0.37	0.50	0.82	0.25	0.50	0.37	0.48	0.46	2.93
The Wave Transit System	City of Mobile, AL	Previous TDP	0.30	0.45	0.32	0.89	0.25	0.32	0.05	0.21	0.35	2.04
ART (Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	0.64	0.34	0.46	0.88	0.55	0.46	0.13	1.00	0.56	3.47
GCT (Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	0.02	0.43	0.01	0.91	0.21	0.01	0.47	0.85	0.36	2.44
PCPT (Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	0.21	0.42	0.22	0.89	0.14	0.22	0.01	0.31	0.30	1.78
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	0.19	0.66	0.37	0.88	0.11	0.37	0.28	0.24	0.39	1.87
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	0.50	0.43	0.48	0.59	0.51	0.48	0.57	0.16	0.47	3.72
LeeTran (Lee County Transit)	Fort Myers, FL	New	0.42	0.52	0.50	0.59	0.48	0.50	0.60	0.12	0.47	3.73
Bayway (Bay County Transportation)	Pensacola, FL	New	0.51	0.61	0.68	0.56	0.45	0.07	0.11	0.17	0.39	3.16
GoLine (Indian River County)	Vero Beach, FL	New	0.49	0.06	0.49	0.43	0.49	0.49	0.56	0.17	0.40	3.18
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	0.25	0.32	0.00	0.21	0.22	0.00	0.50	0.28	0.22	1.78
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	New	0.31	0.46	0.25	0.46	0.46	0.25	0.47	0.55	0.40	3.21
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	New	0.38	0.25	0.07	0.20	0.19	0.07	0.17	0.17	0.19	1.50
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	New	0.60	0.15	0.16	0.30	0.62	0.16	0.30	0.02	0.29	2.30
GTA (Greensboro Transit Authority)	City of Greensboro, NC	New	0.30	0.33	0.36	0.52	0.30	0.36	0.06	1.00	0.40	3.22

Likeness Score for Exogenous Variables

Agency Name	Location	Peer Group	Service Area	Urban Area Population	Population Density	Population Growth Rate	Service area population	Service area density	Average Exogenous Likeness Score	Total Exogenous Likeness Score
CAT (Collier Area Transit)	**Naples, FL**	**Target**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
The M (Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	0.93	0.44	0.06	1.22	0.41	0.89	0.66	3.96
TTA (Tri-State Transit Authority)	Huntington, WV	Previous TDP	0.95	0.55	0.15	0.77	0.59	0.89	0.65	3.90
The Wave Transit System	City of Mobile, AL	Previous TDP	0.93	0.29	0.21	1.06	0.42	0.88	0.63	3.79
ART (Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	0.98	0.35	0.36	0.49	0.73	0.92	0.64	3.82
GCT (Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	0.93	0.91	0.09	0.72	0.50	0.96	0.69	4.12
PCPT (Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	0.63	0.84	0.37	0.50	0.40	0.78	0.59	3.53
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	0.90	0.40	0.02	0.07	0.34	0.85	0.43	2.58
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	0.70	0.46	0.09	0.06	0.33	0.80	0.41	2.43
LeeTran (Lee County Transit)	Fort Myers, FL	New	0.60	0.31	0.06	0.39	0.56	0.82	0.46	2.75
Bayway (Bay County Transportation)	Pensacola, FL	New	0.63	0.11	0.18	0.61	0.49	0.27	0.38	2.28
GoLine (Indian River County)	Vero Beach, FL	New	0.89	0.58	0.05	0.21	0.53	0.77	0.51	3.04
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	0.96	0.38	0.04	0.85	0.52	0.98	0.62	3.72
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	New	0.93	0.36	0.11	0.42	0.02	0.93	0.46	2.79
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	New	0.91	0.11	0.18	0.61	0.31	0.87	0.50	2.98
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	New	0.81	0.30	0.50	0.42	0.34	0.70	0.51	3.09
GTA (Greensboro Transit Authority)	City of Greensboro, NC	New	0.93	0.25	0.10	0.57	0.15	0.92	0.48	2.91

Agency Name	Location	Peer Group	Average Operational Likeness Score	Sum of Operational Likeness Scores	Average of Operational Sum by Peer Group	Average Exogenous Likeness Score	Sum of Exogenous Likeness Scores	Average of Exogenous Sum by Peer Group	Average Likeness Score for All Factors	Total Sum of Likeness Score for All Factors	Average of Total Sum by Peer Group
CAT (Collier Area Transit)	**Naples, FL**	**Target**	0	0	0	0	0	0	0	0	0
The M (Montgomery Area Transit)	City of Montgomery, AL	Previous TDP	0.53	2.59		0.66	3.96		0.59	8.24	
TTA (Tri-State Transit Authority)	Huntington, WV	Previous TDP	0.46	2.93		0.65	3.90		0.54	7.57	
The Wave Transit System	City of Mobile, AL	Previous TDP	0.35	2.04		0.63	3.79		0.47	6.59	
ART (Asheville Redefines Transit)	City of Asheville, NC	Previous TDP	0.56	3.47	2.45	0.64	3.82	3.67	0.59	8.27	7.04
GCT (Gwinnett County Transit)	Lawrencevill, GA	Previous TDP	0.36	2.44		0.69	4.12		0.50	7.01	
PCPT (Pasco County Public Transportation)	New Port Richey, FL	Previous TDP	0.30	1.78		0.59	3.53		0.42	5.94	
The Wave (Cape Fear Public Transportation Authority)	Wilmington, NC	Previous TDP	0.39	1.87		0.43	2.58		0.40	5.67	
Sarasota Breeze (Sarasota County Area Transit)	Sarasota, FL	New	0.47	3.72		0.41	2.43		0.44	6.16	
LeeTran (Lee County Transit)	Fort Myers, FL	New	0.47	3.73		0.46	2.75		0.46	6.48	
Bayway (Bay County Transportation)	Pensacola, FL	New	0.39	3.16		0.38	2.28		0.39	5.44	
GoLine (Indian River County)	Vero Beach, FL	New	0.40	3.18		0.51	3.04		0.44	6.22	
Citrus Connection (Lakeland Area Mass Transit District)	Lakeland, FL	New	0.22	1.78	2.87	0.62	3.72	2.89	0.39	5.51	5.75
CARTA (Charleston Area Regional Transportation Authority)	North Charleston, SC	New	0.40	3.21		0.46	2.79		0.43	5.99	
ECAT (Escambia County Area Transit Authority)	Pensacola, FL	New	0.19	1.50		0.50	2.98		0.32	4.48	
CCRTA (Cape Cod Regional Transit Authority)	Hyannis, MA	New	0.29	2.30		0.51	3.09		0.38	5.39	
GTA (Greensboro Transit Authority)	City of Greensboro, NC	New	0.40	3.22		0.48	2.91		0.44	6.13	

EXECUTIVE SUMMARY
Reports and Presentations
Item 6b
Zero Emissions Transition Plan Update

Objective:

To provide an update on the Zero Emissions Transition Plan.

Considerations:

CAT Staff, the Collier Metropolitan Planning Organization (MPO), and consulting firm Benesch have recently begun the process to develop a Zero-Emissions Transition Plan. The Zero-Emissions Transition Plan is a strategic initiative by CAT looking to transition our existing fleet of diesel busses, into a mixed fleet including zero or low-emissions alternatives. This plan is critical to have in place before applying for grants related to zero or low-emissions purchases.

Through this plan, we aim to assess the financial, operational, and infrastructural changes needed to adopt these technologies into our fleet. The goal is to provide a path forward to include these vehicles into our everyday fleet in a cost-effective and operationally efficient manner.

Recommendation:

None

Attachments:

1. State of ZEV Draft

Prepared by: _____ Date: 12/13/24
Alexander Showalter, Planner II

Approved by: _____ Date: 12/13/2024
Brian Wells, PTNE Division Director

1 INTRODUCTION

The transit industry is shifting from traditional diesel vehicles to various alternative fuel technologies due to a combination of increasing environmental awareness, availability and advancement of alternative fuel technologies, and federal incentives (i.e., grant funding). Collier Area Transit, operating as CAT, is exploring options related to replacing its fleet with alternative fuel vehicles.

In 2021, the Federal Transit Administration (FTA) announced that no-emission projects seeking funding under the Grants for Buses and Bus Facilities Competitive Program (49 U.S.C. § 5339(b)) and the Low- or No-Emission Program (49 U.S.C. § 5339(c)) must have a Zero-Emission Transition Plan (ZETP). This report substantially meets this requirement in support of future FTA grant funding requests made by Collier County.

A ZETP must meet the following six requirements:

- Element 1 | Demonstrate a long-term fleet management plan with a strategy for how the applicant intends to use the current request for resources and future acquisitions.
- Element 2 | Address the availability of current and future resources to meet costs for the transition and implementation.
- Element 3 | Consider policy and legislation impacting relevant technologies.
- Element 4 | Include an evaluation of existing and future facilities and their relationship to the technology transition.
- Element 5 | Describe the partnership of the applicant with the utility or alternative fuel provider.
- Element 6 | Examine the impact of the transition on the applicant's current workforce by identifying skill gaps, training needs, and retraining needs of the existing workers of the applicant to operate and maintain zero-emission vehicles and related infrastructure and avoid displacement of the existing workforce.

The purpose of this report is to develop a ZETP based on a selection of alternative fuel technologies identified in the following chapters and to meet the requirements of the FTA for competitive grants through the Low- or No-Emission Grant program. CAT has determined that a balanced mix of technologies will be the goal of its transition plan, the details of which are documented in this ZETP. Nearly _____% of the current diesel vehicle fleet will transition to low-emission or zero-emission vehicles within the next 12 years. The agency finds it appropriate that _____% of its fleet remain composed of diesel vehicles as these vehicles would be critical to support mobility during power outages, especially after natural disasters such as hurricanes, which are common in the region.

2 STATE OF ZERO EMISSION VEHICLES

The State of Zero Emission Vehicles (ZEVs) chapter explores various technology options to determine which technology or technologies are most appropriate for the agency to consider moving forward. This chapter documents the benefits and drawbacks of popular alternative fuel technologies and how they compare to diesel vehicles.

2.1 Recent Trends in Alternative Fuel Technologies

There are two broad categories of alternative fuel technologies: low-emission and zero-emission. Low-emission technologies refer to any alternative technology or alternative fuel that emit lower amounts of harmful tailpipe emissions than diesel. Zero-emission (also known as no-emission) technologies do not rely on fossil fuels for operation and have zero (or nearly zero) harmful tailpipe emissions. Generally, these designations only account for the emissions produced during the usable lifecycle of vehicles and not the emissions produced during the production, disposal of the vehicles, or the production of the fuel source. **Table 2-1** lists the selection of alternative fuel technologies discussed in this report by their respective emission category.

TABLE 2-1 CATEGORIZATION OF MAJOR ALTERNATIVE FUEL TECHNOLOGIES

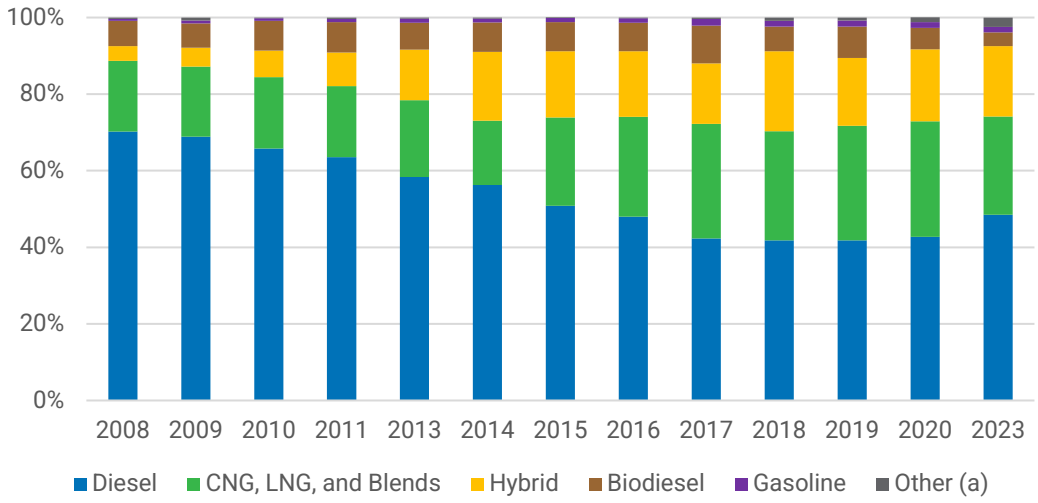
Low-Emission Technologies	Zero-Emission Technologies
• Biodiesel • Compressed natural gas (CNG) • Diesel and battery electric (hybrid) • Gasoline • Liquified natural gas (LNG) • Propane	• Battery electric • Hydrogen fuel cell electric (FCE)

Note: While the term "hybrid technology" can refer to a myriad of combinations of fuels, for the purposes of this report, hybrid refers solely to a combination of diesel and battery electric technologies.

There are multiple fuel alternatives to diesel, and each has evolved at a different pace. The American Public Transportation Association (APTA) maintains a database of more than 450 transit agencies across the United States. The database has helped track various trends in public transportation including fleet fuel mix. **Figure 2-1** shows the changes in fuel mix for buses (excluding commuter bus) between 2008 and 2023. It should be noted that transit agencies voluntarily provide data to APTA and may not update it every year; therefore, data is only as accurate as the agencies reporting.

On average, diesel buses dropped by 1.5 percent annually between 2008 and 2023, beginning with a market share of 70 percent to a current share of 49 percent. The largest diesel decrease occurred between 2011 and 2018. Biodiesel adoption has wavered, with popularity in the past decade peaking at 9.9 percent in 2017 compared to the most recent figure of 3.6 percent.

FIGURE 2-1: BUS VEHICLE POWER SOURCES



Source: APTA Public Transportation Vehicle Database Appendix A (2023)
(a) Includes battery-electric, hydrogen, and propane powered buses
Note: Data for 2012 is not available.

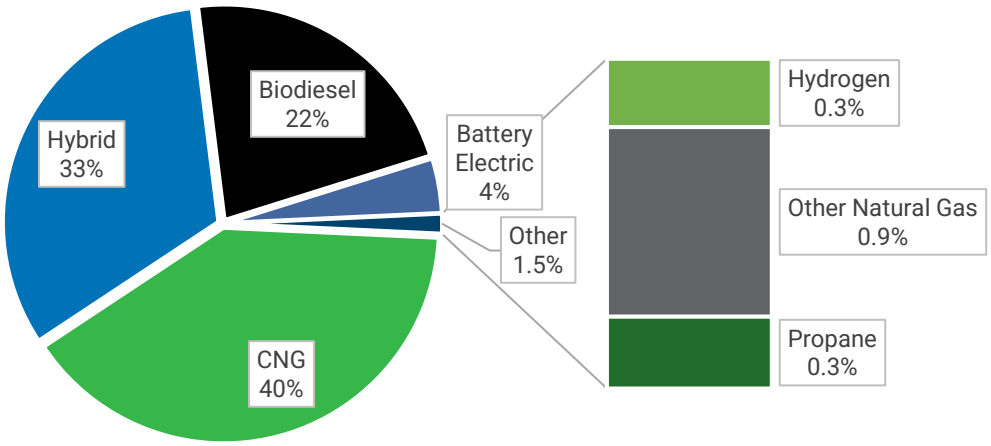
The first alternative fuel technology to gain prominence among transit fleets was compressed natural gas, which increased from 3 percent of transit vehicles to 13 percent between 1996 and 2005. A greater increase in CNG vehicles can be observed between 2015 and 2019, growing about 7 percent annually to an overall 30 percent share in fuel mix, making it the most employed alternative fuel on the market.

Hybrid vehicles (i.e., diesel and battery electric) have had a slow market penetration, with the first models introduced in the late 1990s. However, hybrid vehicles quickly gained traction between 2008 and 2014, growing from an overall fuel mix share of 3.8 percent to 17.9 percent. In 2023, the overall fuel mix share of hybrid vehicles was 18.3 percent.

Other alternative fuel technologies have made marginal market penetration, only recently surpassing 2% of overall fuel mix in 2023. The other alternatives category includes battery-electric, hydrogen, and propane. Propane as a fuel alternative is often used for smaller buses while gasoline is relatively unpopular due to its fuel compression properties and its lack of emission benefits over diesel. The adoption rates of these and other fuel alternative technologies have been impacted either by their level of maturity, cost, or reliability.

Figure 2-2 shows the current share that each alternative fuel technology has achieved among bus fleets in the U.S. in 2024. The most popular alternative fuel technology is CNG. Approximately 40 percent of the alternative fuel fleet is composed of CNG buses, followed by hybrid buses at 33 percent. Zero-emission buses make up close to 4 percent of all bus fleets, with 3 percent battery electric buses and less than 1 percent being hydrogen buses. Around 22 percent of buses use biodiesel and a combined 1.5 percent use some other fuel alternative such as propane, hydrogen, or another natural gas combination.

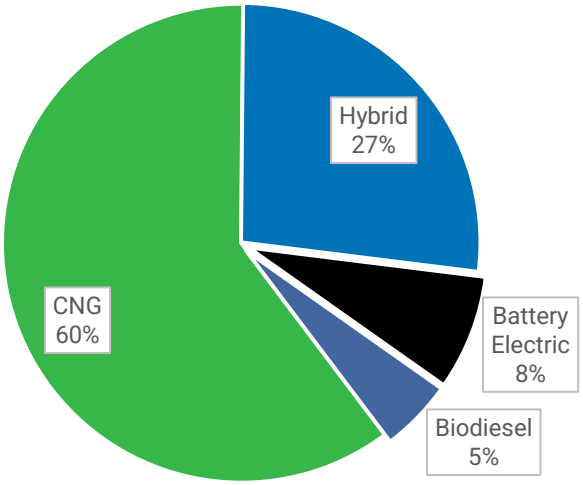
FIGURE 2-2: MIX OF ALTERNATIVE FUELS FOR US BUSES (2024)



Source: APTA Public Transportation Vehicle Database (2024)
Other Natural Gas includes compressed natural gas & diesel, compressed natural gas & gasoline, liquified natural gas propane & diesel, propane & gasoline, propane & compressed natural gas, liquified natural gas & diesel

Similar to the national trend, transit agencies in Florida are increasing their adoption of alternative fuel technologies. **Figure 2-3** shows the alternative fuel mix across buses in Florida in 2024. Among the various fuel alternative fuel technologies, CNG buses are the most common, followed by hybrid buses and battery electric buses.

FIGURE 2-3: MIX OF ALTERNATIVE FUELS FOR FLORIDA BUSES (2024)



Source: APTA Public Transportation Vehicle Database (2024)

The continued transition away from diesel fuel is expected to accelerate in the coming decade due to state and federal initiatives incentivizing conversion. Zero-emission fuels remain challenging to adopt, although their current fuel mix share continues to grow slowly. It is expected that these technologies will gain greater traction in the coming decades as their respective technologies mature.

Due to their low adoption rates, lack of readily available data and/or relatively small reductions in emissions, gasoline, propane, and LNG will not be explored further in this report. **Section 2.2** provides

greater detail on five alternative fuel technologies: hybrid diesel-electric, CNG, biodiesel, battery electric and hydrogen FCE. Hybrid, CNG and biodiesel fuel technologies are widely used by transit agencies in Florida. Battery electric and hydrogen FCE vehicles have not been adopted very broadly; however, they are projected to become more popular and are becoming more affordable.

2.2 Alternative Fuel Technology Profiles

This section provides detailed profiles for each fuel type. Profiles include data related to the current state of the technology, a basic understanding of the fuel type, performance and reliability, and an evaluation of their impact on infrastructure and operations. Diesel is included below for comparison purposes. The various fuel alternative technologies are presented by category, starting with the low-emission category, and ending with the zero-emission category.

2.2.1 Technology Profiles

2.2.1.1 Diesel

Diesel engines have been used for propulsion since the early 20th century. The maturity and reliability of this fuel has made it the primary choice for bus fleet propulsion over the last century. Fuel consumption increased in the later 20th century as modern features were introduced in bus models such as air conditioning, heating, wheelchair lifts and other features that required more engine horsepower. In recent decades, federal regulations and technological advancements have reduced the impact of the fuel's emissions. Current improvements in diesel technology are focused on increased fuel efficiency and a reduction in emissions.

The latest changes in U.S. diesel engine standards. occurred between 2007 and 2010, when the Environmental Protection Agency (EPA) aimed for the reduction of diesel emissions in a twofold approach. First, it required the reduction of sulfur content in diesel fuel by 97 percent. Second, it required vehicle exhaust emission controls like particulate filters and exhaust recirculation that reduce nitrogen oxide (NOx) and particulate matter (PM) emissions. The latter approach required improvements in engine design, leading to higher vehicle costs, and added parts for bus repair.

In March 2022, the EPA proposed rules to further reduce air pollution by lowering the emissions of NOx and PM from diesel engines to be introduced in diesel vehicles by model year 2027. Finally, the EPA suggests that for diesel vehicles in 2027, useful life periods and mileages be extended to reflect real-world usage, to extend the emissions durability requirement for heavy-duty engines and to ensure certified emission performance is maintained throughout more of an engine's operational life. These measures will likely impact bus operators by lengthening vehicle life spans, challenging current replacement schedules, increasing maintenance periods, and raising costs due to additional parts for emission control maintenance.



Breeze Diesel Fueling Station
Source: Benesch

2.2.1.2 Biodiesel

Biodiesel, not to be confused with renewable or green diesel, is a low-emission diesel alternative produced through transesterification, where biodegradable elements such as feedstock or restaurant grease react to alcohol in the presence of a catalyst such as lye. The resulting biodiesel is referred to as B100, an acronym that indicates the percentage of biodiesel present. Pure B100 usage is uncommon; usually, biodiesel is blended with regular diesel to reduce the diesel content in favor of a more biodegradable alternative. Popular biodiesel blends currently available include five percent, 10 percent, and 20 percent forms known as B05, B10, and B20.



Source: National Renewable Energy Laboratory. www.nrel.gov

B20 is the more broadly available and used blend today, higher grades are expected to become more common. Biodiesel functions similarly to diesel in compression-ignition engines. While current diesel buses can use certain biodiesel blends, higher blends may require engine upgrades, as pure biodiesel can degrade rubber parts, affecting hoses and gaskets, and causing potential leaks. Biodiesel's lower oxidative stability can also lead to degradation with metals like copper, lead, tin, or zinc, creating sediment that may clog filters.

A cetane number (CN) is assigned to diesel and biodiesel fuels as a measure for identifying fuel ignition delay and related engine performance. Biodiesel fuels generally have a higher CN value than diesel and are considered a lower performing alternative which produces less energy. Biodiesel contains about 8 percent less energy per gallon than diesel. Nonetheless, fuel emissions are notably lower when using biodiesel blends and engines using them are notably cleaner because of a reduced amount of particulate matter compared to diesel.

In freezing temperatures, biodiesel may congeal due to grease-based components, however this is not a concern in Florida's subtropical climate.

Biodiesel blends below B20 are widely available and distributed and require no new infrastructure. The main considerations for any biodiesel fuel blend include specifying which biodiesel feedstock to use given the identified performance and maintenance concerns.

2.2.1.3 Compressed Natural Gas

CNG buses use natural gas as a low-emission fuel for internal combustion, similar to diesel buses but with key differences in fuel type. First, because natural gas is in a gaseous state, it must be compressed for optimal use. CNG is considered one the most mature and well-established fuels available to transit agencies, but its gaseous state has limitations.

CNG contains less energy than diesel, and its high-pressure cylinders connect to the engine via a fuel line with multiple valves and regulators. CNG engines require different mechanical parts than diesel, expanding the parts inventory and requiring specialized staff training.

CNG is considered a low-emission fuel alternative as its main emission is limited to NOx. This fuel alternative is flammable and, because it is an odorless and colorless gas, an additive provides a

distinct odor to help detect leaks. Garages supporting CNG vehicles require an extensive evaluation to adhere to guidance from the National Fire Protection Association (NFPA). Additionally, maintenance facilities where CNG is stored or CNG vehicles are repaired require increased ventilation and gas detection systems that can detect and control gas leaks. While CNG may require additional safety infrastructure, issues related to gas leaks are rare.

CNG fueling can occur off site or on site. CNG fueling is a time-consuming process. If a fleet is larger, CNG is ideally produced or pumped on site as it increases operational efficiency. The availability of CNG is contingent upon the local natural gas utility provider. Collier County may coordinate with the Florida Power and Light (FPL) subsidiary, FPL Energy Services (FPLES), for natural gas services. Alternatively, private companies such as Trillium or Nopetro can provide CNG to transit agencies. On-site CNG infrastructure involves substantial investment, including a gas dryer, compressor, and storage system, with costs ranging from $500,000 to $2 million depending on size and application[1].

2.2.1.4 Hybrid

Hybrid, specifically diesel-electric hybrid, buses are low-emission vehicles that combine an electric motor with an internal combustion engine. While hybrid buses have an electric component, they operate more like diesel buses than battery-electric buses and don't require external charging, instead using a rechargeable battery alongside traditional mechanical parts.



There are two types of propulsion system configurations in a hybrid bus:

- **Parallel hybrid:** Uses both the electric motor and internal combustion engine, switching between them based on driving conditions. Mostly, the electric motor is used in stop-and-go traffic, while the combustion engine powers the bus at higher speeds, such as on highways.
- **Series hybrid:** Relies solely on the electric motor for propulsion, with power supplied by a battery or a generator driven by an internal combustion engine. This configuration is better suited for stop-and-go conditions.

Concerns have been raised about the impacts related to the mining of lithium, a component required in vehicle batteries. There are two primary concerns: (1) environmental destruction from drilling and mining and (2) water contamination from the refining process. Some environmental advocates contend that the negative impacts created by the mining process may outweigh the environmental benefits achieved by battery powered vehicles.

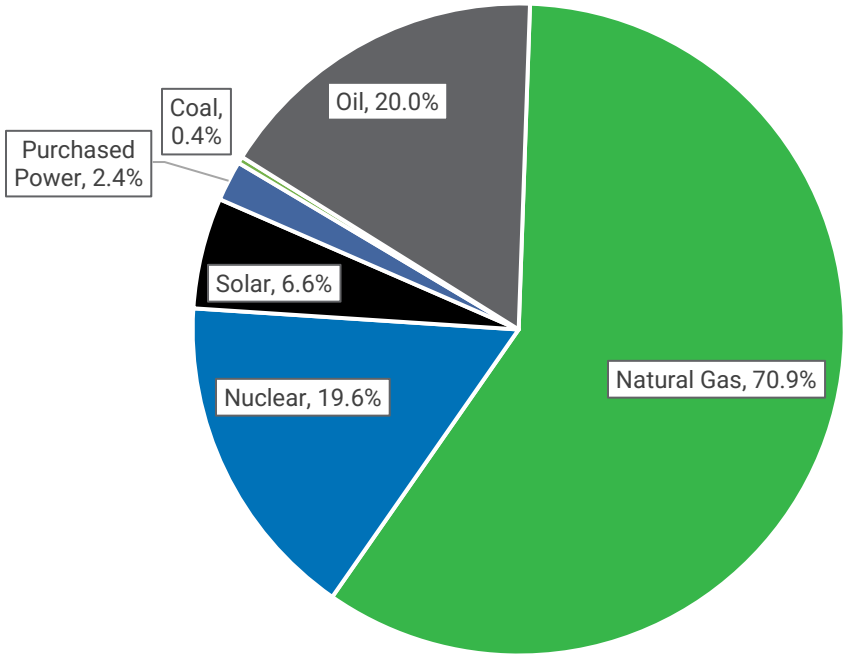
In general, hybrid buses are known for their compromise in emissions and reliability between a diesel and a battery electric bus. Route characteristics and bus configuration may affect the performance of a hybrid bus, which often leads to lower reliability of the vehicle than their diesel and CNG counterparts. Nonetheless, most data shows that hybrids are much more fuel efficient than their diesel counterparts.

[1] Costs Associated With Compressed Natural Gas Vehicle Fueling Infrastructure, US Department of Energy, https://afdc.energy.gov/files/u/publication/cng_infrastructure_costs.pdf

2.2.1.5 Battery Electric

Battery electric buses are a zero-emission technology powered by electricity from rechargeable batteries, which draw energy from the local electric grid. The environmental impact of battery electric buses depends on the fuel mix used by the local utility provider, in this case, FPL. **Figure 2-4** shows the most recent fuel mix reported by FPL, CAT's local electric utility provider.

FIGURE 2-4: FPL ELECTRIC GENERATION FUEL MIX SOURCES (2024)



Source: Florida Power and Light, Energy News (2024)

Battery electric buses are evolving rapidly with every year bringing new, more efficient models, but the technology is far from mature. Battery electric buses draw concern due to multiple factors:

- Limited mileage range per charge
- Battery production and life cycle
- Lengthy charging times
- Variability in electric consumption affected by factors such as load, terrain, and climate

Buses carry large batteries that can be recharged and switched out as needed. These batteries require investments in charging infrastructure, with three main charging systems available

1. **Stand-alone Chargers:** This is the most widely used charging system. Chargers can be placed either at the depot or on the right of way, where buses can park next to the chargers and plug into the adapter.
2. **Pantograph Chargers:** These chargers require overhead wiring and a pantograph, an extension that transfers electricity from the overhead wiring into the electrical unit on the bus.
3. **Induction Chargers:** These chargers provide electricity to buses via electromagnetic induction where buses park over coils that are placed in the street surface to transfer electricity on board.

Most fleets start with stand-alone chargers, typically charging buses overnight at depots. Pantograph and induction chargers offer in-service boosts at stations with longer dwell times. These chargers may

require facilities in the right of way and are more useful for larger battery electric fleets with high frequencies.



Source: APTA

Two forms of charging exist for buses: long-range charging or fast charging. Long-range charging is typically used overnight to charge vehicles for the following day. A full charge may require up to six hours, and the range may still be inadequate for some operational blocks. Overnight charging provides the cost benefit of lower electric rates, thereby keeping fuel costs down.

Fast charging is generally used in-route to provide a quick recharge of batteries to extend range. To implement fast-charging, in-route facilities require careful coordination to provide enough time to recharge and an understanding that the boost may be minimal compared with energy output. Scheduling for the charging facility is needed to avoid overlap, which can be difficult for low frequency systems using a pulse schedule. Additionally, since fast charging facilities are used in-route, they draw energy during daytime hours when the cost of electricity is typically higher than overnight. Fast charging may also need grid upgrades, as battery electric buses require 480 volts in three phases, while typical commercial supply is 240 volts.

Transitioning to battery electric buses involves considerations for maintenance and repair, with mechanics requiring specialized training. While battery electric buses theoretically need less maintenance due to fewer mechanical parts, practical experience may vary, and agencies often need to expand parts inventory. Moreover, complex repairs that cannot be addressed by local mechanical crews may require that a bus be taken out of service to be repaired by the manufacturer.

As noted under the hybrid section, concerns have been raised about lithium mining needed to produce these batteries.

2.2.1.6 Hydrogen Fuel Cell Electric

Hydrogen FCE buses are zero-emission vehicles that use hydrogen to generate electricity, emitting only water vapor. Despite being the cleanest mobility technology, FCE buses have low market penetration due to high costs and the need for new parts.

Hydrogen FCE buses expose hydrogen to oxygen to create electrical energy that powers the electric motor to propel the bus. While hydrogen is an abundant and renewable natural element, the gas is highly volatile and requires pressurization to be used as a fuel.

Hydrogen propulsion systems are similar to a battery electric bus, while its gas injection and maintenance is very similar to CNG buses. Hydrogen FCEs are in a stage of near maturity, but they remain expensive relative to other technologies.

Fueling options include on-site or off-site hydrogen production, though off-site sources are rare. Moreover, on-site fueling requires a substantial investment in infrastructure to deliver hydrogen. Hydrogen, like CNG, may be provided through trailered cylinders acquired locally. Hydrogen may also be stored in a liquid state. Finally, and more commonly, hydrogen may be created on site, using components similar to CNG such as a compressor, storage units, coolers and dispensers. The increased level of volatility requires more expensive materials, driving up costs significantly.



Source: https://www.act-news.com/

Due to complexity and the low levels of both demand and supply, training for such a fuel alternative is more challenging than with other fuel alternatives. Moreover, manufacturers of hydrogen equipment possess a stronghold over maintenance and repairs, meaning that specialized crews provided by manufacturers are required to perform maintenance, leading to increased lifespan costs and operational inefficiencies. Still, hydrogen FCE buses have fewer mechanical parts than diesel engines and offer a longer range than battery-electric buses, making them an appealing alternative.

Overall, nearly $3 to $5 million are required to build or modify facility conditions to adequately allow the use of hydrogen, while also requiring nearly 4,500 square feet of space. The cost of hydrogen equipment continues to drop over time, making it more affordable. The initial investment in hydrogen as an alternative may be expensive, but larger hydrogen fleets reduce the investment per vehicle costs.

2.2.2 Technology Comparison

The following section summarizes the data side-by-side to make comparing fuel technologies easier. **Table 2-2** compares key considerations for the various alternative fuel technologies. Several factors are assessed and correspond to five broad categories of impact:

- **State of Technology:** Evaluates the current state of each alternative fuel technology such as the level of technology maturity, current industry adoption rate, the coordination required with various parties to deliver services using the technology for each bus, etc.
- **Financial Impact:** Considers the impact that each technology may have on agency finances, such as lifecycle costs, vehicle costs, and potential grant funding for each technology.
- **Impact to Facility Spaces:** Assesses the impact that the adoption of each fuel alternative technology may have on existing facility spaces, like whether using the fuel alternative requires facility upgrades or if additional space may be needed for new facilities.
- **Operations and Maintenance Impact:** Considers daily impacts of adoption such as the operational burden on the route network, reliability, and the number of unknown factors that may present themselves over time.
- **Regional Impact:** Considers a technology based on regional factors, such as the successful adoption of a technology in the region or climate and terrain factors.

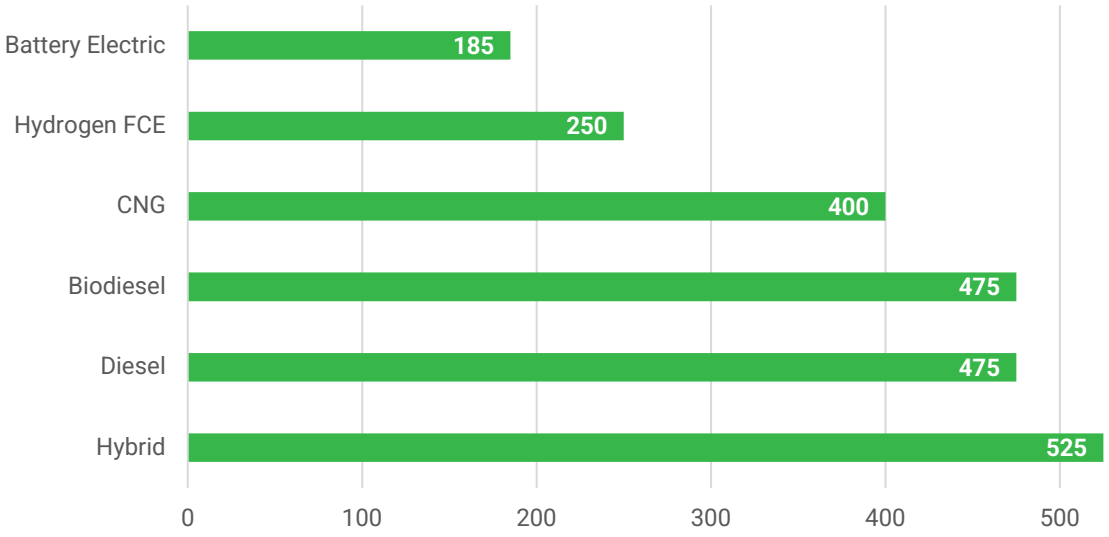
TABLE 2-2: ALTERNATIVE FUEL TECHNOLOGIES COMPARISON

	Diesel	Biodiesel	CNG	Hybrid	Battery Electric	Hydrogen FCE
State of Technology						
Current Adoption Rate	Phasing Out	Stagnant	Steady	Steady	Growing	Growing
Maturity	Mature	Mature	Mature	Evolving	Evolving	Almost Mature
Emission Reduction	None	Low	Low	Low	High	High
Coordination Level	Few	Few	Some	Some	Many	Many
Ease of Adoption	Easy	Easy	Challenging	Easy	Challenging	Challenging
Financial Impact						
Lifecycle Cost	Medium	Medium	Low	Medium	Low	High
Vehicle Cost	Low	Medium	Medium	Medium	High	High
Infrastructure Cost	Low	Low	High	Low	Medium	High
Grant Security	None	Low	High	High	High	Medium
Impact to Facility Spaces						
Added Footprint	None	Low	High	Low	Medium	High
Facility Upgrades	None	Some	Many	None	Many	None
Operations and Maintenance Impact						
O&M Cost	High	High	High	Medium	Low	High
Vehicle Range	Standard	Standard	Standard	High	Low	Standard
Additional Training	None	Low	High	Medium	High	High
Added Inventory	None	Minimal	High	Medium	Medium	High
Reliability	High	Medium	High	Low	Low	Medium
Refueling Time	5 mins	5 mins	5-15 mins	5 mins	4 to 6 hours	7-20 mins
Unknown Factors	None	Few	Few	Some	Many	Many
Regional Impact (Florida)						
Regional Climate and Terrain Impact	None	Low	Low	Low	Medium	Low
Regional Agencies with Technology	Broad	Some	Broad	Broad	Minimal	None

Source: Benesch

Because vehicle range is so important to technology adoption, **Figure 2-5** provides greater detail on the range of each technology. On a full tank, hybrid buses provided the greatest vehicle range, even an improvement over the vehicle range for diesel buses. CNG buses, offering a 400-mile range, perform similarly to diesel. Battery electric buses have a relatively low range, which can present a challenge for systems that operate on longer blocks and routes. Hydrogen FCE has a relatively short range as well. It should be noted that vehicle range is affected by many factors including load, use of auxiliary systems such as heating and cooling, terrain, weather, etc.

FIGURE 2-5 AVERAGE VEHICLE RANGE (MILES)



Sources: HART presentation, "Adopting new Fuel Technologies" (2017); Fairfax County DOT presentation, "Electric Buses Overview" (2020); and Academies of Sciences, Engineering, and Medicine, Guidebook for Deploying Zero-Emission Transit Buses (2020)

MINUTES OF THE PUBLIC TRANSIT ADVISORY COMMITTEE MEETING

NAPLES, FLORIDA

NOVEMBER 20, 2024

LET IT BE REMEMBERED, the Public Transit Advisory Committee in and for the County of Collier, having conducted business herein, met on this date at 1:00 P.M. in REGULAR SESSION at Collier County Museum Lecture Hall, 3331 Tamiami Trail E, Naples, Florida with the following members present:

Chair:	John DiMarco, III
Vice Chair:	Peter Berry
	Cliff Donenfeld
	Dewey Enderle
	Sonja Lee Samek
	Benita Staadecker
	Open Seat

ALSO PRESENT: Brian Wells, Director, Collier County PTNE
Omar DeLeon, Public Transit Manager, Collier County PTNE
Alexander Showalter, Senior Planner, Collier County PTNE
Keyla Castro, Operations Support Specialist, Collier County PTNE
Rosio Garcia, Operations Analyst, Collier County PTNE
Marika Maldonado, Paratransit Manager, Collier County PTNE
Elena-Ortiz Rosado, Marketing Manager, Collier County PTNE
Corene Sanger, Management Analyst, Collier County PTNE
Liz Soriano, Project Manager, Collier County PTNE
Jacob Stauffer, Transit Planner, MV Transportation
Nolan Begley, Fixed Route Manager, MV Transportation

1. **Call to Order**
   Chair DiMarco called the meeting to order at 1:00 P.M.

2. **Roll Call**
   Roll call was taken, and a quorum of four was established.

3. **Approval of Agenda**
   Ms. Staadecker moved to approve the Agenda as presented. Second by Vice Chair Berry. Carried unanimously 4 - 0.

4. **Approval of Minutes**
   Mr. Enderle moved to approve the minutes of the September 18, 2024, Public Transit Advisory Committee meeting. Second by Vice Chair Berry. Carried unanimously 5 - 0.

Ms. Samek and Mr. Donenfeld joined the meeting at 1:04 P.M. A quorum of six was present.

5. **Committee Action**
   a. **Grant Applications for 5310, 5311, and 5339**
      Mr. DeLeon presented the Executive Summary *"Grant Application for 5310, 5311, and 5339"* for the submission of the FY25 Capital/Operating Grants Program applications to the Florida Department of Transportation (FDOT). The Board of County Commissioners (BCC) must approve the grant application submissions. He noted:

      FTA Section 5310 Grant Request
      The 5310 capital and operating grant requests in FY25 supports the Collier Area Transit (CAT) System to purchase replacement vehicles and operating expenses to support the paratransit service.
      - Funding in the amount of $625,766 will be used to purchase four replacement paratransit vehicles and equipment that have met their useful life.
      - Another $800,000 requested will be utilized to provide paratransit services in the urbanized areas. Funding allocated, which requires a 50% local match, would be $400,000 in Federal funds and $400,000 in Local funds.
      - The capital grant includes Federal Funding ($900,613), a State Match of ($62,577) and a Local Match of ($462,577) for a total of $1,425,766.
      - Replacement vehicles will not increase the overall paratransit fleet inventory.
      - The acquisition will provide for ongoing transportation services to the elderly and disabled residents of the County.

      FTA Section 5311 Grant Request
      The 5311 capital grant request in FY24 supports the Collier Area Transit (CAT) System to offset operational costs to support fixed route service in the rural areas.
      - Rural capital grant funding in the amount of $1,444,000 will be used to offset operational costs to support fixed route service in the rural areas.
      - The capital grant includes a 50% Federal Share ($722,000), and a 50% Local Match ($722,000).

FTA Section 5339 Grant Request

The 5339 capital grant request in FY24 supports the Collier Area Transit (CAT) System to purchase a replacement vehicle to support fixed route service and construction of four bus stop improvements in rural areas.

- Funding in the amount of $852,079 will be used to purchase one forty-foot fixed route bus to replace a bus that has met its useful life.
- Additionally, funding in the amount of $284,071 will be used for the purchase and construction of bus stop improvements including shelters.
- The capital grant funding match requirements include an 80% Federal share ($924,481) with a 20% State Match ($231,120) for a total grant funding request of $1,155,602.

Mr. DeLeon noted:

- Grant funds, awarded to FDOT by the Federal Transit Administration (FTA), are utilized annually by the Program.
- Rural area boundaries, determined by PTAC, rely on census data. FDOT recently approved the boundaries.
- Collier County is not in competition with other entities for rural Grants 5311 and 5339.
- "Elderly Eligibility Criteria" would be defined if introduced as a criterion for Grant distribution.

Vice-Chair Berry motioned to endorse the submittal of Grant Applications 5310, 5311 Rural, and 5339 Rural in the amount of $4,025,368.00 to the Board of County Commissioners (BCC) for approval and submission to the Florida Department of Transportation (FDOT). Seconded by Ms. Staadecker. Carried unanimously 6 – 0.

6. Reports and Presentations

a. Seasonal Schedule Change 2024

Mr. Stauffer presented the Executive Summary *"November Route Changes"* updating the Committee on the service modifications to be implemented for the season schedule change on November 17, 2024. He noted:

- Changes will be implemented across multiple Collier Area Transit routes.
- Public notification in advance of the changes included distribution of the proposed schedule modifications throughout the community and postings on social media and RideCAT.com.
- Many changes are driven by an effort to improve the On-Time Performance of CAT's fixed route service.
- Data collected over the past two years includes "run times" and driver feedback, resulting in adjustment to the timepoints to provide riders a more accurate estimation of bus arrival at the stops.
- Significant route changes related to Route 19 and Route 22.
- Route 22 had its morning outbound trip from the Government Center to Immokalee, as well as the evening inbound trip from Immokalee to CAT Ops, removed.
- The Route 19 Express will be out of service on the way to Immokalee to service the Route 22 segment before starting service as Route 19.
- Changes will be available for public review online and on social media.

Mr. Stauffer noted:
Facebook Survey

- Statistical data will be reported when available.

Paratransit Bus Schedule
A member reported wait time experienced for passenger pick-up was occasionally unreasonable and efforts to contact dispatch were unsuccessful.

Mr. Stauffer noted:

- Eligibility requirements must be met to book special trips.
- A "window time and" is provided to the passenger for pick up as is ride time.
- Dispatch should be notified if the passenger is ready ahead of the scheduled pick up. accommodation will be made if possible.
- The dispatch number (239.262.7272) offers a recorded option menu.

Mr. Stauffer *will investigate the functionality of the dispatch number and provide an update at the December 18, 2024 meeting.*

7. **Member and Staff Comments**
Marco Island Trolley Pilot Program
Mr. Showalter reported:
    - Two new members were elected to the Marco Island City Council.
    - The Council members voted against the trolley route pilot program to the island.
    - The program, scheduled to commence in January 2025, was designed to reduce traffic congestion on the island.

8. **Public Comments**
None

9. **Next Meeting Date** December 18, 2024 - 1:00 P.M.
Collier County Museum Lecture Hall
3331 Tamiami Trail E
Naples, FL. 34104

10. **Adjournment**
There being no further business for the good of the County, the meeting was adjourned by the chair at 1:30 P.M.

Public Transit Advisory Committee

_____
John DiMarco III, Chair

These minutes approved by the Board/Committee on January 15, 2025 as presented X or as amended _____.

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierGov
facebook.com/CollierGov
youtube.com/CollierGov

March 14, 2025

FOR IMMEDIATE RELEASE

Notice of Hybrid Remote Public Meeting
Public Transit Advisory Committee (PTAC)
Collier County, Florida

March 19, 2025
1:00 p.m.

Notice is hereby given that the **Public Transit Advisory Committee (PTAC)** will meet on **Wednesday, March 19,** at **1:00 p.m**. This will be a Hybrid Remote meeting and it will be held at the Collier County Museum, Lecture Hall, 3331 Tamiami Trail East, Naples, Florida. The public may attend either remotely or in person.

Individuals who would like to participate remotely should contact Alexander Showalter at Alexander.Showalter@colliercountyfl.gov or call (239) 252-5849 by **noon on March 19**.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

The agenda will be available on the Collier County Government website at https://www.ridecat.com/inside-cat/ptac/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Alexander Showalter at (239) 252-5849.

Public Transit Advisory Committee
Collier Area Transit
Hybrid Meeting
Collier County Museum Lecture Hall
3331 Tamiami Trail East Naples, Florida
March 19th, 2025
1:00 p.m.

Agenda Packet

1) Call to Order
2) Roll Call
3) Approval of Agenda
4) Approval of Minutes
    a. January 15, 2025
5) Committee Action
    a. Zero Emissions Vehicle Transition Plan
6) Reports and Presentations
    a. Paradise Beach Trolley
    b. Major TDP Update
7) Member Comments
8) Public Comments
9) Next Meeting Date – April 16th, 2025, Collier County Museum Lecture Hall
10) Adjournment

Two or more members of the Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future BCC meeting.

Collier Area Transit operates in compliance with Federal Transit Administration, (FTA) program requirements and ensures that transit services are made available and equitably distributed and provides equal access and mobility to any person without regard to race, color, or national origin, disability, gender or age. Title VI of the *Civil Rights Act of 1964*; FTA Circular 4702.1A, "Title VI and Title VI Dependent Guidelines for Federal Transit Administration Recipients.

Anyone who required an auxiliary aid or service for effective communication, or other reasonable accommodations in order to participate in this proceeding, should contact the Collier County Facilities Management Department located at 3335 Tamiami Trail East, Naples, Florida 34112 or 239-252-8380 as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

MINUTES OF THE PUBLIC TRANSIT ADVISORY COMMITTEE MEETING

NAPLES, FLORIDA

JANUARY 15, 2024

LET IT BE REMEMBERED, the Public Transit Advisory Committee in and for the County of Collier, having conducted business herein, met on this date at 1:00 P.M. in REGULAR SESSION at Collier County Museum Lecture Hall, 3331 Tamiami Trail E, Naples, Florida with the following members present:

Chair:	John DiMarco, III
Vice Chair:	Peter Berry
	Cliff Donenfeld
	Dewey Enderle (Excused)
	Sonja Lee Samek
	Benita Staadecker
	Open Seat

ALSO PRESENT: Brian Wells, Director, Collier County PTNE
Omar DeLeon, Public Transit Manager, Collier County PTNE
Alexander Showalter, Senior Planner, Collier County PTNE
Keyla Castro, Operations Support Specialist, Collier County PTNE
Elena Ortiz-Rosado, Events, Sales and Marketing Coordinator, PTNE
Jacob Stauffer, Transit Planner, MV Transportation

1. **Call to Order**
   Chair DiMarco called the meeting to order at 1:00 P.M.

2. **Roll Call**
   Roll call was taken, and a quorum of four was established.

3. **Approval of Agenda**
   Ms. Staadecker moved to approve the Agenda as presented. Second by Vice Chair Berry. Carried unanimously 4 - 0.

4. **Approval of Minutes**
   Ms. Staadecker moved to approve the minutes of the November 20, 2024, Public Transit Advisory Committee meeting as presented. Second by Vice Chair Berry. Carried unanimously 4 - 0.

Ms. Samek joined the meeting at 1:04 P.M. A quorum of five was present.

5. **Committee Action**
   None

6. **Reports and Presentations**
   a. **Update on Transit Development Plan (TDP) Process**
   Mr. Showalter presented the Executive Summary "*Update on Transit Development Plan (TDP) Process"* to the Committee. He noted:
   - The TDP process identifies recommendations and implementation strategies to achieve the goals and objectives of Collier Area Transit.
   - To receive State Block Grant Funds for system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five (5) years.
   - The TDP is a ten (10) year plan for transit needs, cost and revenue projections, community transit goals, objectives, and policies.
   - The TDP serves as a planning, development and operational, guidance document.
   - TDP Components include:
     - Mission, Goals, and Objectives – Overall purpose, specific, achievable targets, and actions to reach the goals.
     - Situational Appraisal – Identifying and addressing concerns.
     - Recommended Network Changes – Service Improvements and New Service.
     - Financial Element – Alternative funding sources required to implement initiatives.
     - Public Outreach – Public Surveys and Workshops, and Stakeholder interviews.
   - The major update is developed in coordination with the Metropolitan Planning Organization's (MPO) long range transportation plan.
   - Collier Area Transit staff have been working with the Consulting Team of Stantec and MPO Staff to update the plan.
   - The consultant has produced the Public Involvement Plan, consistent updates to each section of the TDP and identified new peers for comparison of transit systems.
   - MPO and CAT Staff's feedback and comments have been incorporated into the documents.

Approval Process Key Dates 2025

- March 1 - Complete TDP Draft
- March 1 - 30 Day Public Comment Period
- June 1 - Final Proposed TDP
- June 13 - Submission to MPO Board
- June/July - Submission to the Collier Board of County Commissioners

Comments

Mr. Showalter responded to queries:

- Venues to inform the public about proposed system changes include the County website, the County Commissioner newsletter, and Public Workshops. Additional Social Media venues will be researched.
- Suggested roadway network improvements such as integration of HOV lanes and lane restriction access for commercial trucks will be submitted to the MPO for evaluation.
- A light rail system (LRT) has not been considered for County transportation.

If members of the Committee have any comments or questions on the update they should contact Mr. Showalter.

b. Zero Emissions Plan Update

Mr. Showalter presented the Executive Summary "*Zero Transmission Plan Update"* to the Committee. He noted:

- CAT Staff, the MP0, and consulting firm Benesch have initiated the process to develop a Zero-Emissions Transition Plan.
- The Plan is a strategic initiative by CAT to transition the existing fleet of diesel busses, into a mixed fleet including zero or low-emissions alternatives.
- The plan is critical to grant applications related to zero or low-emissions purchases.
- The Plan will assess the financial, operational, and infrastructural changes required to adopt zero or low-emission technologies into CAT's fleet.
- The goal is to provide a path forward to include these vehicles into CAT's everyday fleet in a cost-effective and operationally efficient manner.

7. Member and Staff Comments

Member Information

- Committee Members data should be updated on the County website by March 31, 2025.

Marco Island Parking

- The Marco Island City Council voted to ban vehicle parking in the swales.

Traffic Congestion

- FDOT has identified projects for 2026 to eliminate congestion.

Collier Boulevard Widening Phase III

- The project is along Collier Boulevard between City Gate Boulevard North and Green Boulevard and involves widening Collier Boulevard from four to six lanes within the project limits. It includes realigning portions of the adjacent CR 951 Canal. The project is anticipated to complete design by mid-2025.
- The bus stop will be moved one block south and a traffic light will be added.

8. Public Comments
None

9. Next Meeting Date February 19, 2025 - 1:00 P.M.
Collier County Museum Lecture Hall
3331 Tamiami Trail E
Naples, FL. 34104

10. Adjournment
There being no further business for the good of the County, the meeting was adjourned by the chair at 1:33 P.M.

Public Transit Advisory Committee

_____
John DiMarco III, Chair

These minutes approved by the Board/Committee on _____,2025 as presented_____ or as amended _____.

EXECUTIVE SUMMARY
Reports and Presentations
Item 5a
Draft Zero Emissions Vehicle Transition Plan

Objective:
To present and gain committee's approval of the Draft Zero Emissions Vehicle Transition Plan completed by Benesch, CAT, and the Collier MPO.

Considerations:
Collier Area Transit (CAT) and the Collier Metropolitan Planning Organization (MPO) brought on the consultants of Benesch to complete a Zero Emissions Vehicle Transition Plan to evaluate the implementation of battery electric and other alternative fueled vehicles into the CAT fleet. This study was completed as a prerequisite to apply for federal grant funding related to alternative fueled vehicles. This plan proposes a 3-phase implementation aligning with the purchase of our latest electric bus and evaluating the usefulness of the technology for CAT's future fleet.

This draft is being presented today by the Benesch team and will be discussed with PTAC to solicit any comment or feedback.

Recommendation:
Approval of the Zero Emissions Vehicle Transition Plan

Attachment:
Draft Zero Emissions Vehicle Transition Plan

Prepared by: _____ **Date:** 3/13/25
Alexander Showalter, Planner II

Approved by: _____ **Date:** 3/13/25
Omar DeLeon, Transit Manager



Zero Emission Vehicle Transition Plan

DRAFT for Review 3/7/2025

TABLE OF CONTENTS

1 INTRODUCTION 1-1

2 STATE OF ZERO EMISSION VEHICLES 2-1

2.1 Recent Trends in Alternative Fuel Technologies 2-1

2.2 Alternative Fuel Technology Profiles 2-4

3 PEER EXPERIENCE 3-1

3.1 Peer Review 3-1

3.2 Summary of Peer Interviews 3-2

3.3 National Case Studies 3-3

3.4 Key Takeaways for CAT 3-5

4 LOCAL, REGIONAL, AND STATE INITIATIVES 4-6

4.1 Federal Transit Administration Low or No Emission Grant Program 4-6

4.2 Florida's Energy & Climate Change Action Plan (2008) 4-7

4.3 Florida Electric Vehicle Roadmap Executive Report (2020) 4-7

4.4 FDOT EV Infrastructure Master Plan (2021) 4-7

4.5 CAT Transit Development Plan Major Update (2020) and Annual Progress Report (2024) 4-8

4.6 Collier County Comprehensive Plan (2023) 4-8

4.7 City of Naples Critical Assets and Facilities Adaptation Plan (2024) 4-9

4.8 LeeTran FTA Bus Low- and No-Emission Grant Award (2022) 4-9

5 UTILITY PROVIDER COORDINATION 5-1

5.1 FPL EVolution 5-1

5.2 Facility Analysis 5-1

6 ALTERNATIVE FUEL FEASIBILITY 6-1

6.1 Baseline Data 6-1

6.2 Feasibility Analysis Assumptions 6-14

6.3 Model Results 6-20
6.4 Fuel Mix Recommendations 6-27
7 FINANCIAL ANALYSIS 7-1
7.1 Financial Plan 7-1
7.2 Potential Additional Funding 7-10
8 IMPLEMENTATION PLAN 8-1
8.1 Vehicle Replacement Plan 8-1
8.2 Fuel Mix 8-2
8.3 Phasing of Implementation 8-3
8.4 Paratransit and Support Vehicle Fleet Plan 8-6
8.5 Financial Plan 8-6
8.6 Emissions Reduction 8-10
8.7 Facilities Recommendations 8-12
8.8 Workforce Training Considerations 8-12
8.9 Monitoring and Evaluation Strategy 8-13

APPENDIX A STEERING COMMITTEE MEETING SUMMARIES
APPENDIX B PEER AGENCY INTERVIEW NOTES
APPENDIX C FEASIBILITY ANALYSIS RESULTS
APPENDIX D FEASIBILITY ANALYSIS RESULTS (686 KWH BATTERY)
APPENDIX E POTENTIAL ADDITONAL FUNDING PROGRAMS
APPENDIX F VEHICLE REPLACEMENT PLAN

LIST OF MAPS

Map 6-1: CAT Routes 6-5
Map 6-2: Routes with Layovers at CAT's Operations Center 6-12
Map 6-3: Routes with Layovers at the Government Center Intermodal Transfer Facility 6-13
Map 6-4: Routes with Layovers at the Immokalee Transfer Facility 6-13

LIST OF TABLES

Table 2-1 Categorization of Major Alternative Fuel Technologies 2-1
Table 2-2: Alternative Fuel Technologies Comparison 2-10
Table 3-1: Selection of Peers for Review 3-1
Table 6-1: CAT Fleet Summary 6-1
Table 6-2: Fixed Route Fleet By Fuel Type and Vehicle Length 6-2
Table 6-3: Fixed Route Fleet By Fuel Type and Purchase Year 6-2
Table 6-4: Estimated Fixed Route Vehicle Replacement Schedule 6-3
Table 6-5: Demand Response Fleet by Fuel Type and Vehicle Length 6-3
Table 6-6: Demand Response Fleet by Fuel Type and Purchase Year 6-4
Table 6-7: Estimated Demand Response Vehicle Replacement Schedule 6-4
Table 6-8: CAT Route Profiles 6-6
Table 6-9: Fixed Route Service Blocks by Day of Week and Vehicle Length 6-7
Table 6-10: Fixed Route Service Block Profiles 6-9
Table 6-11: Descriptive Data from November 2024 Observed Runs 6-10
Table 6-12: Mileage Assumptions Used for Each Vehicle 6-11
Table 6-13: CAT Depot and Transfer Facility Locations 6-12
Table 6-14: Nominal and Strenuous Assumptions for Battery Electric Buses 6-15
Table 6-15: Battery Life and Degradation Assumptions 6-15
Table 6-16: Battery Capacity Improvement Assumptions 6-17
Table 6-17: Summary of Alternative Fuel Vehicle Range Assumptions 6-19
Table 6-18: Other Feasibility Considerations Made During Feasibility Assessment 6-19
Table 6-19: Support Vehicle Current Inventory and Their EV Equivalent 6-19
Table 6-20: Service Range Assumptions Used for Each Vehicle Group 6-20
Table 6-21: Currently Feasible Blocks By Operation Day 6-21
Table 6-22: Future Feasible Blocks by Operation Day for Purchase Years 2025 and 2035 6-21
Table 6-23: Charging Options and Time to Full Charge 6-22
Table 6-24: Feasible Blocks by Fuel Type and Day of Operation 6-24
Table 6-25: Percentage of DR Trips Served Feasibly by Alternative Fuel Cutaways 6-26
Table 6-26: Feasibility of EVs to Serve the Maximum Daily Mileage of Support Vehicles 6-26
Table 6-27: Fixed Route Fuel Mix Recommendations 6-28
Table 6-28: Demand Response Fuel Mix Recommendations 6-35
Table 6-29: Support Vehicles Fuel Mix Recommendations 6-38
Table 7-1: Summary of Cost Savings by Scenario 7-4
Table 7-2: Assumed Capital Costs of Vehicles by Fuel Type (AFLEET Tool, 2023) 7-5
Table 7-3: Assumed Operating Costs of Vehicles by Fuel Type* 7-6
Table 7-4: Assumed Costs of Alternate Fuel Infrastructure (AFLEET, 2023) 7-6
Table 7-5: Summary of Potential Funding Sources for ZEV's 7-11
Table 8-1: CAT Existing Fixed Route Fleet 8-1

Table 8-2: CAT Fixed Route Vehicle Replacement Plan 8-2

LIST OF FIGURES

Figure 2-1: Bus Vehicle Power Sources 2-2
Figure 2-2: Mix of Alternative Fuels for US Buses (2024) 2-3
Figure 2-3: Mix of Alternative Fuels for Florida Buses (2024) 2-3
Figure 2-4: FPL Electric Generation Fuel Mix Sources (2024) 2-7
Figure 2-5 Average Vehicle Range (miles) 2-11
Figure 5-1: Site Plan for CAT Administrative Building 5-2
Figure 6-1: Distribution of Block Lengths for each Service Day 6-7
Figure 6-2: Distribution of Observed Runs By Trip Lengths 6-10
Figure 6-3: Scenario 1A (No On-Route Charging) 6-29
Figure 6-4: Scenario 1B (On Route Charging) 6-29
Figure 6-5: Scenario 2A (No On-Route Charging) 6-30
Figure 6-6: Scenario 2B (On-Route Charging) 6-30
Figure 6-7: Scenario 3A (No On-Route Charging) 6-30
Figure 6-8: Scenario 3B (On-Route Charging) 6-30
Figure 6-9: Scenario 4 6-31
Figure 6-10: Fixed Route Estimated Capital Costs 6-32
Figure 6-11: Estimated Annual Emissions Profile for Fixed Route 6-33
Figure 6-12: Well to Wheels Lifecycle Greenhouse Gas Emissions Fixed Route Comparisons 6-34
Figure 6-13: Demand Response Estimated Capital Costs 6-36
Figure 6-14: Estimated Annual Emissions Profile for Demand Response 6-37
Figure 6-15: Well to Wheels Lifecycle Greenhouse Gas Emissions Demand Response Comparisons 6-37
Figure 6-16: Support Vehicles Estimated Capital Costs 6-38
Figure 6-17: Estimated Annual Emissions Profile for Support Vehicles 6-39
Figure 6-18: Well to Wheels Lifecycle Greenhouse Gas Emissions Support Vehicle Comparisons 6-39
Figure 7-1: Total Capital Costs by Fuel Mix Scenario (2025-2034) 7-2
Figure 7-2: Total Operating Costs by Fuel Mix Scenario (2025-2034) 7-2
Figure 7-3: Total Capital and Operating Costs by Fuel Mix Scenario (2025-2034) 7-3
Figure 7-4: CAT Operations Cost Feasible Plan (2025-2034) 7-8
Figure 7-5: CAT Capital Cost Feasible Plan (2025-2034) 7-9
Figure 8-1: 2025 Fuel Mix 8-2
Figure 8-2: 2034 Fuel Mix 8-2
Figure 8-3: Proposed Fixed Route Fleet Composition 8-4
Figure 8-4: Proposed Fixed Route Vehicle Purchase Plan 8-5
Figure 8-5: Proposed Fixed Route Vehicle Expenses 8-5
Figure 8-6: CAT Operations Cost Feasible Plan (2025-2034) 8-7

Figure 8-7: CAT Capital Cost Feasible Plan (2025-2034) 8-8
Figure 8-8: Proposed CAT Financial Plan 8-9
Figure 8-9: CAT ZEV 2025-2034 Transition Plan Total Fixed Route Vehicle Capital and Operating Expenses 8-9
Figure 8-10: Annual Emissions Profile Comparison for the Final Recommendation of Fixed Route Vehicles 8-10
Figure 8-11: Well To Wheels Lifecycle Greenhous Gas Comparison for the Final Recommendation of Fixed Route Vehicles 8-10
Figure 8-12: Annual Emissions Profile Comparison for the Final Recommendation of Support Vehicles . 8-11
Figure 8-13: Well To Wheels Lifecycle Greenhous Gas Comparison for the Final Recommendation of Support Vehicles 8-11

1 INTRODUCTION

The transit industry is shifting from traditional diesel vehicles to various alternative fuel technologies due to a combination of increasing environmental awareness, availability and advancement of alternative fuel technologies, fleet diversification and flexibility, efficiency, and federal incentives (i.e., grant funding). Collier Area Transit, operating as CAT, is exploring options related to incorporating alternative fuel vehicles in its fleet. CAT provides fixed route services over 16 routes and paratransit demand response services through CATConnect for eligible individuals. CAT manages a fleet of 30 fixed route buses, 33 paratransit vehicles, and 6 support vehicles, a total of 69 vehicles.

In 2021, the Federal Transit Administration (FTA) announced that no-emission projects seeking funding under the Grants for Buses and Bus Facilities Competitive Program (49 U.S.C. § 5339(b)) and the Low- or No-Emission Program (49 U.S.C. § 5339(c)) must have a Zero-Emission Transition Plan (ZETP). This report substantially meets this requirement in support of future FTA grant funding requests made by Collier County.

A ZETP must meet the following six requirements:

- Element 1 | Demonstrate a long-term fleet management plan with a strategy for how the applicant intends to use the current request for resources and future acquisitions.
- Element 2 | Address the availability of current and future resources to meet costs for the transition and implementation.
- Element 3 | Consider policy and legislation impacting relevant technologies.
- Element 4 | Include an evaluation of existing and future facilities and their relationship to the technology transition.
- Element 5 | Describe the partnership of the applicant with the utility or alternative fuel provider.
- Element 6 | Examine the impact of the transition on the applicant's current workforce by identifying skill gaps, training needs, and retraining needs of the existing workers of the applicant to operate and maintain zero-emission vehicles and related infrastructure and avoid displacement of the existing workforce.

The purpose of this report is to develop a ZETP based on a selection of alternative fuel technologies identified in the following chapters and to meet the requirements of the FTA for competitive grants through the Low- or No-Emission Grant program. While the study evaluates the transition of the fleet, it is imperative to consider the value of diversifying the fleet. The community is dependent on public transit to support transportation needs during natural disasters, for this reason CAT has determined that a balanced mix of technologies will be the goal of its transition plan, the details of which are documented in this ZETP. This balanced approach takes the transition to low-emission or zero-emission vehicles with thoughtfulness, remaining mindful of local climate challenges. The agency finds it appropriate that a portion of its fleet remains composed of diesel vehicles, as these vehicles would be critical to support mobility during power outages, especially after natural disasters such as hurricanes, which are common in the region.

Development of the ZETP included a review of current transit fleet and analysis of recommended scenarios for determining the feasibility of a fleet transition. To ensure the decisions made during this

process consider multiple aspects of the implementation, a Steering Committee was formed from representatives of multiple County agencies and departments. The feedback, guidance and input from the Steering Committee aided in developing the implementation plan for including lower emission fuel considerations for CAT. Brief summaries of the meetings held with the Steering Committee are included as **Appendix A**.

The remainder of this report is divided into seven sections intended to meet the six ZETP elements listed previously:

Section 2: State of Zero Emission Vehicles: A review of recent trends and adoption of fuel sources by transit agencies nationwide was conducted. A comparison and evaluation of multiple fuel sources along an Assessment of potential environmental and fiscal impacts is also included.

Section 3: Peer Experience: Interviews were held with three transit agencies in Florida to better understand their experiences with alternative fuel sources and potential takeaways that can guide CAT's Transition Plan. A review of national case study examples is also included to provide a broader context of transit agency experiences.

Section 4: Local, Regional, and State Initiatives: A summary of key national policy guidance for funding and implementation of low/no emission fuels is included along with key takeaways from Florida DOT studies and action plans for addressing vehicle emissions. Finally, guiding principles and policy guidance included in local planning documents are included.

Section 5 Utility Provider Coordination: Contacts were made with Florida Power and Light and Lee County Electric Cooperative were made to identify potential opportunities for fleet conversion to electric was conducted. A brief summary of potential programs and future coordination actions associated with the Transition Plan are brought forward.

Section 6 Alternative Feasibility Analysis: A review of the current vehicle fleet, including fixed-route, demand response and support vehicles was conducted. Several scenarios were developed and summarized to identify the potential capital and operating costs, and emissions profiles for each scenario was prepared.

Section 7 Financial Analysis: High-level capital cost estimates for the recommended fleet conversion, recommended charging infrastructure, and maintenance/storage facility modifications were completed. In addition, this section provides a review of state and federal funding sources, including FTA's Low or No Emission Grants and the Environmental Protection Agency's (EPA) Community Change Grant Program. Impacts to certain funding sources remain uncertain based on recent federal actions. Availability of funding opportunities should be continually monitored by Collier County.

Section 8: Implementation Plan: A 10-year capital plan was developed to support the recommended strategy for transitioning to a lower emission fleet. The implementation plan balances operational feasibility, financial sustainability, and environmental impact. This section outlines the key steps, timelines, and strategies for fleet conversion, infrastructure development, workforce training, and future decision points for monitoring and adjusting the transition plan based on changes in the state of practice and alternative fuel sources.

2 STATE OF ZERO EMISSION VEHICLES

The State of Zero Emission Vehicles (ZEVs) chapter explores various technology options to determine which technology or technologies are most appropriate for the agency to consider moving forward. This chapter documents the benefits and drawbacks of popular alternative fuel technologies and how they compare to diesel vehicles.

2.1 Recent Trends in Alternative Fuel Technologies

There are two broad categories of alternative fuel technologies: low-emission and zero-emission. Low-emission technologies refer to any alternative technology or alternative fuel that emit lower amounts of harmful tailpipe emissions than diesel. Zero-emission (also known as no-emission) technologies do not rely on fossil fuels for operation and have zero (or nearly zero) harmful tailpipe emissions. Generally, these designations only account for the emissions produced during the usable lifecycle of vehicles and not the emissions produced during the production, disposal of the vehicles, or the production of the fuel source. **Table 2-1** lists the selection of alternative fuel technologies discussed in this report by their respective emission category.

TABLE 2-1 CATEGORIZATION OF MAJOR ALTERNATIVE FUEL TECHNOLOGIES

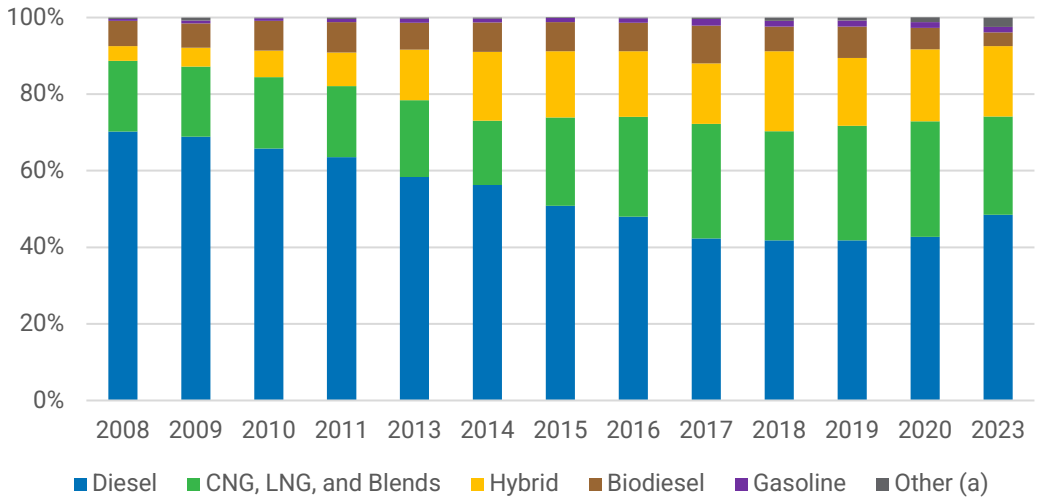
Low-Emission Technologies	Zero-Emission Technologies
• Biodiesel • Compressed natural gas (CNG) • Diesel and battery electric (hybrid) • Gasoline • Liquified natural gas (LNG) • Propane	• Battery electric • Hydrogen fuel cell electric (FCE)

Note: While the term "hybrid technology" can refer to a myriad of combinations of fuels, for the purposes of this report, hybrid refers solely to a combination of diesel and battery electric technologies.

There are multiple fuel alternatives to diesel, and each has evolved at a different pace. The American Public Transportation Association (APTA) maintains a database of more than 450 transit agencies across the United States. The database has helped track various trends in public transportation including fleet fuel mix. **Figure 2-1** shows the changes in fuel mix for buses (excluding commuter bus) between 2008 and 2023. It should be noted that transit agencies voluntarily provide data to APTA and may not update it every year; therefore, data is only as accurate as the agencies reporting.

On average, diesel buses dropped by 1.5 percent annually between 2008 and 2023, beginning with a market share of 70 percent to a current share of 49 percent. The largest diesel decrease occurred between 2011 and 2018. Biodiesel adoption has wavered, with popularity in the past decade peaking at 9.9 percent in 2017 compared to the most recent figure of 3.6 percent.

FIGURE 2-1: BUS VEHICLE POWER SOURCES



Source: APTA Public Transportation Vehicle Database Appendix A (2023)
(a) Includes battery-electric, hydrogen, and propane powered buses
Note: Data for 2012 is not available.

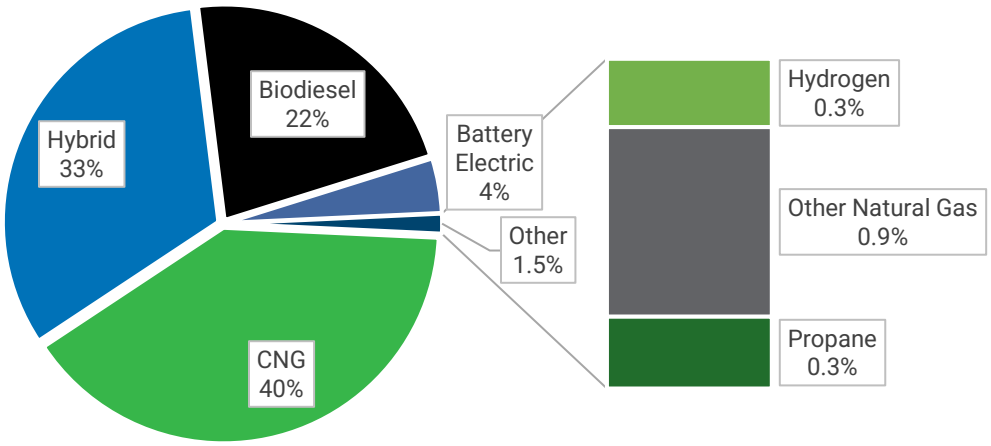
The first alternative fuel technology to gain prominence among transit fleets was compressed natural gas, which increased from 3 percent of transit vehicles to 13 percent between 1996 and 2005. A greater increase in CNG vehicles can be observed between 2015 and 2019, growing about 7 percent annually to an overall 30 percent share in fuel mix, making it the most employed alternative fuel on the market.

Hybrid vehicles (i.e., diesel and battery electric) have had a slow market penetration, with the first models introduced in the late 1990s. However, hybrid vehicles quickly gained traction between 2008 and 2014, growing from an overall fuel mix share of 3.8 percent to 17.9 percent. In 2023, the overall fuel mix share of hybrid vehicles was 18.3 percent.

Other alternative fuel technologies have made marginal market penetration, only recently surpassing 2% of overall fuel mix in 2023. The other alternatives category includes battery-electric, hydrogen, and propane. Propane as a fuel alternative is often used for smaller buses while gasoline is relatively unpopular due to its fuel compression properties and its lack of emission benefits over diesel. The adoption rates of these and other fuel alternative technologies have been impacted either by their level of maturity, cost, or reliability.

Figure 2-2 shows the current share that each alternative fuel technology has achieved among bus fleets in the U.S. in 2024. The most popular alternative fuel technology is CNG. Approximately 40 percent of the alternative fuel fleet is composed of CNG buses, followed by hybrid buses at 33 percent. Zero-emission buses make up close to 4 percent of all bus fleets, with 3 percent battery electric buses and less than 1 percent being hydrogen buses. Around 22 percent of buses use biodiesel and a combined 1.5 percent use some other fuel alternative such as propane, hydrogen, or another natural gas combination.

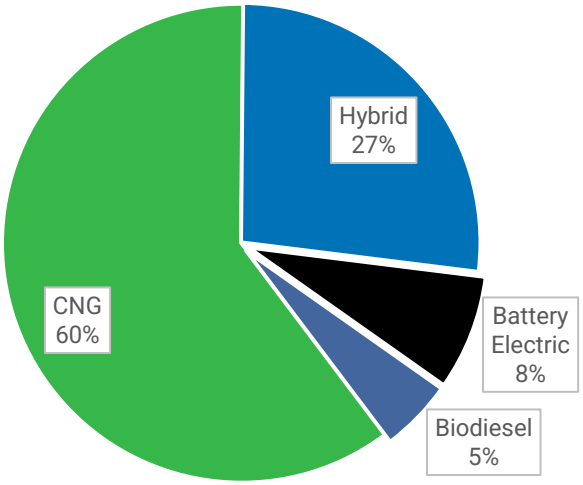
FIGURE 2-2: MIX OF ALTERNATIVE FUELS FOR US BUSES (2024)



Source: APTA Public Transportation Vehicle Database (2024)
Other Natural Gas includes compressed natural gas & diesel, compressed natural gas & gasoline, liquified natural gas propane & diesel, propane & gasoline, propane & compressed natural gas, liquified natural gas & diesel

Similar to the national trend, transit agencies in Florida are increasing their adoption of alternative fuel technologies. **Figure 2-3** shows the alternative fuel mix across buses in Florida in 2024. Among the various fuel alternative fuel technologies, CNG buses are the most common, followed by hybrid buses and battery electric buses.

FIGURE 2-3: MIX OF ALTERNATIVE FUELS FOR FLORIDA BUSES (2024)



Source: APTA Public Transportation Vehicle Database (2024)

The continued transition away from diesel fuel is expected to accelerate in the coming decade due to state and federal initiatives incentivizing conversion. Nonetheless, an uptick in diesel bus fleet share is observed between 2017 and 2023. The reversal of this trend away from diesel in recent years is due to a combination of factors, including agencies not renewing certain alternative fuel vehicles after pilot programs, and supply chain and manufacturing delays experienced during the COVID-19 pandemic, which may have required extended diesel vehicle usage until this issue was corrected. This all indicates

that zero-emission fuels remain challenging to adopt, although their current fuel mix share continues to grow slowly. It is expected that these technologies will gain greater traction in the coming decades as their respective technologies mature.

Due to their low adoption rates, lack of readily available data and/or relatively small reductions in emissions, gasoline, propane, and LNG will not be explored further in this report. **Section 2.2** provides greater detail on five alternative fuel technologies: hybrid diesel-electric, CNG, biodiesel, battery electric and hydrogen FCE. Hybrid, CNG and biodiesel fuel technologies are widely used by transit agencies in Florida. Battery electric and hydrogen FCE vehicles have not been adopted very broadly; however, they are projected to become more popular and are becoming more affordable.

2.2 Alternative Fuel Technology Profiles

This section provides detailed profiles for each fuel type. Profiles include data related to the current state of the technology, a basic understanding of the fuel type, performance and reliability, and an evaluation of their impact on infrastructure and operations. Diesel is included below for comparison purposes. The various fuel alternative technologies are presented by category, starting with the low-emission category, and ending with the zero-emission category.

2.2.1 Technology Profiles

2.2.1.1 Diesel

Diesel engines have been used for propulsion since the early 20th century. The maturity and reliability of this fuel has made it the primary choice for bus fleet propulsion over the last century. Fuel consumption increased in the later 20th century as modern features were introduced in bus models such as air conditioning, heating, wheelchair lifts and other features that required more engine horsepower. In recent decades, federal regulations and technological advancements have reduced the impact of the fuel's emissions. Current improvements in diesel technology are focused on increased fuel efficiency and a reduction in emissions.

The latest changes in U.S. diesel engine standards occurred between 2007 and 2010, when the Environmental Protection Agency (EPA) aimed for the reduction of diesel emissions in a twofold approach. First, it required the reduction of sulfur content in diesel fuel by 97 percent. Second, it required vehicle exhaust emission controls like particulate filters and exhaust recirculation that reduce nitrogen oxide (NOx) and particulate matter (PM) emissions. The latter approach required improvements in engine design, leading to higher vehicle costs, and added parts for bus repair.

In March 2022, the EPA proposed rules to further reduce air pollution by lowering the emissions of NOx and PM from diesel engines to be introduced in diesel vehicles by model year 2027. Finally, the EPA suggests that for diesel vehicles in 2027, useful life periods and mileages be extended to reflect real-world usage, to extend the emissions durability requirement for heavy-duty engines and to ensure certified emission performance is maintained throughout more of an engine's operational life. These measures will likely impact bus operators by lengthening vehicle life



Breeze Diesel Fueling Station
Source: Benesch

spans, challenging current replacement schedules, increasing maintenance periods, and raising costs due to additional parts for emission control maintenance.

2.2.1.2 Biodiesel

Biodiesel, not to be confused with renewable or green diesel, is a low-emission diesel alternative produced through transesterification, where biodegradable elements such as feedstock or restaurant grease react to alcohol in the presence of a catalyst such as lye. The resulting biodiesel is referred to as B100, an acronym that indicates the percentage of biodiesel present. Pure B100 usage is uncommon; usually, biodiesel is blended with regular diesel to reduce the diesel content in favor of a more biodegradable alternative. Popular biodiesel blends currently available include five percent, 10 percent, and 20 percent forms known as B05, B10, and B20.



Source: National Renewable Energy Laboratory. www.nrel.gov

B20 is the more broadly available and used blend today; higher grades are expected to become more common. Biodiesel functions similarly to diesel in compression-ignition engines. While current diesel buses can use certain biodiesel blends, higher blends may require engine upgrades, as pure biodiesel can degrade rubber parts, affecting hoses and gaskets, and causing potential leaks. Biodiesel's lower oxidative stability can also lead to degradation with metals like copper, lead, tin, or zinc, creating sediment that may clog filters.

A cetane number (CN) is assigned to diesel and biodiesel fuels as a measure for identifying fuel ignition delay and related engine performance. Biodiesel fuels generally have a higher CN value than diesel and are considered a lower performing alternative which produces less energy. Biodiesel contains about 8 percent less energy per gallon than diesel. Nonetheless, fuel emissions are notably lower when using biodiesel blends and engines using them are notably cleaner because of a reduced amount of particulate matter compared to diesel.

In freezing temperatures, biodiesel may congeal due to grease-based components, however this is not a concern in Florida's subtropical climate.

Biodiesel blends below B20 are widely available and distributed and require no new infrastructure. The main considerations for any biodiesel fuel blend include specifying which biodiesel feedstock to use given the identified performance and maintenance concerns.

2.2.1.3 Compressed Natural Gas

CNG buses use natural gas as a low-emission fuel for internal combustion, similar to diesel buses but with key differences in fuel type. First, because natural gas is in a gaseous state, it must be compressed for optimal use. CNG is considered one the most mature and well-established fuels available to transit agencies, but its gaseous state has limitations.

CNG contains less energy than diesel, and its high-pressure cylinders connect to the engine via a fuel line with multiple valves and regulators. CNG engines require different mechanical parts than diesel, expanding the parts inventory and requiring specialized staff training.

CNG is considered a low-emission fuel alternative as its main emission is limited to NOx. This fuel alternative is flammable and, because it is an odorless and colorless gas, an additive provides a distinct odor to help detect leaks. Garages supporting CNG vehicles require an extensive evaluation to adhere to guidance from the National Fire Protection Association (NFPA). Additionally, maintenance facilities where CNG is stored or CNG vehicles are repaired require increased ventilation and gas detection systems that can detect and control gas leaks. While CNG may require additional safety infrastructure, issues related to gas leaks are rare.

CNG fueling can occur off site or on site. CNG fueling is a time-consuming process. If a fleet is larger, CNG is ideally produced or pumped on site as it increases operational efficiency. The availability of CNG is contingent upon the local natural gas utility provider. Currently, Collier County may find it challenging to find private CNG fueling but may coordinate with the Florida Power and Light (FPL) subsidiary, FPL Energy Services (FPLES), to assess the availability of natural gas services. Alternatively, private companies such as Trillium or NoPetro are known to create public private partnerships through which transit agencies could benefit from their CNG stations. On-site CNG infrastructure involves substantial investment, including a gas dryer, compressor, and storage system, with costs ranging from $500,000 for a smaller CNG station to $2 million for a larger CNG station[1].

2.2.1.4 Hybrid

Hybrid, specifically diesel-electric hybrid, buses are low-emission vehicles that combine an electric motor with an internal combustion engine. While hybrid buses have an electric component, they operate more like diesel buses than battery-electric buses and don't require external charging, instead using a rechargeable battery alongside traditional mechanical parts.



There are two types of propulsion system configurations in a hybrid bus:

- **Parallel hybrid:** Uses both the electric motor and internal combustion engine, switching between them based on driving conditions. Mostly, the electric motor is used in stop-and-go traffic, while the combustion engine powers the bus at higher speeds, such as on highways.
- **Series hybrid:** Relies solely on the electric motor for propulsion, with power supplied by a battery or a generator driven by an internal combustion engine. This configuration is better suited for stop-and-go conditions.

Concerns have been raised about the impacts related to the mining of lithium, a component required in vehicle batteries. There are two primary concerns: (1) environmental destruction from drilling and mining and (2) water contamination from the refining process. Some environmental advocates contend that the negative impacts created by the mining process may outweigh the environmental benefits achieved by battery powered vehicles.

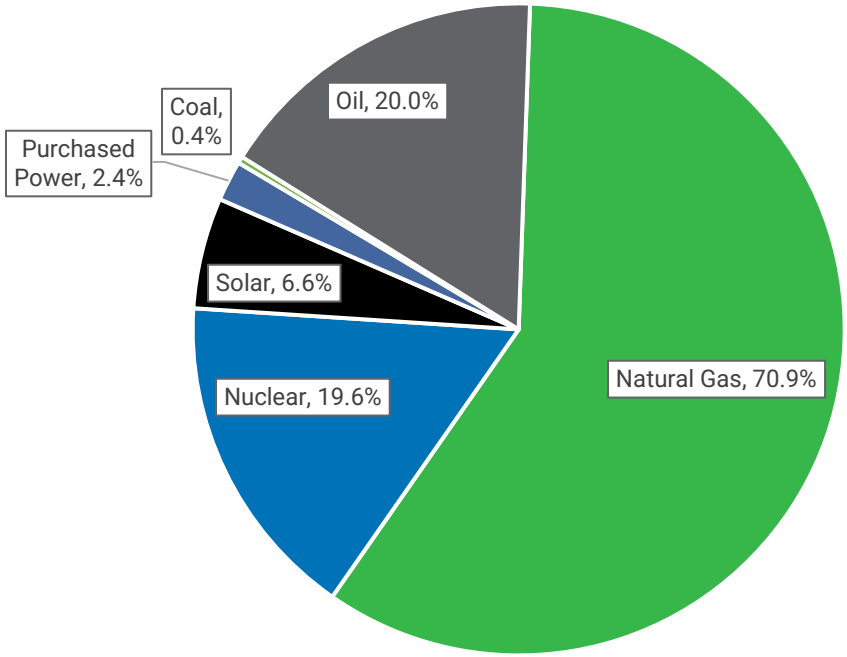
[1] Costs Associated With Compressed Natural Gas Vehicle Fueling Infrastructure, US Department of Energy, https://afdc.energy.gov/files/u/publication/cng_infrastructure_costs.pdf

In general, hybrid buses are known for their compromise in emissions and reliability between a diesel and a battery electric bus. Route characteristics and bus configuration may affect the performance of a hybrid bus, which often leads to lower reliability of the vehicle than their diesel and CNG counterparts. Nonetheless, most data shows that hybrids are much more fuel efficient than their diesel counterparts.

2.2.1.5 Battery Electric

Battery electric buses are a zero-emission technology powered by electricity from rechargeable batteries, which draw energy from the local electric grid. The environmental impact of battery electric buses depends on the fuel mix used by the local utility provider, in this case, primarily FPL. **Figure 2-4** shows the most recent fuel mix reported by FPL, CAT's primary local electric utility provider.

FIGURE 2-4: FPL ELECTRIC GENERATION FUEL MIX SOURCES (2024)



Source: Florida Power and Light, Energy News (2024)

Battery electric buses are evolving rapidly with every year bringing new, more efficient models, but the technology is still not mature. Battery electric buses draw concern due to multiple factors:

- Limited mileage range per charge
- Battery production and life cycle
- Lengthy charging times
- Variability in electric consumption affected by factors such as load, terrain, and climate

Buses carry large batteries that can be recharged and switched out as needed. These batteries require investments in charging infrastructure, with three main charging systems available

1. **Stand-alone Chargers:** This is the most widely used charging system. Chargers can be placed either at the depot or on the right of way, where buses can park next to the chargers and plug into the adapter.
2. **Pantograph Chargers:** These chargers require overhead wiring and a pantograph, an extension that transfers electricity from the overhead wiring into the electrical unit on the bus.

3. I**nduction Chargers:** These chargers provide electricity to buses via electromagnetic induction where buses park over coils that are placed in the street surface to transfer electricity on board.

Most fleets start with stand-alone chargers, typically charging buses overnight at depots. Pantograph and induction chargers offer in-service boosts at stations with longer dwell times. These chargers may require facilities in the right of way and are more useful for larger battery electric fleets with high frequencies.

Two forms of charging exist for buses: long-range charging or fast charging. Long-range charging is typically used overnight to charge vehicles for the following day. A full charge may require up to six hours, and the range may still be inadequate for some operational blocks. Overnight charging provides the cost benefit of lower electric rates, thereby keeping fuel costs down.



Source: APTA

Fast charging is generally used in-route to provide a quick recharge of batteries to extend range. To implement fast-charging, in-route facilities require careful coordination to provide enough time to recharge and an understanding that the boost may be minimal compared with energy output. Scheduling for the charging facility is needed to avoid overlap, which can be difficult for low frequency systems using a pulse schedule. Additionally, since fast charging facilities are used in-route, they draw energy during daytime hours when the cost of electricity is typically higher than overnight. Fast charging may also need grid upgrades, as battery electric buses require 480 volts in three phases, while typical commercial supply is 240 volts.

Transitioning to battery electric buses involves considerations for maintenance and repair, with mechanics requiring specialized training. While battery electric buses theoretically need less maintenance due to fewer mechanical parts, practical experience may vary, and agencies often need to expand parts inventory. Moreover, complex repairs that cannot be addressed by local mechanical crews may require that a bus be taken out of service to be repaired by the manufacturer.

As noted under the hybrid section, concerns have been raised about lithium mining needed to produce these batteries.

2.2.1.6 Hydrogen Fuel Cell Electric

Hydrogen FCE buses are zero-emission vehicles that use hydrogen to generate electricity, emitting only water vapor. Despite being the cleanest mobility technology, FCE buses have low market penetration due to high costs and the need for new parts.

Hydrogen FCE buses expose hydrogen to oxygen to create electrical energy that powers the electric motor to propel the bus. While hydrogen is an abundant and renewable natural element, the gas is highly volatile and requires pressurization to be used as a fuel.

Hydrogen propulsion systems are similar to a battery electric bus, while its gas injection and maintenance is very similar to CNG buses. Hydrogen FCEs are in a stage of near maturity, but they remain expensive relative to other technologies.

Fueling options include on-site or off-site hydrogen production, though off-site sources are rare. Moreover, on-site fueling requires a substantial investment in infrastructure to deliver hydrogen. Hydrogen, like CNG, may be provided through trailered cylinders acquired locally. Hydrogen may also be stored in a liquid state. Finally, and more commonly, hydrogen may be created on site, using components similar to CNG such as a compressor, storage units, coolers and dispensers. The increased level of volatility requires more expensive materials, driving up costs significantly.



Source: https://www.act-news.com/

Due to complexity and the low levels of both demand and supply, training for such a fuel alternative is more challenging than with other fuel alternatives. Moreover, manufacturers of hydrogen equipment possess a stronghold over maintenance and repairs, meaning that specialized crews provided by manufacturers are required to perform maintenance, leading to increased lifespan costs and operational inefficiencies. Still, hydrogen FCE buses have fewer mechanical parts than diesel engines and offer a longer range than battery-electric buses, making them an appealing alternative.

Overall, nearly $3 to $5 million are required to build or modify facility conditions to adequately allow the use of hydrogen, while also requiring nearly 4,500 square feet of space. The cost of hydrogen equipment continues to drop over time, making it more affordable. The initial investment in hydrogen as an alternative may be expensive, but larger hydrogen fleets reduce the investment per vehicle costs.

2.2.2 Technology Comparison

The following section summarizes the data side-by-side to make comparing fuel technologies easier. **Table 2-2** compares key considerations for the various alternative fuel technologies. Several factors are assessed and correspond to five broad categories of impact:

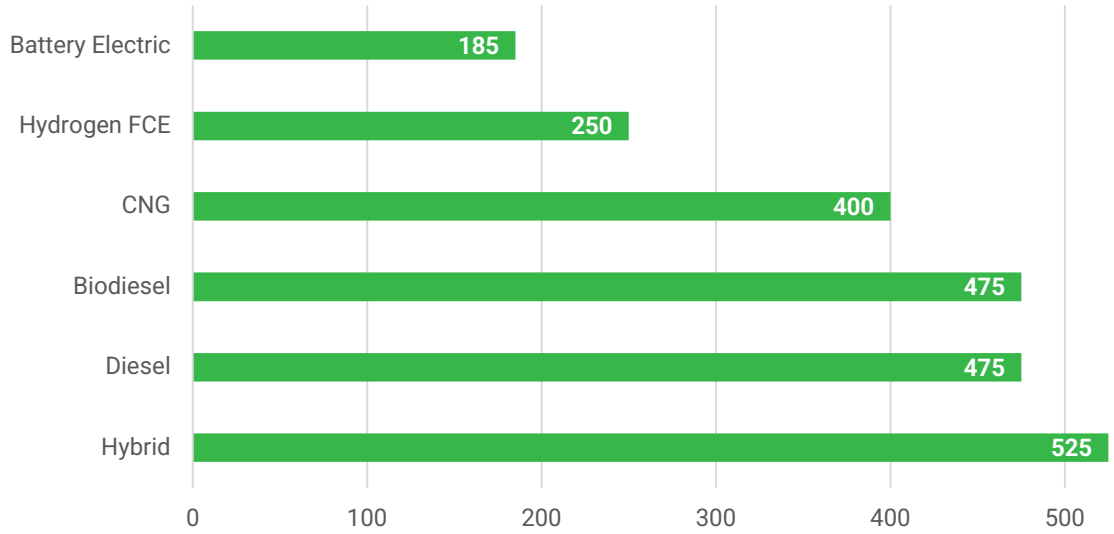
- **State of Technology:** Evaluates the current state of each alternative fuel technology such as the level of technology maturity, current industry adoption rate, the coordination required with various parties to deliver services using the technology for each bus, etc.
- **Financial Impact:** Considers the impact that each technology may have on agency finances, such as lifecycle costs, vehicle costs, and potential grant funding for each technology.
- **Impact to Facility Spaces:** Assesses the impact that the adoption of each fuel alternative technology may have on existing facility spaces, like whether using the fuel alternative requires facility upgrades or if additional space may be needed for new facilities.
- **Operations and Maintenance Impact:** Considers daily impacts of adoption such as the operational burden on the route network, reliability, and the number of unknown factors that may present themselves over time.
- **Regional Impact:** Considers a technology based on regional factors, such as the successful adoption of a technology in the region or climate and terrain factors.

TABLE 2-2: ALTERNATIVE FUEL TECHNOLOGIES COMPARISON

	Diesel	Biodiesel	CNG	Hybrid	Battery Electric	Hydrogen FCE
State of Technology						
Current Adoption Rate	Phasing Out	Stagnant	Steady	Steady	Growing	Growing
Maturity	Mature	Mature	Mature	Evolving	Evolving	Almost Mature
Emission Reduction	None	Low	Low	Low	High	High
Coordination Level	Few	Few	Some	Some	Many	Many
Ease of Adoption	Easy	Easy	Challenging	Easy	Challenging	Challenging
Financial Impact						
Lifecycle Cost	Medium	Medium	Low	Medium	Low	High
Vehicle Cost	Low	Medium	Medium	Medium	High	High
Infrastructure Cost	Low	Low	High	Low	Medium	High
Grant Security	None	Low	High	High	High	Medium
Impact to Facility Spaces						
Added Footprint	None	Low	High	Low	Medium	High
Facility Upgrades	None	Some	Many	None	Many	None
Operations and Maintenance Impact						
O&M Cost	High	High	High	Medium	Low	High
Vehicle Range	Standard	Standard	Standard	High	Low	Standard
Additional Training	None	Low	High	Medium	High	High
Added Inventory	None	Minimal	High	Medium	Medium	High
Reliability	High	Medium	High	Low	Low	Medium
Refueling Time	5 mins	5 mins	5-15 mins	5 mins	4 to 6 hours	7-20 mins
Unknown Factors	None	Few	Few	Some	Many	Many
Regional Impact (Florida)						
Regional Climate and Terrain Impact	None	Low	Low	Low	Medium	Low
Regional Agencies with Technology	Broad	Some	Broad	Broad	Minimal	None

Because vehicle range is so important to technology adoption, **Figure 2-5** provides greater detail on the range of each technology. On a full tank, hybrid buses provided the greatest vehicle range, even an improvement over the vehicle range for diesel buses. CNG buses, offering a 400-mile range, perform similarly to diesel. Battery electric buses have a relatively low range, which can present a challenge for systems that operate on longer blocks and routes. Hydrogen FCE has a relatively short range as well. It should be noted that vehicle range is affected by many factors including load, use of auxiliary systems such as heating and cooling, terrain, weather, etc.

FIGURE 2-5 AVERAGE VEHICLE RANGE (MILES)



Sources: HART presentation, "Adopting new Fuel Technologies" (2017); Fairfax County DOT presentation, "Electric Buses Overview" (2020); and Academies of Sciences, Engineering, and Medicine, Guidebook for Deploying Zero-Emission Transit Buses (2020)

3 PEER EXPERIENCE

The following section will review the profiles of Collier County's selected peers to understand the implementation of alternative fuels in their respective fleets.

3.1 Peer Review

The selection of Pinellas Suncoast Transit Authority (PSTA), Lee County Transit (LeeTran), and Jacksonville Transportation Authority (JTA) as peers was informed by the ongoing CAT Transit Development Plan (TDP) as well as market research of Florida transit agencies with a history of alternative fuel adoption. PSTA, LeeTran, and JTA have already adopted or have plans to adopt alternative fuel technologies, making them relevant benchmarks for CAT's Zero-Emission Transition Plan. While PSTA and JTA were considered for their vast implementation of alternative fuel vehicles, LeeTran scored highly in the TDP's peer comparison criteria, which considered factors such as service characteristics, operational efficiency, and demographic similarities. Their experiences offer valuable insights into the challenges and opportunities associated with transitioning to alternative fuels. **Table 3-1** presents a summary of the peer agencies.

TABLE 3-1: SELECTION OF PEERS FOR REVIEW

Agency	Location	VOMS*	Fuel Types
PSTA	Pinellas County, FL	273	Diesel, Electric Hybrid, Electric, and Autonomous Vehicle Advantage (AVA)
LeeTran	Lee County, FL	91	Diesel, Electric Hybrid
JTA	Duval County, FL	225	Compressed Natural gas (CNG), Diesel, Renewable Natural Gas (planned), Autonomous Electric Shuttles (Planned), Hydrogen (Exploratory)

**Vehicles on Maximum Service*

3.1.1 PSTA

PSTA serves Pinellas County, Florida, a region with approximately 960,000 residents. PSTA operates 38 fixed routes, including local and regional express bus services, along with popular trolley services like the SunRunner Bus Rapid Transit (BRT), Central Avenue Trolley, and Jolley Trolley routes. These transit options connect major destinations, including downtown St. Petersburg, Clearwater Beach, and Tampa, ensuring comprehensive coverage for residents and visitors. The agency also provides paratransit services for riders with disabilities.

PSTA has been a leader in sustainability efforts, transitioning its fleet to more environmentally friendly technologies. While diesel buses remain the predominant fuel type, the agency has made significant strides in incorporating electric buses, supported by grants through programs like the Low- or No-Emission Vehicle Program. In addition, PSTA has experimented with autonomous vehicle technology, including the Autonomous Vehicle Advantage (AVA) pilot project, as part of its ongoing innovations in transit solutions reflecting its critical role in regional mobility and its commitment to sustainable and efficient public transportation.

3.1.2 LeeTran

LeeTran serves Lee County, Florida, providing public transportation across an 820-square-mile area with a population of about 802,178. The system operates 24 fixed bus routes, seasonal trolleys, and paratransit services for individuals with disabilities.

In 2022, LeeTran provided approximately 2.2 million trips and covered nearly 4.8 million revenue miles. Its transit offerings focus on connecting urban centers like Cape Coral, Fort Myers, and Bonita Springs. LeeTran's fleet includes 141 vehicles, primarily diesel-powered, with some hybrid-electric buses as part of efforts to improve sustainability.

3.1.3 JTA

The Jacksonville Transportation Authority (JTA) serves Duval County and parts of Clay and Nassau Counties, providing public transportation to a population of approximately 1.6 million residents. JTA operates a diverse transit network that includes fixed-route buses, paratransit services, and the First Coast Flyer BRT system, which offers express service along key corridors.

JTA has been a leader in alternative fuel adoption, prioritizing Compressed Natural Gas (CNG) as its primary fuel source. As of 2023, JTA operates 225 vehicles in maximum service, with a fleet mix of CNG and diesel buses, ensuring operational flexibility and cost efficiency. As part of a plan to modernize Jacksonville's downtown transit infrastructure, the agency has also been at the forefront of autonomous vehicle technology as it is set to introduce 14 autonomous electric shuttles.

Additionally, JTA is exploring Renewable Natural Gas (RNG) and Hydrogen technologies as part of its long-term sustainability strategy. By leveraging a combination of alternative fuels and cutting-edge transit solutions, JTA remains committed to enhancing service reliability, reducing emissions, and preparing for the future of urban transportation in Northeast Florida.

3.2 Summary of Peer Interviews

Interviews were conducted to determine the peer agencies' experience with alternative fuel vehicles. The detailed interview notes are included in **Appendix B**.

3.2.1 PSTA

The interview with PSTA representatives provided insights into the agency's transition to alternative fuel technologies. PSTA has been incorporating hybrid-electric buses since 2009–2010 and electric buses since 2016–2017, with a strategy aimed at reducing emissions, securing grant funding, and lowering maintenance costs. While most of their fleet consists of hybrid-electric buses, they are gradually expanding the electric fleet, though diesel trolleys continue to be part of the mix. They reported success with hybrids, minimal issues with electric buses, and a 270-mile range on some electric models, though challenges remain, such as charging infrastructure and limited deployment on express routes. PSTA secured initial funding through a BP oil spill settlement and demonstrated the viability of alternative fuel buses before seeking additional funding. Key points learned include avoiding inductive charging due to impracticality, ensuring leadership support for fleet transitions, and recognizing that hybrid vehicles serve as a good starting point before a full conversion to electrification. While some cost savings have been achieved through reduced maintenance, range limitations and infrastructure improvements remain ongoing challenges.

3.2.2 LeeTran

The interview with LeeTran representatives revealed their experience with a diverse fleet mix, including aging hybrid buses (in service since 2013), propane vehicles (since 2015), and two electric buses expected in 2026. Their technology choices were driven by grant availability and fuel cost savings, although the hybrids did not meet expected fuel efficiency gains. Propane buses were initially attractive due to rebates but presented operational challenges, such as limited range, mid-day refueling needs, and maintenance delays, including frequent fuel pump replacements and long wait times for parts. Electric buses were selected to align with clean energy goals, particularly in downtown areas. Training needs varied, with propane fueling requiring only basic instruction while hybrid maintenance needs required certified technicians. The agency emphasized the importance of having backup plans due to potential breakdowns and high towing costs, noting that the overall costs of implementing and maintaining alternative fuel buses have been significant.

3.2.3 JTA

The Jacksonville Transportation Authority (JTA) interview highlighted a predominantly compressed natural gas (CNG) fleet, making up 70% of their 197 fixed-route vehicles, with CNG adoption starting in 2013–2014 to support their BRT system. Their decision to use CNG stemmed from stable fuel costs and a successful public-private partnership for fueling infrastructure. While early adoption of battery-electric buses through a 2017 grant faced range limitations and charging infrastructure issues, JTA maintains a diesel fleet for operational resiliency. They plan to introduce 14 autonomous electric shuttles in June and are exploring renewable natural gas (RNG) and hydrogen options. Challenges include underperforming electric vehicle ranges and facility space constraints for chargers. JTA values a mixed-fuel approach for safety and operational flexibility, treating its zero-emission bus plan as an evolving document to meet vehicle retirement schedules while leveraging various funding sources.

3.3 National Case Studies

As markets across the U.S. continue to transition from gasoline/diesel to various types of alternative sources of fuel energy, it is important to understand how transit agencies have utilized new technologies to enable themselves to do so. To give a broader perspective on alternative fuel implementation at the national level, three case studies from other U.S. based transit agencies were reviewed. Each case study will provide details about the agency and its service, explain their efforts in transitioning to alternate fuel sources, and provide outcomes and lessons regarding the shift. The three transit agencies explored include:

- Reno, NV: Regional Transportation Commission of Washoe County (RTC Washoe).
- Albuquerque, NM: Albuquerque Rapid Transit (ART)
- Lexington, KY: Lexington Transit Authority (Lextran)

3.3.1 Reno, NV: Regional Transportation Commission of Washoe County (RTC Washoe)

RTC Washoe serves Reno, Sparks, and other parts of Washoe County, Nevada, providing public transit to a population of approximately 450,000. The agency operates fixed-route buses, paratransit services, and BRT. RTC has been a leader in alternative fuel adoption, with 80% of its fleet already hybrid or electric.

However, the agency faced challenges with electric buses, including limited range (80-120 miles) and decreased efficiency in cold weather or on hilly routes. To address these issues, RTC recently

introduced hydrogen fuel-cell buses, which offer a range of 300 miles, similar to diesel buses, making them suitable for longer routes. The agency is also building a hydrogen fueling station and providing innovative virtual reality training for mechanics to service the new buses.

Lessons learned include the importance of matching fuel technologies to operational needs, scalability of infrastructure, and proactive workforce training. RTC's approach demonstrates how agencies can balance diverse technologies to enhance sustainability and reliability.

3.3.2 Albuquerque, NM: Albuquerque Rapid Transit (ART)

Albuquerque Rapid Transit (ART), part of the ABQ RIDE system, serves Albuquerque, New Mexico, providing an essential transit backbone for the metropolitan area. ART is a BRT system that enhances connectivity along the Central Avenue corridor with high-capacity, efficient buses. ABQ RIDE overall provides over 13 million passenger trips annually, traveling approximately 160,000 miles daily.

ART's fleet initially used clean diesel buses, but the city has explored alternative fuel solutions as part of its broader sustainability goals. Recent developments include deploying electric buses, although early efforts faced challenges, such as operational issues and infrastructure gaps. These experiences highlighted the need for thorough pre-deployment testing and comprehensive charging infrastructure.

Lessons from ART include the importance of aligning technological upgrades with robust training for operators and maintenance staff. Albuquerque also demonstrated how transit projects like ART can serve as economic catalysts, fostering development along transit corridors.

3.3.3 Lexington, KY: Lexington Transit Authority (Lextran)

Lextran, the public transit agency serving Lexington, Kentucky, operates with a strong focus on sustainability and modernization. Its service area includes the Lexington-Fayette region, which has a population of over 320,000. Lextran offers a range of services, including fixed-route buses, paratransit, and campus shuttles.

In recent years, Lextran has made significant strides toward adopting alternative fuels. The agency has integrated CNG buses into its fleet, replacing aging diesel vehicles, and has introduced hybrid-electric paratransit vehicles. These initiatives were funded by federal programs like the Congestion Mitigation and Air Quality Improvement (CMAQ) program and the Low- or No-Emission Bus Grant Program. These upgrades not only mobile-source emissions but also lower operational costs and improve service reliability for riders. For example, in 2024, Lextran received over $4 million in federal funding to acquire six additional low-emission CNG buses, furthering its commitment to sustainability.

Lextran's transition to alternative fuel has provided valuable lessons. Leveraging federal grants has been key to modernizing its fleet without placing undue financial strain on the agency. Moreover, the focus on lower-emission vehicles aligns with broader environmental goals while enhancing community air quality and service dependability.

3.3.4 Summary of National Case Studies

The three case studies—RTC Washoe, Albuquerque Rapid Transit (ART), and Lextran—demonstrate the diverse approaches used by transit agencies in adopting alternative fuel technologies. RTC Washoe in Reno has strategically incorporated hydrogen fuel-cell buses to overcome range and terrain limitations, showcasing the importance of tailoring fuel solutions to specific regional needs. ART in Albuquerque initially faced reliability challenges with its electric bus fleet, highlighting the necessity of rigorous pre-deployment testing and robust infrastructure planning.

Meanwhile, Lextran in Lexington has successfully utilized federal grants to integrate CNG buses and hybrid-electric paratransit vehicles, emphasizing the role of funding in facilitating a sustainable transition. Across these agencies, alternative fuel adoption requires a thorough understanding of regional characteristics, proactive investment in infrastructure and workforce training, and strategic use of federal resources. By learning from these examples, other transit agencies can better navigate their own transitions to alternative fuels, balancing environmental goals with operational efficiency and reliability.

3.4 Key Takeaways for CAT

The lessons learned from these agencies are important for Collier County and CAT as the possibility of transitioning to different fuel types continues to be explored. Some key takeaways include:

- It is important to understand the range of EVs as buses may need to cover long distances daily. Use of EVs may need to be supplemented by other fuel and battery technologies to extend ranges.
- Any new infrastructure or modifications to existing infrastructure supporting alternative fuel strategies, including its maintenance, should be planned in advance to ensure a smooth transition.
- There are several alternate fuel types that may be explored using different vehicle types and fueling/EV infrastructure. Depending on the scale of changes, multiple fuel types may fit for different uses or route types.
- Funding sources for EV or Low/No-Emission vehicles have been available in the past. Exploring current available funding may provide opportunities for CAT to begin the process of transitioning fuel types.
- Other transit agencies are exploring alternate fuel types and the infrastructure that goes along with it. Even though there are issues that arise when doing so, these are efforts that agencies are utilizing to lower mobile-source emissions and to match community and infrastructure changes.

4 LOCAL, REGIONAL, AND STATE INITIATIVES

Understanding the broader landscape of initiatives that support alternative fuel vehicles or zero-emission vehicles (ZEV) implementation is critical to shaping CAT's decision-making and operational planning. This section provides a review of several local, regional, and state initiatives to provide valuable insights into best practices, infrastructure development, and strategic alignment for adopting electric and alternative fuel vehicles. The goal is to highlight key insights and opportunities that CAT can leverage as it transitions its fleet to alternative fuel types. The initiatives reviewed include:

- Federal Transit Administration Low or No Emission Grant Program
- Florida's Energy & Climate Action Plan (2008)
- Florida Electric Vehicle Roadmap Executive Report (2020)
- FDOT EV Infrastructure Master Plan (2021)
- CAT Transit Development Plan Major Update (2020) and Annual Progress Report (2024)
- Collier County Comprehensive Plan (2023)
- City of Naples Critical Assets and Facilities Adaptation Plan (2024)
- LeeTran FTA Bus Low- and No-Emission Grant Award (2022)

To enhance collaboration and leverage existing resources, CAT is encouraged to engage with other County departments managing large fleets—such as fire, police, solid waste, and education—to explore their experiences with ZEVs and alternative fuel technologies. These cross-departmental discussions are essential for addressing potential challenges, such as shared infrastructure and redundancy planning, and will inform CAT's approach to sustainable transit solutions.

4.1 Federal Transit Administration Low or No Emission Grant Program

The FTA's Low-No Program provides funding to help transit agencies purchase low- and zero-emission buses, such as electric or hydrogen-powered vehicles, and build facilities like charging stations to support these technologies. It also includes resources for workforce training to prepare transit workers to maintain and operate the advanced vehicles and infrastructure. The program aims to reduce air pollution, improve energy efficiency, and support climate goals while also promoting economic benefits like job creation and local manufacturing. By modernizing fleets, the program helps communities transition to cleaner, more sustainable public transportation systems, benefiting both the environment and public health.

Key Takeaways

- Provides critical funding to help transit agencies transition to low/no-emission technology.
- Includes electric/hydrogen buses and their associated infrastructure.
- Used to replace older, high-emission vehicles.
- Reduces greenhouse gas emissions, improves air quality, and aligns public transit with climate and sustainability goals.
- Includes training in the maintenance and operation of low/no emission vehicles and their associated facilities.
- Promotes job creation and supports local manufacturing.

4.2 Florida's Energy & Climate Change Action Plan (2008)

The Governor's Action Team on Energy and Climate Change developed a plan that will secure Florida's energy future, reduce greenhouse gas emissions, and heavily support and sustain strategic economic development in the emerging "green tech" sector. The plan concluded that Florida will be significantly impacted if: the current trajectory of greenhouse gas emissions is not reversed; addressing climate change can present significant energy benefits; energy management can reduce energy costs; investments in sustainable energy can stimulate Florida's economy; and that market-oriented regulations can guide a low-carbon economy.

Key Takeaways

- Transportation is the second-largest contributor to greenhouse gas emissions.
- Greenhouse gas emissions can be reduced through improving vehicle efficiency, shifting to more efficient fuel types, and reducing vehicle miles traveled.
- Transportation planning efforts should consider reductions in greenhouse gas emissions.
- Implementation of policies/strategies to include funding for non-SOV (single occupant vehicles) modes of travel.

4.3 Florida Electric Vehicle Roadmap Executive Report (2020)

Examines the current state and future needs of electric vehicle (EV) charging infrastructure across Florida. The report highlights the critical role of EVs in reducing greenhouse gas emissions and improving public health, outlines gaps in charging infrastructure, and provides recommendations for site selection, planning, and regulatory improvements. It also addresses specific challenges, such as rural and underserved community access, emergency evacuation needs, and aging infrastructure. The roadmap emphasizes the importance of collaboration among public, private, and state entities to support the transition to electric transportation.

Key Takeaways

- Identifies the need to address gaps in charging infrastructure and to upgrade existing chargers.
- Recommends temporary charging solutions for emergencies.
- Education and incentives are necessary to increase support for EV implementation.
- Collaboration among governments, businesses, and utility providers is important for successful implementation of EV infrastructure.

4.4 FDOT EV Infrastructure Master Plan (2021)

The Master Plan details a comprehensive course of action to efficiently and effectively provide EV charging infrastructure, supporting the goals of F.S. 339.287. This document serves as a starting point for both public and private entities to become familiar with the challenges and opportunities associated with EV charging infrastructure. It also serves as a guide for future legislative, agency-level and public engagement efforts. By advancing the use of EVs to improve air quality and fosters economic development by encouraging the expansion of the labor force to support EV infrastructure, this Master Plan also supports the Florida Transportation Plan (FTP). The EVMP supports opportunities to lower the total cost of vehicle ownership per household and enhances transportation equity. The primary objectives of the EVMP include: support short-range and long-range EV travel as well as emergency

evacuation in the state; adapt state highway infrastructure consistent with market demand; ensure availability of adequate and reliable EV charging stations.

Key Takeaways

- Charging a transit bus will require an electric grid with an output between 150kW – 350kW
- About 5 megawatts (MW) of power will be required to support 30-35 150kW chargers, which would support a 100-bus depot on a daily basis.
- The most common method of vehicle charging comes from on-site chargers; enroute charging is also used to extend bus range and improve operations where beneficial.
- Multiple buses may be necessary to run routes traditionally run by diesel, depending on battery size and charging strategy.

4.5 CAT Transit Development Plan Major Update (2020) and Annual Progress Report (2024)

The Transit Development Plan (TDP) is a 10-year plan for transit and mobility needs, cost and revenue projections, and community transit goals, objectives, and policies. The TDP major update occurs every five years with annual updates outlining progress the transit agency has made over the past year in achieving the goals and objectives identified in the last major update. CAT is currently updating the TDP for adoption later in 2025.

Key Takeaways

- Supports CAT transition to cleaner, alt-fuel vehicles.
- Establishes need for EV charging infrastructure to be used as vehicle chargers as well as public emergency generators during disasters.
- Explores solar energy as source for EV and operations of transit facility.
- Identifies previous and ongoing CAT grant funding for EV acquisition as well as assumptions on future funding availability.

4.6 Collier County Comprehensive Plan (2023)

The Collier County Comprehensive Plan emphasizes creating a safe, efficient, and sustainable multimodal transportation system while protecting natural and coastal resources. The Transportation Element focuses on reducing greenhouse gas emissions through improved traffic circulation, mixed land-use zoning, and enhanced pedestrian, bicycle, and public transit options. The Conservation and Coastal Management Element prioritizes climate adaptation and resiliency, with strategies to address flooding, storm surge, and sea-level rise while conserving water, energy, and biodiversity. Both elements encourage sustainable development and infrastructure improvements to support long-term environmental and community health.

Key Takeaways

- Transportation strategies include reducing vehicular trips, supporting transit/active transportation, and compliance with statewide goals and objectives.
- Calls for integration between local efforts and regional planning agencies.

- Long term climate resilience through monitoring sea-level rise, low-emission travel infrastructure, and sustainable land use.
- Emphasizes a balanced approach to development and environmental stewardship for enhanced community resilience and sustainability.

4.7 City of Naples Critical Assets and Facilities Adaptation Plan (2024)

Outlines strategies to mitigate the impacts of climate hazards, particularly flooding and extreme heat. The plan builds upon prior vulnerability assessments and identifies critical infrastructure, community facilities, and natural and cultural resources that require adaptation. Strategies are categorized into tiers based on priority, with actions ranging from policy updates to infrastructure projects. The plan emphasizes community and stakeholder engagement, as well as regional partnerships, to ensure effective implementation and resiliency enhancement.

Key Takeaways

- Ranks 47 strategies into high, medium, and low priority for addressing climate risks.
- Focuses on urgent needs to reduce the negative effects of weather events, such as flooding and extreme heat.
- Combines physical infrastructure upgrades with policy updates.
- Community input identified flooding as the greatest concern.
- Aims to secure funding, protect health, and enhance the city's resiliency and livability aspects.

4.8 LeeTran FTA Bus Low- and No-Emission Grant Award (2022)

Provided $1.66 billion in grants to transit agencies, territories and states across the U.S. to invest in bus fleets and facilities. Majority of funded projects use zero-emissions technology, which reduces air pollution.

Key Takeaways

- Awarded $3.9 million for LeeTran to purchase battery electric buses.
- Includes additional charging infrastructure.

5 UTILITY PROVIDER COORDINATION

The transition to electric vehicles within CAT's fleet requires the development of electric charging infrastructure as well as an overall greater use of the local power grid. To better understand the amount of electricity and its associated infrastructure needed when working towards the electrification of the CAT fleet, communication with Florida Power & Light (FPL) and the Lee County Electric Cooperative (LCEC) was established. The goal of communicating with these electricity providers is vital in gathering information regarding necessary infrastructure upgrades, in-route charging options, planning level-cost estimates, and future maintenance requests.

FPL's Power Distribution Group focuses on larger, commercial industry projects within the Collier County area. This group may work with CAT in developing their site for possible projects that would develop the capacity for on-site EV charging. Currently, the FPL Distribution Group is conducting an internal site review of the Collier Area Transit Administration Office at 8300 Radio Road, Naples, Florida 34104 to determine their local grid's capacity and availability to grow. Continued communication with FPL will provide CAT options for the establishment of EV charging on-site through the local power grid.

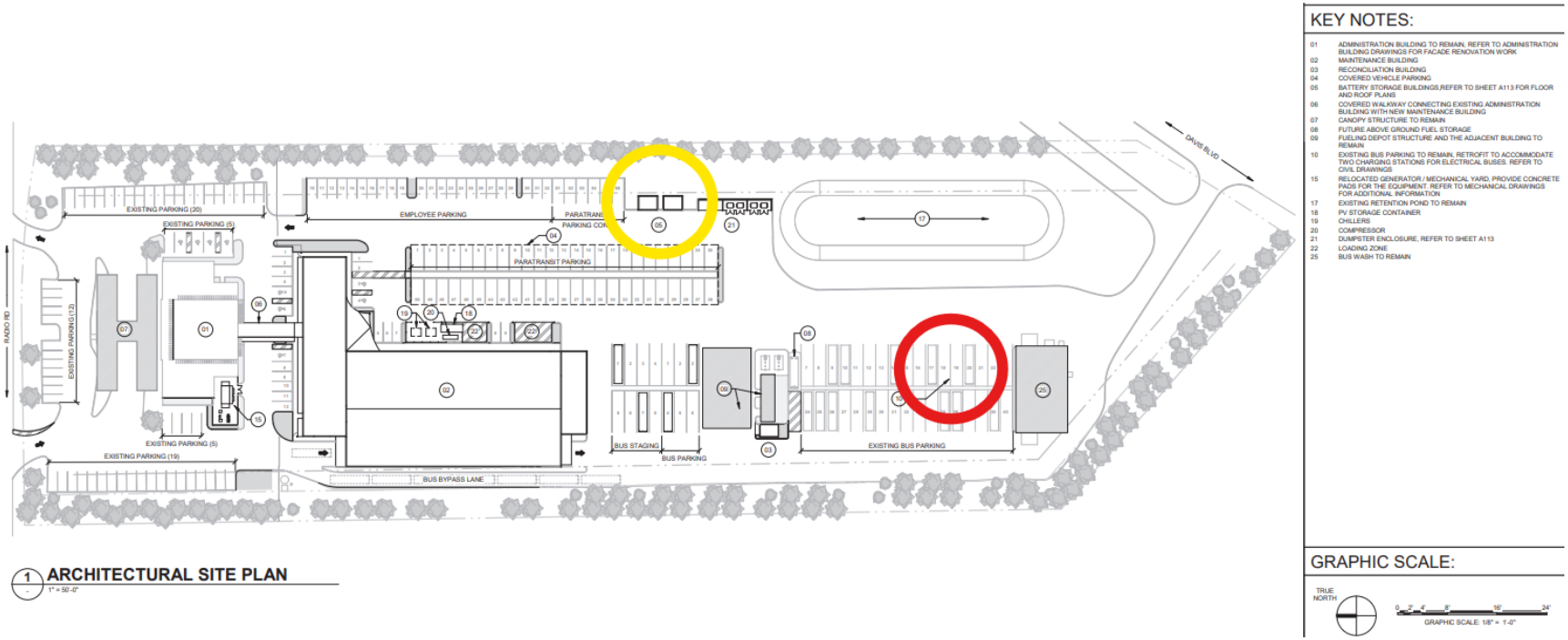
5.1 FPL EVolution

FPL's Evolution program provides comprehensive EV charging at residential and commercial levels. While the program is designed primarily for personal vehicles, fast charging and level 2 charging infrastructure can be provided, which may be used in the overnight charging of an EV bus or support vehicles. The EVolution Fleet program was created for commercial businesses to electrify their fleets. The program provides public fast charging stations at no cost, charging the driver of the EV based on the amount of electricity used for charging.

5.2 Facility Analysis

CAT has developed a site plan to include EV charging infrastructure at their administrative office. **Figure 5-1** highlights where the infrastructure will be located on the site. According to the plan, two new battery storage units will be installed on the west side of the site and are highlighted in a yellow circle. CAT also plans on retrofitting two of its current bus parking spaces to include EV charging stations, which may be used during buses' downtime to refuel the vehicle. The location of these spaces on the site is highlighted in a red circle. Overall, these electric infrastructure upgrades do not hinder the ability of the site, as the batteries are out of the way of vehicular traffic and CAT currently provides its vehicles with ample parking.

FIGURE 5-1: SITE PLAN FOR CAT ADMINISTRATIVE BUILDING



6 ALTERNATIVE FUEL FEASIBILITY

This section presents the findings of a comprehensive feasibility analysis conducted to evaluate the potential implementation of ZEVs and other alternative fuel vehicles within CAT's current transit network. The analysis includes a detailed assessment of fixed-route bus operations, demand-response paratransit operations, and equipment or support vehicle services. By modeling weekday, Saturday, and Sunday service levels, the analysis explores the operational feasibility of battery electric, hydrogen, hybrid electric, and compressed natural gas vehicles. Specific emphasis has been placed on evaluating battery electric vehicles under nominal and strenuous energy demand scenarios, while also considering factors such as battery degradation over the lifecycle of the vehicle.

This analysis aims to provide actionable insights into how fuel alternatives may align with CAT's operational needs and network requirements. Key considerations include the feasibility of vehicle block schedules, the potential addition of mid-route or off-site charging infrastructure, and the number of vehicles required to maintain efficient operations. The findings will support decision-making regarding the transition to a ZEV fleet, with the ultimate goal of achieving sustainable and efficient transit solutions.

6.1 Baseline Data

CAT provides service throughout Collier County through a total of 16 bus routes: 12 fixed routes, three circulators, and one express route. Fixed route service is provided seven days a week by CAT along with paratransit services through CATConnect for ADA clients and Transportation Disadvantaged clients. The following information was provided by CAT Staff to understand service provision, fleet size and other data that will help generate an understanding of the feasibility of introducing alternative fuel vehicles.

6.1.1 Fleet

CAT owns a fleet of 69 vehicles composed of revenue (rolling stock) and non-revenue (equipment) vehicles. **Table 6-1** summarizes CAT's current fleet composition by asset class and number of vehicles.

TABLE 6-1: CAT FLEET SUMMARY

Asset Class	Number of Vehicles
Fixed Route	*30*
Demand Response	*33*
Rolling Stock Total	63
Support (Equipment) Total	6
TOTAL FLEET SIZE	**69**

The following section describes the fleet by asset class with considerations regarding vehicle lengths, fuel types, and purchase years, as well as replacement period policies.

6.1.1.1 Fixed Route

At the time of this study, CAT's fixed route consisted of the following vehicles which are split into vehicle lengths and fuel types. The fixed route fleet is composed of 30-foot, 35-foot, and 40-foot buses. In total, CAT has 30 buses for fixed route service, with five additional buses currently in procurement. CAT's current fixed route fleet is largely made up of diesel buses, although CAT has experience with one hybrid diesel-electric bus and a new battery electric bus. **Table 6-2** presents the fixed route fleet by fuel type as well as vehicle lengths. **Table 6-3** presents the purchase year of the various buses in CAT's fleet. The largest purchases were made in 2022 and 2012, with six and five vehicles in each year respectively.

TABLE 6-2: FIXED ROUTE FLEET BY FUEL TYPE AND VEHICLE LENGTH

Vehicle Length	Diesel	Gasoline	Battery Electric	Total
30'	18**	2	0	**20**
35'	10**	0	1*	**11**
40'	4	0	0	**4**
Total	**32**	**2**	**1**	**35**

**In Procurement **Two in Procurement*

TABLE 6-3: FIXED ROUTE FLEET BY FUEL TYPE AND PURCHASE YEAR

Purchase Year	Diesel	Gasoline	Battery Electric	Total
2025	4*	0	1*	5*
2024	1	0	0	1
2023	4	0	0	4
2022	6	0	0	6
2020	0	2	0	2
2019	1	0	0	1
2018	1	0	0	1
2017	4	0	0	4
2016	3	0	0	3
2015	1	0	0	1
2014	2	0	0	2
2012	5	0	0	5
Total	32	2	1	35

** In Procurement*

CAT follows FTA's Minimum Useful Life Policy for the replacement of its vehicles: CAT replaces its 30-foot buses every 10 years, and its larger 35-foot and 40-foot buses every 12 years. CAT regularly evaluates its rolling stock's maintenance records to determine if a bus needs to be replaced, including if the bus has reached the indicated minimum replacement mileage, which would be 350,000 miles for the 30-foot buses or 500,000 miles for the 35-foot buses. For this analysis, the assumptions are based on the minimum useful years, but this does not preclude CAT from replacing vehicles as needed.

Based on these assumptions, CAT's current fixed route fleet is expected to be replaced as indicated in **Table 6-4**. The information in this table is important in building a replacement schedule that strategically moves CAT towards its vision for a low and zero-emission future.

TABLE 6-4: ESTIMATED FIXED ROUTE VEHICLE REPLACEMENT SCHEDULE

Replacement Yr.	Diesel	Gasoline	Battery Electric	Total
2037	2	0	1	3
2036	1	0	0	1
2035	2	0	0	2
2034	1	0	0	1
2033	4	0	0	4
2032	5	0	0	5
2031	0	0	0	0
2030	0	2	0	2
2029	1	0	0	1
2028	3	0	0	3
2027	5	0	0	5
2026	3	0	0	3
2025	0	0	0	0
2024	5	0	0	5
2023	0	0	0	0
Total	32	2	1	35

6.1.1.2 Demand Response

At the time of this study, CAT's demand response fleet consists primarily of 23-foot cutaway buses, with a handful of either 24-foot or 17-foot buses. In total, CAT has 33 cutaway buses for demand response service. CAT's current demand response fleet is largely fueled by gasoline, with a number of diesel-fueled cutaways. All six diesel cutaways are 23 feet in length. **Table 6-5** presents information regarding the demand response fleet by fuel type and vehicle lengths. **Table 6-6** presents the purchase year of the various cutaways in CAT's fleet. The largest purchases were made in 2019 and 2020, with eight and seven vehicles each year.

TABLE 6-5: DEMAND RESPONSE FLEET BY FUEL TYPE AND VEHICLE LENGTH

Vehicle Length	Diesel	Gasoline	Total
17'	0	3	**3**
23'	6	20	**26**
24'	0	4	**4**
Total	**6**	**27**	**33**

TABLE 6-6: DEMAND RESPONSE FLEET BY FUEL TYPE AND PURCHASE YEAR

	Diesel	Gasoline	Total
2024	0	3	3
2021	0	6	6
2020	0	7	7
2019	4	4	8
2018	0	4	4
2016	2	2	4
2012	0	1	1
Total	**6**	**27**	**33**

CAT follows FTA's Minimum Useful Life Policy for the replacement of its cutaways from its fleet every 5 years, regardless of vehicle length. CAT regularly evaluates its cutaway's maintenance records to determine if they need to be replaced, including if the cutaway has reached the indicated minimum replacement mileage, which would be 150,000. For this analysis, the assumptions are based on the minimum useful years, but this does not preclude CAT from replacing vehicles as needed

Following CAT's vehicle replacement guidelines, the current demand response fleet is expected to be replaced as indicated in **Table 6-7**. This information is useful in building a replacement schedule that strategically phases out conventional fuel vehicles, such as diesel and gasoline, for alternative fuel vehicles. The table does not reflect all vehicles that will be replaced since some will not be replaced until they have met the minimum replacement mileage. Additionally, some vehicles were not replaced at the desired time due to delays in the supply chain during COVID-19.

TABLE 6-7: ESTIMATED DEMAND RESPONSE VEHICLE REPLACEMENT SCHEDULE

	Diesel	Gasoline	Total
2029	0	3	3
2026	0	6	6
2025	0	7	7
Total	**0**	**16**	**16**

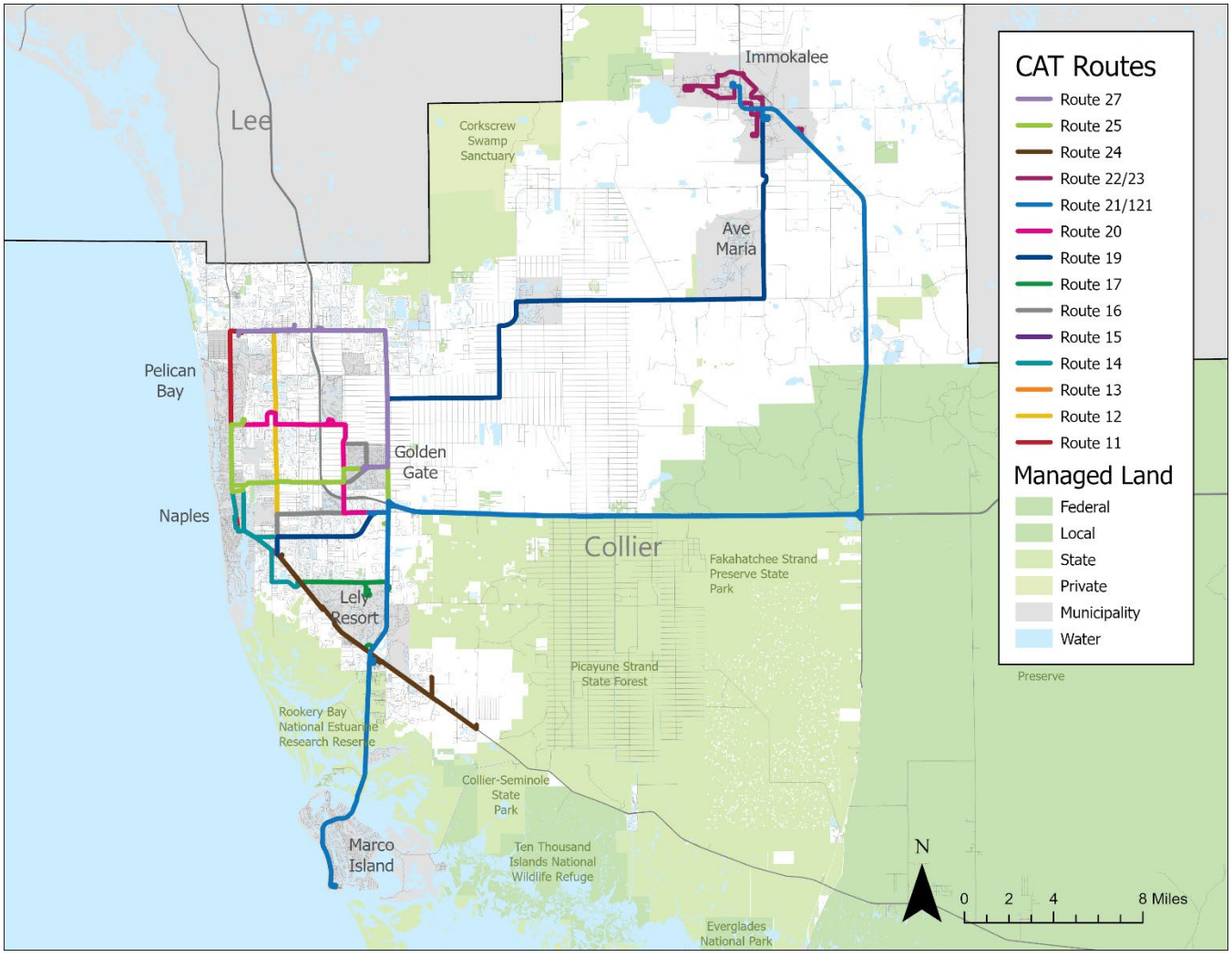
6.1.1.3 Support Vehicles

CAT operates a total of six support vehicles, all of which are gasoline fueled. Support vehicles include one sedan automobile, one sports utility vehicle (SUV), two minivans, and two pickup trucks. Two support vehicles were purchased in 2016, one in 2017 and three in 2018. Following FTA's minimum useful life policy of five years, however, asset management rules are generally less stringent about the useful life of support vehicles since they are not in revenue service. Additionally, it takes support vehicles a longer time to accumulate enough mileage before replacement is needed. CAT will be replacing its two minivans for two electric SUVs in the near future, both of which were purchased in 2018.

6.1.2 Fixed Routes and Service Blocks

CAT provides fixed route transit services across Collier County on 16 routes. **Map 6-1** presents the geographical coverage of CAT's fixed route system. Services generally cover the western, urban and suburban sectors of Collier County, including Naples, Marco Island, Pelican Bay, Golden Gate, North Naples, and other communities. Another set of routes and circulators serve Immokalee and Ave Maria which are in the northeastern portions of Collier County. Direct connections to Immokalee are provided by Route 19 to Collier County Government Center in Naples, and by Route 121 to Marco Island.

MAP 6-1: CAT ROUTES



Source: Collier Area Transit

Table 6-8 presents a profile of each CAT Route, identified by the numerical route designation along with a description of where these routes operate, service type, and route length.

Additionally, the routes were evaluated for the environment and traffic conditions under which they operate to understand how well some routes may combine with certain fuel types. Suburban routes tend to operate with fewer stops and generally on a faster pattern encountering low to medium levels of traffic. Some of these routes are long-distance commuter routes operating over suburban types of

roads. On the other hand, some routes operate in an urban context, encountering traffic and stopping frequently.

TABLE 6-8: CAT ROUTE PROFILES

Route Number	Description	Route Type	Route Length*	Route Profile
11	US 41 to Creekside Commerce Park	Fixed	27.6 mi	Suburban/Low Traffic
12	Airport Road to Creekside Commerce Park	Fixed	31.4 mi	Suburban/Medium Traffic
13	NCH & Coastland Center Mall	Fixed	17.4 mi	Urban
14	Bayshore Drive to Coastland Mall	Fixed	15.7 mi	Urban
15	Golden Gate City (Santa Barbara)	Fixed	28.3 mi	Urban
16	Golden Gate City (Santa Barbara)	Fixed	42.2 mi	Urban
17	Rattlesnake to FSW	Fixed	23.6 mi	Suburban/Low Traffic
19/19X	Golden Gate Estates and Immokalee	Fixed	40.4 mi	Suburban/Commuter
20	Pine Ridge Road	Fixed	29.2 mi	Urban
21	Marco Island Circulator	Circulator	37.4 mi	Urban
22	Immokalee Circulator	Circulator	22.2 mi	Urban
23	Immokalee Circulator	Circulator	22.2 mi	Urban
24	US 41 to Charlee Estates	Fixed	30.1 mi** 17.6 mi***	Suburban/Medium Traffic
25	Golden Gate Pkwy & Goodlette-Frank	Fixed	30.2 mi	Urban
27	Immokalee Road	Fixed	32.1 mi	Suburban/Low Traffic
121	Immokalee to Marco Island Express	Express	134.6 mi	Suburban/Commuter

** Represents the total inbound and outbound route lengths*
*** Represents the long route configuration*
**** Represents the short route configuration*

The Zero Emission Vehicle Transition Plan requires evaluating the feasibility of alternative fuel vehicles within existing operations. This assessment must consider not only route profiles but, more importantly, the number of trips a single bus completes on a route or a combination of routes, as determined by the agency's operations unit, referred to as a block.

A **service block**, **vehicle block**, or simply, a **block,** is a group of scheduled trips assigned to a single vehicle. These blocks are subject to the organization of the service provider and may follow a single route or may be split among multiple different routes. Blocks are designed with careful consideration for the number of available vehicles in a fleet, the maximum hours a driver can operate a bus, and miles before refueling, among other things.

To conduct this study, it is essential to determine the number of blocks CAT operates and the total miles a vehicle travels per block, including both revenue miles and deadhead miles.

CAT currently operates weekday service on 16 routes using 21 vehicle blocks. Four of these blocks are paired, with each pair served by a single vehicle. The operating hours for each block vary across weekdays, Saturdays, and Sundays, with some blocks not running on one or both weekend days. On Saturdays, 17 of the 21 blocks are in service, while 13 blocks operate on Sundays.

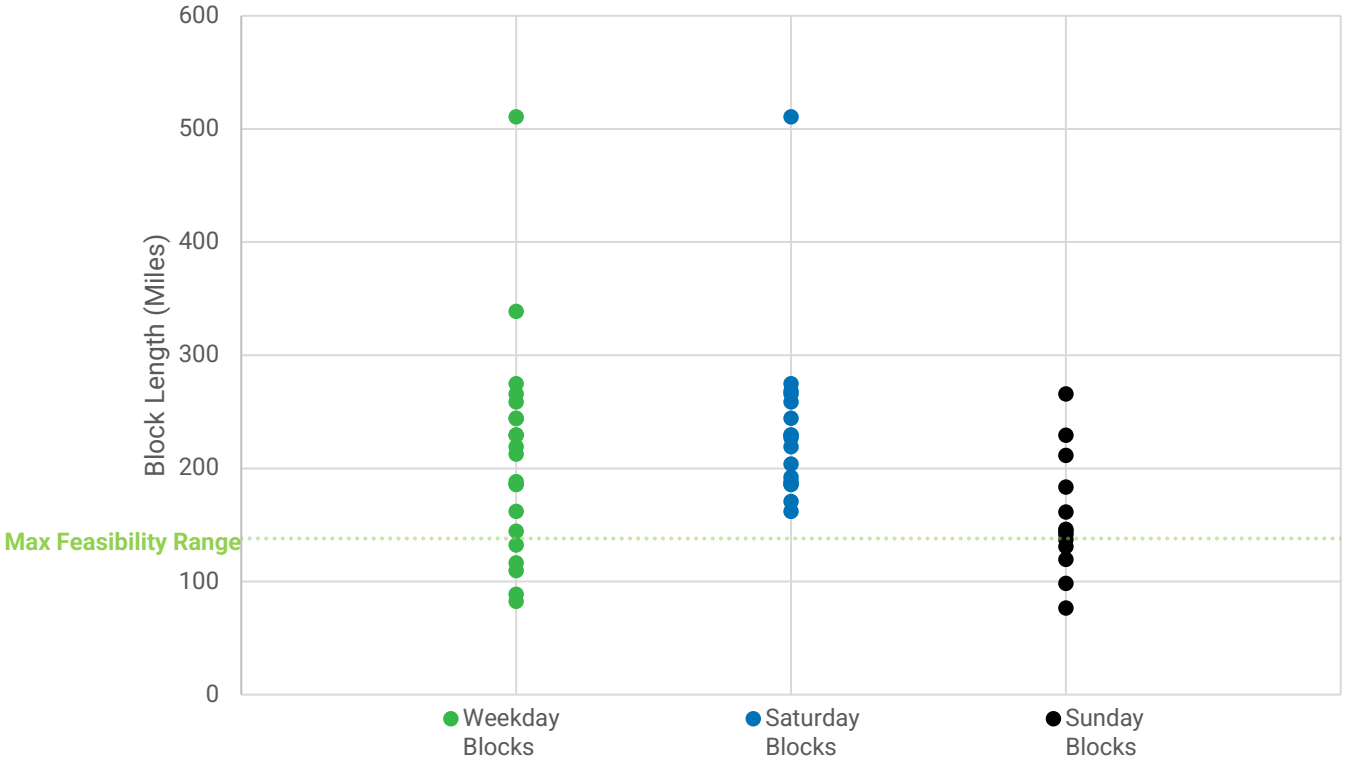
Table 6-9 presents the number of blocks in service by day and by vehicle length. Vehicle length is a key consideration for battery electric buses, as each length corresponds to a different battery capacity. This variation requires distinct assumptions when analyzing energy needs and operational feasibility.

TABLE 6-9: FIXED ROUTE SERVICE BLOCKS BY DAY OF WEEK AND VEHICLE LENGTH

Vehicle Length	Weekday	Saturday	Sunday
30'	16	12	9
35'	4	4	3
40'	1	1	1
Total	**21**	**17**	**13**

Figure 6-1 illustrates the distribution of block lengths in miles for each day of operation. On weekdays, most blocks fall between 100 and 300 miles, with two exceeding this range. Saturday blocks are generally longer, primarily ranging from 150 to 300 miles, with one block extending just over 500 miles. Sunday blocks are the shortest, typically between 100 and 250 miles. A general reference on electric vehicle feasibility range is added at around 125 miles as a quick reference to understand the distribution of blocks that may feasibly be served by battery electric buses.

FIGURE 6-1: DISTRIBUTION OF BLOCK LENGTHS FOR EACH SERVICE DAY



CAT service blocks are assigned simple integer identifiers ranging from 1 to 22, excluding Block 14 which is used for route maintenance purposes. Collectively, weekday blocks cover approximately 4,423 miles, including deadhead miles, and covering over 231 hours of total service, which accounts for deadhead and layover time. **Table 2-2** presents a comprehensive overview of service blocks, assigned routes, vehicle lengths, and operational details by day. Highlights of the operating conditions for the block schedule are listed below.

Weekday Service

Among weekday service blocks, Block 4 (assigned to Route 19) covers the longest distance at approximately 510 miles, followed by Block 10, which serves Routes 24 and 19, at around 339 miles. Route 19 is a long-distance commuter route that is nearly 50-miles long connecting Immokalee to the Collier County Government Center in Naples, contributing to Block 4's high mileage. Route 24 extends south of the government center along Tamiami Trail to Six L's Farm Road.

At the other end of the spectrum, Block 21 (serving Route 20) covers the shortest distance at 82 miles, followed by Block 22 (assigned to Routes 21 and 24) at 89 miles. Route 20 primarily operates along Santa Barbara Boulevard and Pine Ridge Road, while Route 21, the Marco Island Circulator, connects the Super Walmart on Collier Boulevard with Marco Island.

Saturday Service

On Saturdays, service blocks cover a total of 4,015 miles over 209 hours. Block 4 remains the longest, operating the same distance and weekday schedule Route 19. The second-longest block, Block 3, is assigned to Route 19's express service and Route 11, which runs along Tamiami Trail north to Immokalee Road.

The shortest Saturday block is Block 16, serving Route 22, at 162 miles, followed by Block 10. Route 22, known as the Immokalee Circulator, operates as a loop serving various points around Immokalee.

Sunday Service

Sunday service covers 2,046 miles and operates for 109 hours. The longest block, Block 1, is assigned to Route 13 and covers 266 miles, followed by Block 3, which spans 230 miles.

The shortest block, Block 2, runs Route 25 for 77 miles, followed by Block 5, which serves Route 16 at 98 miles.

TABLE 6-10: FIXED ROUTE SERVICE BLOCK PROFILES

Block No.	Vehicle Length	Assigned to Route(s)	Weekday		Saturday		Sunday	
			Time (Hours)	Distance (mi.)	Time (Hours)	Distance (mi.)	Time (Hours)	Distance (mi.)
1	40’	19/12	14:39	258.79	14:39	258.79	06:24	265.89
2/20	30’	25/19 Express	13:58	276.59	11:17	203.8	03:15	76.62
3	30’	19 Express/11	14:54	274.95	14:54	274.95	12:50	229.16
4	35’	19	17:55	510.62	17:55	510.62	10:16	146.04
5	35’	16	13:40	218.96	13:40	218.96	03:19	98.4
6	30’	121	06:24	265.89	06:24	265.89	12:08	211.6
7	30’	15	14:43	244.21	14:43	244.21	09:01	144.46
8	30’	11	12:23	185.94	12:23	185.94	10:53	161.3
9	30’	17	11:51	188.14	11:51	188.14	08:56	137.05
10	30’	24/19	13:09	338.74	06:29	170.69	07:13	130.84
11	30’	13	13:26	185.82	13:44	226.93	09:37	119.5
12	30’	27	13:56	244.1	11:14	192.16	08:39	141.62
13	35’	21	04:53	116.54	13:26	185.82	06:18	183.39
15/21	30’	20	11:14	192.17	12:50	229.16		
16	30’	22	12:50	229.16	11:35	161.92		
17	30’	14	11:35	161.92	12:50	229.48		
18	35’	23	12:50	229.48	09:18	268.37		
19	30’	24	12:44	212.64				
22	30’	21/24	04:08	88.76				
Totals			**231:12**	**4423.42**	**209:12**	**4015.83**	**108:49**	**2045.87**

6.1.3 Demand Response Service Details

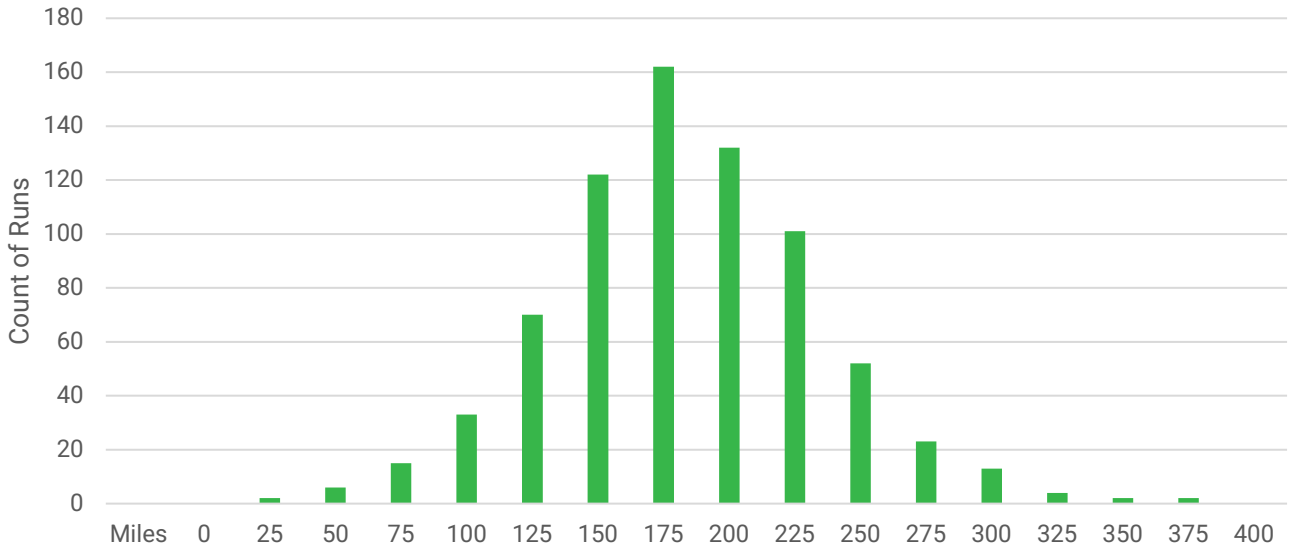
Demand Response operations are not served by routes or blocks, rather they are served by service runs. A service run is the total miles that a vehicle operates for a specific trip on a given day. Because the nature of this type of service is not fixed but based on demand, service details are less predictable. To account for the randomness of trip lengths, a sample of CAT's daily demand response run productivity was analyzed for the month of November 2024. **Table 6-11** provides a few descriptives from this data sample.

TABLE 6-11: DESCRIPTIVE DATA FROM NOVEMBER 2024 OBSERVED RUNS

Values	Miles
Minimum	35
First Quartile	166
Median	193
Average	196
Third Quartile	228
Maximum	400
Sample Size	N=739

The observed trip lengths range from 35 to 400 miles, with the most frequently occurring trips falling between 166 and 228 miles. The average trip length is 196 miles. **Figure 6-2** illustrates the distribution of trip runs in 25-mile intervals. The assessment compares the feasible service range to the various mileage values presented including average run, quartiles, percentiles, minimums and maximums.

FIGURE 6-2: DISTRIBUTION OF OBSERVED RUNS BY TRIP LENGTHS



N=739
Source: Collier Area Transit

6.1.4 Equipment/Support Mileage Details

Support vehicles are operated as needed, with each serving a distinct function, resulting in varying mileages across the support vehicle fleet. Data from the observed FY 24 mileage report for each vehicle is available, however, there is a lack of more detailed information such as daily vehicle usage data, which makes predicting service details for these vehicles challenging.

A set of conservative mileage estimates were developed to assess the feasibility of electric vehicles replacing the current support vehicle fleet. First, an estimated average daily mileage value is needed, which is the observed FY 24 mileage for each vehicle, divided by the number of service days (359), assuming operation of these vehicles occurred every day except for holidays.

Since actual daily mileage is assumed to be random, a value resembling the estimated maximum daily mileage was necessary for a robust feasibility analysis. To determine this, daily mileage values over the year were assumed to follow a normal distribution. The assumption takes that a value approximately one standard deviation from the mean encompasses a significant portion of the observed travel. Given the absence of a calculated standard deviation in the dataset, the empirical rule was applied, which assumes that one standard deviation is roughly 50% of the average value. Given these assumptions, the assumed maximum daily mileage is expressed as follows:

Estimated Maximum = Average + (1 X (0.5 X Average)) *which is also* **1.5 X Average**

The resulting estimated maximum values used in the feasibility analysis are indicated for each vehicle in **Table 6-12**.

TABLE 6-12: MILEAGE ASSUMPTIONS USED FOR EACH VEHICLE

Vehicle ID	Vehicle Type	Observed FY24 Mileage	Estimated Average Daily Mileage	Assumed Maximum Daily Mileage
CC2-2106	Minivan	21,975	59.6	89.3
CC2-2107	Minivan	20,625	55.9	83.8
CC2-2019	SUV	5,102	13.8	20.7
CC2-1553	Sedan	5,972	16.2	24.3
CC2-1662	Pickup Truck	24,222	65.6	98.5
CC2-1402	Pickup Truck	20,100	54.5	81.7

6.1.5 Facilities and Infrastructure

CAT operates seven key facilities throughout Collier County, serving as important stops or transfer stations. The largest of these include the CAT Operations and Transfer Station, which serves as the bus depot, the Intermodal Transfer Facility at the Collier County Government Center in Naples, and the newly opened CAT Transfer Facility in Immokalee. **Table 6-13** shows the names and location of CAT's various facilities.

When incorporating electric vehicles into a fleet, potential locations for charging infrastructure must be carefully evaluated. Charging site selection should consider service operations across the transit system, prioritizing layover points and locations where multiple routes converge as strategic recharging hubs. Additionally, a spatial analysis should be conducted to determine optimal placement for charging infrastructure and necessary electrical system expansions. While CAT has identified seven transfer locations for its services, only three of these facilities are owned by Collier County, where the

introduction of electric infrastructure could be facilitated. The three county owned facilities include the CAT Operations and Transfer Station, the Intermodal Transfer Facility at the Government Center, and the new CAT Transfer Facility in Immokalee. **Map 6-2** through **Map 6-4** indicate the location of these transfer facilities and the routes that have an established layover at each location.

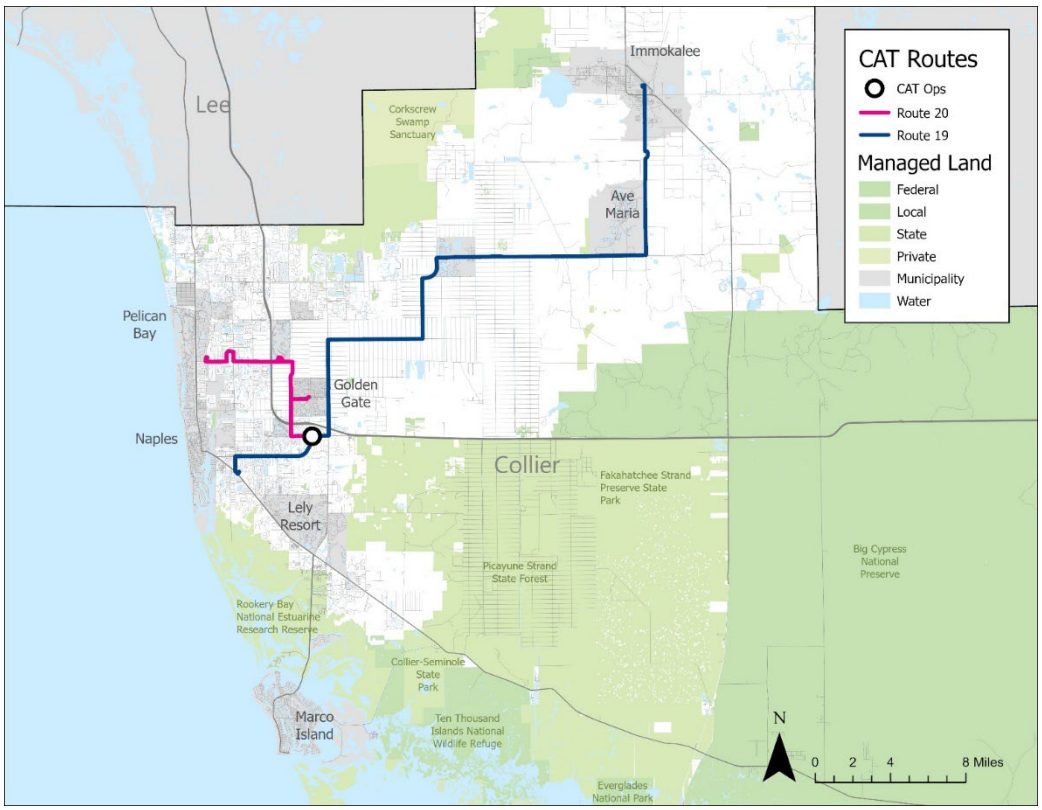
TABLE 6-13: CAT DEPOT AND TRANSFER FACILITY LOCATIONS

Depot / Transfer Station	Stop ID	Address
CAT Operations and Transfer Station	161	8300 Radio Rd, Naples, FL 34104
Intermodal Transfer Facility (Government Center)	1	3355 Tamiami Trail E, Naples, FL 34112
CAT Transfer Facility - Immokalee	398	155 Immokalee Drive, Immokalee, FL 34142
Creekside (Immokalee Rd.)	66	Immokalee Rd / Arthrex Way - North Naples, FL 34108
Walmart Plaza (US41 / CR951)	235	6650 Collier Blvd, Naples, FL 34114
Magnolia Square Plaza (Pine Ridge and Goodlette Frank Rd.)	471	5920 Goodlette-Frank Rd, Naples, FL 34109
Coastland Center	50	Fleischmann Blvd, Naples FL 34102

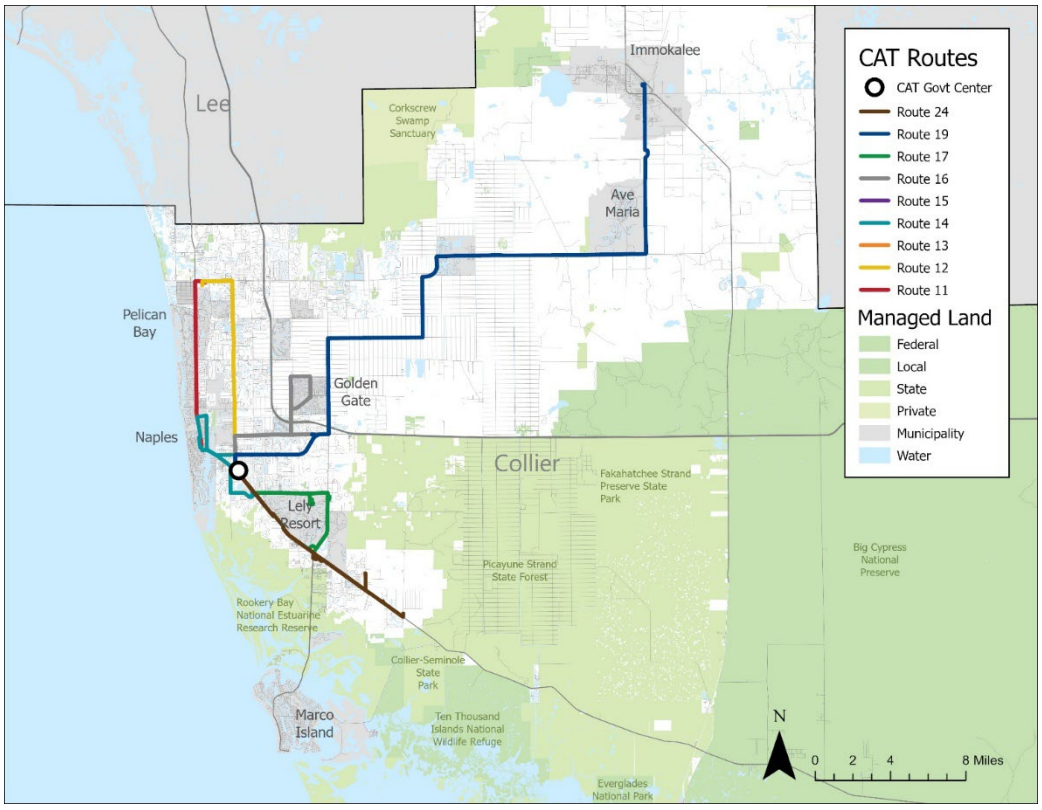
Source: Collier Area Transit

Examining these locations can help in strategizing both slow and fast charging approaches for electric vehicles and can provide understanding for which locations would have a higher demand for charging infrastructure.

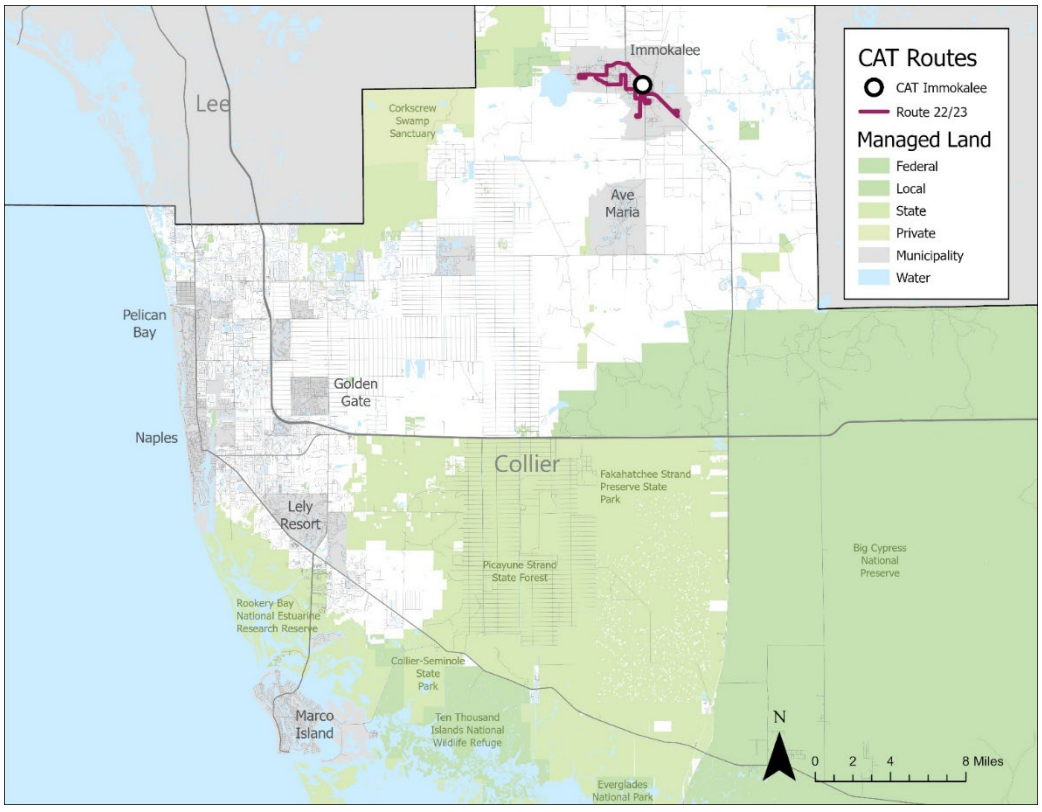
MAP 6-2: ROUTES WITH LAYOVERS AT CAT'S OPERATIONS CENTER



MAP 6-3: ROUTES WITH LAYOVERS AT THE GOVERNMENT CENTER INTERMODAL TRANSFER FACILITY



MAP 6-4: ROUTES WITH LAYOVERS AT THE IMMOKALEE TRANSFER FACILITY



6.2 Feasibility Analysis Assumptions

The following section outlines the assumptions used in the feasibility analysis, focusing particularly on those related to battery electric buses, which require special consideration. Assumptions for other fuel alternatives are addressed subsequently.

6.2.1 Battery Electric Assumptions and Considerations

The battery electric bus analysis evaluates the feasibility of transit operations considering multiple factors at the same time. Battery Electric Vehicles are susceptible to a few challenges in operation due to their low travel range output from a full charge compared to the experience of agencies with vehicles operating on conventional fuels such as gasoline or diesel which provide a longer range. Additionally, strenuous service conditions such as heavy loads, elevated terrains, and hot or cold weather, have adverse impacts over the energy output, limiting the range of operations that are actually able to be served. Moreover, batteries are known to experience degradation over time due to recharging cycles. This additional factor can have impacts over the expectation of service operations of a bus in its later years or may trigger the need to purchase a new battery. These factors are examined further in the following discussion.

6.2.1.1 Nominal and Strenuous Conditions

The battery electric bus analysis evaluates the feasibility of transit operations under two conditions, Nominal and Strenuous. These two conditions reflect the impact that external conditions may have on energy consumption. Energy consumption is measured in kilowatt-hours per mile (kWh/mi, analogous to miles per gallons, mpg) as a way to understand energy efficiency. Additionally, the auxiliary power is also evaluated. While an alternator in diesel buses is responsible for recharging the battery that powers auxiliary systems in those vehicles, there is generally no such system to support the auxiliary power in a battery electric bus. Therefore, auxiliary power is drawn from the same battery that powers the bus for propulsion, adding to the total consumption of energy drawn from the battery.

Assumptions for vehicle energy consumption and auxiliary power are detailed in **Table 6-14** in both nominal and strenuous conditions. Assumptions were developed for the average battery electric bus operating on terrains and climates similar to those in Collier County. These assumptions are used in the model for all vehicle lengths.

Assumptions will specify the vehicle types they apply to. "Fixed Route" (FR) will generally refer to all buses, but when a specific vehicle length is indicated (e.g., "30' FR"), it applies only to buses of that specific length. All cutaways will be designated as "Demand Response" (DR), regardless of length. Assumptions for the support/equipment fleet will be categorized separately by vehicle type, such as minivans, sport utility vehicles (SUVs), or pickup trucks and may be jointly be described as Electric Vehicles (EV).

TABLE 6-14: NOMINAL AND STRENUOUS ASSUMPTIONS FOR BATTERY ELECTRIC BUSES

Variable	Description	Assumption
Nominal Energy Consumption	Energy required to operate the vehicle under nominal conditions	1.85 kWh/mi for all FR 0.9 kWh/mi for all DR
Strenuous Energy Consumption	Energy required to operate the vehicle under strenuous conditions	2.14 kWh/mi for all FR 1.0 kWh/mi for all DR
Nominal Auxiliary Power	The amount of power needed to operate auxiliary systems under nominal conditions	6.5 kW for all FR 3.2 kW for all DR
Strenuous Auxiliary Power	The amount of power needed to operate auxiliary systems under strenuous conditions	27 kW for all FR 13.1 for all DR

6.2.1.2 Battery Utility and Degradation

The analysis also considers the impact of battery utility and degradation on the operational capabilities of battery electric buses. It has been observed that the nominal energy capacity labeled on a battery does not account for the energy that can be used reliably. A certain amount of energy is reserved for internal battery use, reducing the usable energy to a figure lower than the stipulated total battery energy.

Additionally, the feasibility model considers an additional reserve energy of 20 kWh, which acts as a safety net for buses to travel in cases of emergency or unexpected circumstances. Moreover, battery degradation has also been observed over the years of battery usage. This degradation is responsible for the slow decrease in battery capacity over time. Experience of use suggests that batteries have a 10-year useful life and that within this period, the battery's original energy capacity is reduced by 20%, giving an annual average degradation rate of 2%. Higher rates of degradation can be mitigated by proper battery recharging protocol, which will be discussed in another section.

Table 6-15 presents the assumptions regarding battery degradation and reserve energy used in the model. Additionally, the table reports the nominal (or total) battery energy for each bus length based on vehicle models available in the market in 2024, as well as the amount of usable energy available, and service energy for each vehicle. These battery capacities are presented in kWh and are also modeled for a new battery scenario in analysis year 2025, and in the end-of-life year 2035 considering the full impact of battery degradation over the years.

TABLE 6-15: BATTERY LIFE AND DEGRADATION ASSUMPTIONS

Variable	Description	Assumption
% of Original Capacity	Percentage of the original battery's capacity that is useable at the end of battery life	80%
Useful Life of Battery	The number of years of a battery's useful lifecycle	10 years
Annual Degradation	The annual Rate of Battery Degradation	-2%
Reserve Energy (kWh)	Estimated energy required to travel approximately 10 miles to the depot from an on-route location; a "safety net" to ensure the bus can return to the depot if a bus experiences an issue on-route, causing it to use more energy than expected.	20 kWh for all FR 9 kWh for all DR

Variable	Description	Assumption
New Battery Scenario (2025)		
Total Battery Energy (kWh)	The total energy contained in the battery upon purchase	30’ FR: 350 kWh 35’ FR: 420 kWh 40’ FR: 500 kWh DR: 113 kWh
Useable Energy (kWh)	The total energy that can be withdrawn from a new battery before needing to stop	30’: 280 kWh 35’: 336 kWh 40’: 400 kWh DR: 90 kWh
Service Energy (kWh)	Maximum energy that should be used in revenue service for buses with new batteries (“Useable Energy” minus “Reserve Energy”)	30’ FR: 260 kWh 35’ FR: 316 kWh 40’ FR: 380 kWh DR: 81 kWh
End of Life Battery Scenario (2035)		
Total Battery Energy (kWh)	The total energy contained in the battery at the end of battery life	30’ FR: 286 kWh 35’ FR: 344 kWh 40’ FR: 409 kWh DR: 93 kWh
Useable Energy (kWh)	The total energy that can be withdrawn from the battery before needing to stop	30’ FR: 229 kWh 35’ FR: 275 kWh 40’ FR: 327 kWh DR: 74 kWh
Service Energy (kWh)	Maximum energy that should be used in revenue service (Useable Energy minus Reserve Energy)	30’ FR: 209 kWh 35’ FR: 255 kWh 40’ FR: 307 kWh DR: 65 kWh

6.2.1.3 Battery Improvement

Although battery electric vehicles may currently seem limited in their ability to directly replace conventional fuel vehicles, ongoing research and development aimed at improving battery capacity is making this replacement more achievable each year. Studies show that battery capacity has increased by about 7% annually since 2012, with this rate accelerating as new technologies emerge. For this analysis, a 3.5% annual improvement in battery capacity was used to project which service blocks might become feasible over the next 10 years. Total, usable, and service energy data for each vehicle length are provided in **Table 6-16** for the model years 2030 and 2035.

CAT has procured an electric Gillig bus which at the time of this writing is being built. Notably, the bus has a significantly higher capacity than the average electric bus models available in the current market. Additional analysis based on a 686 kWh battery capacity was conducted, and the results are included in **Appendix D**.

TABLE 6-16: BATTERY CAPACITY IMPROVEMENT ASSUMPTIONS

Variable	Description	Assumption
Annual Battery Capacity Improvement	The annual rate of battery capacity improvements due to increased research and development in the industry over the current year's energy assumptions	+3.5%
2030 Battery Improvement Scenario		
Total Battery Energy (kWh)	The total energy contained in the battery	30' FR: 416 kWh 35' FR: 499 kWh 40' FR: 594 kWh DR: 110 kWh
Useable Energy (kWh)	The total energy that can be withdrawn from the battery before needing to stop	30' FR: 326 kWh 35' FR: 399 kWh 40' FR: 475 kWh DR: 88 kWh
Service Energy (kWh)	Maximum energy that should be used in revenue service (Useable Energy minus Reserve Energy)	30' FR: 306 kWh 35' FR: 379 kWh 40' FR: 455 kWh DR: 79 kWh
2035 Battery Improvement Scenario		
Total Battery Energy (kWh)	The total energy contained in the battery	30' FR: 495 kWh 35' FR: 592 kWh 40' FR: 706 kWh DR: 130 kWh
Useable Energy (kWh)	The total energy that can be withdrawn from the battery before needing to stop	30' FR: 396 kWh 35' FR: 474 kWh 40' FR: 565 kWh DR: 104 kWh
Service Energy (kWh)	Maximum energy that should be used in revenue service (Useable Energy minus Reserve Energy)	30' FR: 376 kWh 35' FR: 454 kWh 40' FR: 545 kWh DR: 95 kWh

6.2.2 Other Fuel Alternatives

Assessing the operational capacity of alternative fuel vehicles is generally less challenging than evaluating battery electric vehicles. Unlike battery electric vehicles, the performance of vehicles using other fuel types does not degrade significantly over their lifecycle and is more predictable. While external factors such as load, terrain, application scenarios, and climate do affect these vehicles, their impact is not as pronounced as it is for battery electric vehicles. Furthermore, refueling alternative fuel vehicles is typically a more straightforward and simple process, enabling these vehicles to cover greater distances without significant downtime for recharging or refueling.

6.2.2.1 Hydrogen Fuel Cell Electric Bus (FCEB)

Hydrogen buses operate with very limited impacts to service. Factors that can influence a FCEB include passenger load, terrain, and the efficiency of the fuel cell. A FCEB requires 10 to 20 minutes for refueling, making it easy to introduce into operations. The range of a FCEB is about 250 miles, which will be used as an assumption on vehicle range in the feasibility analysis.

6.2.2.2 Compressed Natural Gas (CNG)

CNG buses operate with limited impacts to service. Factors that impact fuel efficiency include passenger load, terrain, and importantly, driving patterns. Urban stop-and-go routes have a reduced range compared to highway or long drives. CNG buses can be applied more efficiently over suburban routes with less stop-and-go conditions, but not long commuter routes. A CNG bus requires about 10 to 20 minutes for refueling, making it easy to introduce into operations. The range of a CNG bus is about 400 miles.

6.2.2.3 Biodiesel

Biodiesel fuel is very much a direct substitute to diesel experiencing the same impacts to fuel efficiency that diesel buses do. Biodiesel fueled buses experience a slightly lower range due to the reduced energy density of biofuel compared to diesel, but the difference may be negligible. The most important consideration for a biodiesel fueled bus is that it may perform less efficiently in cold climates when no additives are introduced into the biodiesel mix since this fuel tends to coagulate in colder temperatures. The range of a bus running on biodiesel fuel is 475 miles.

6.2.2.4 Hybrid Diesel-Electric

Hybrid Diesel-Electric buses also act as a substitute for diesel with limited impacts to service. The Hybrid bus operates best in urban stop-and-go environments due to regenerative braking maximizing the efficiency of the bus. As such the longest ranges are experienced in these urban settings, and less in highway settings. The hybrid battery will also play a role in efficiency but may be negligible if well maintained during the vehicle's useful life cycle. The range of a hybrid diesel electric bus is 525 miles.

Table 6-17 presents a summary of alternative fuel vehicle range assumptions used for the feasibility study. The assumptions only consider a quarter tank equivalent of reserve fuel for each vehicle in case of any emergency. Additionally, the total vehicle ranges are also considered for each vehicle type, as presented in the previous discussion. Assumptions are made for both fixed route buses and demand response cutaways. If an alternative fuel type configuration is not in the market for demand response vehicles, these are excluded from the analysis as not available or "NA."

The metric used to assess feasibility is the assumed service range which is simply the difference between the total vehicle range for each vehicle type, and the fuel reserve assumption that is applied to all vehicle types.

Table 6-18 outlines additional qualitative factors considered during the feasibility assessment. These factors complement the route profile evaluations by offering strategic insights into the most suitable fuel alternative for each service block. While these considerations are particularly important when developing recommendations for Low or Zero-Emission transition strategies or scenarios, they do not preclude the use of alternative fuel vehicles on blocks that may not fully align with these factors.

TABLE 6-17: SUMMARY OF ALTERNATIVE FUEL VEHICLE RANGE ASSUMPTIONS

Variable	Description	Fuel Alternative	Assumption
Fuel Reserve	The policy of having a fuel reserve for vehicles as a "safety net" to ensure the bus can return to the depot if a bus experiences an issue on-route requiring added fuel.	All Fuel Types	25% or ¼ Tank Equivalent
Total Vehicle Range	Estimated maximum range of travel for all buses on a full tank or equivalent for each respective fuel type	Hydrogen FCEB	250 miles for FR NA for DR
		CNG	400 miles for FR 275 miles for DR
		Biodiesel	475 miles for FR 350 miles for DR
		Hybrid Diesel-Electric	525 miles for FR NA for DR
Service Range	Maximum range of travel achievable for use in revenue service (Total Vehicle Range minus Fuel Reserve)	Hydrogen FCEB	188 miles for FR NA for DR
		CNG	300 miles for FR 225 miles for DR
		Biodiesel	357 miles for FR 263 miles for DR
		Hybrid Diesel-Electric	394 miles for FR NA for DR

TABLE 6-18: OTHER FEASIBILITY CONSIDERATIONS MADE DURING FEASIBILITY ASSESSMENT

Fuel	Other Consideration
Hydrogen FCEB	Fuel Cell Efficiency may degrade over time
CNG	Great for Suburban Routes, with mostly go conditions
Biodiesel	Cold climate impact over fuel
Hybrid Diesel-Electric	Operates best in urban stop-and go conditions

6.2.3 Assumptions used for Support Vehicle Assessment

Assumptions for support vehicles take into account the various vehicle models currently used by CAT and their electric vehicle equivalents available in today's market. The most common fuel alternatives available today are hybrid gasoline-electric and full-electric vehicles; hybrid models are not available for all vehicle types, so they were not considered in further analysis. Each vehicle's make and model was categorized under a group, and a suitable electric vehicle model was chosen to assess the impact of replacing it with a comparable electric option. **Table 6-19** presents this information.

TABLE 6-19: SUPPORT VEHICLE CURRENT INVENTORY AND THEIR EV EQUIVALENT

Vehicle Group	Current Inventory	Electric Model Equivalent
Minivan	Ford Transit	Ford E-Transit
SUV/Sedan	Ford Escape/Ford Taurus SEL	Chevrolet Equinox EV
Pickup Truck	Ford F-150 XL/XLT	F-150 Lightning

The assessment of electric support vehicles followed a more simplified approach than the analysis conducted for fixed-route buses and cutaways. While usable energy, reserve energy, and strenuous energy consumption were thoroughly detailed for buses and cutaways, this data is not readily available for the selected support vehicle models. To address this, a conservative assumption was applied to estimate a feasible service range. Specifically, 70% of the total available energy for all electric vehicle models was designated as the assumed safe service range. **Table 6-20** presents the nominal ranges for each vehicle model based on the manufacturer's specifications, along with the service range assumption used to evaluate feasibility.

TABLE 6-20: SERVICE RANGE ASSUMPTIONS USED FOR EACH VEHICLE GROUP

Vehicle Group	Nominal Range	Service Range Assumption
Minivan	159 miles	111 miles
SUV/Sedan	319 miles	223 miles
Pickup Truck	240 miles	168 miles

6.3 Model Results

The following section presents the results of the block feasibility model. The section first looks at results from the battery electric bus model for fixed route service blocks, followed by results for other fuel alternative vehicle types. The results are then presented in the same order for demand response vehicles, and equipment vehicles.

6.3.1 Fixed Route Block Results

The fixed route block feasibility model considers all the assumptions and considerations in the previous sections for fixed route buses. Assumptions for each of the three vehicle lengths are considered and tabulated separately for each service day.

6.3.1.1 Current Electric Bus Feasibility

The first scenario evaluates the potential implementation of battery electric buses in the current year (2025). The model is performed for each vehicle length testing for the various energy capacity assumptions determined, and accounting for battery degradation up to the 10th year of battery usage (2035) as well as nominal and strenuous conditions. Feasibly was determined as follows:

- **Feasible**: bus can feasibly operate the entire length of a block in strenuous conditions without tapping into reserve energy even after the potential amount of battery degradation in that given model year.
- **Maybe**: The bus may be able to operate but could potentially run into occasional issues where the reserve energy may need to be used. This indicator can also suggest the feasibility of a block if in-route or off-route charging were implemented.
- **Unfeasible**: The bus will likely fail to operate the entire length of a block unless major operational changes are made such as splitting a block, adjusting scheduled operations, reducing number of trips, or making the alignment shorter.

Table 6-21 lists blocks that are or may be feasible in this scenario. Detailed results can be found in **Appendix C** for each block.

TABLE 6-21: CURRENTLY FEASIBLE BLOCKS BY OPERATION DAY

Block	Vehicle Length	Block Feasibility by Operation Day		
		Weekday	Saturday	Sunday
2	30’			✓
4	35’			!
5	35’			✓
13	35’	✓		
22	30’	✓		

✓ = *Feasible* ! = *Maybe Feasible*

6.3.1.2 Future Electric Bus Feasibility

The second scenario evaluates the potential implementation of battery electric buses starting in a future year. Considering that electric battery capacities are improving at a rate of 7% annually, the availability of new blocks that can be feasibly served by battery electric buses can increase. The model looks at the purchase year's battery capacity and accounts for degradation as well as projected improvements until the battery’s tenth year. This tenth year is then analyzed for feasibility. As an example, for a bus purchased in 2025, feasibility is evaluated using the tenth year of its operation, which would be 2035. Therefore, the future scenario model identifies if a block can reliably support a bus throughout the entire ten-year period after it has been purchased. **Table 6-22** summarizes the various blocks will be or may be feasible for vehicles purchased in either 2025 or 2035. This will indicate which blocks flip from previously unfeasible to feasible in the next ten years. Detailed results from this analysis can be found in **Appendix C**.

TABLE 6-22: FUTURE FEASIBLE BLOCKS BY OPERATION DAY FOR PURCHASE YEARS 2025 AND 2035

Block	Vehicle Length	Block Feasibility by Operation Day					
		Weekday		Saturday		Sunday	
		2025	2035	2025	2035	2025	2035
2	30’					✓	✓
4	35’					!	✓
5	35’					✓	✓
7	30’						!
8	30’						!
9	30’						✓
10	30’						✓
11	30’						✓
12	30’						!
13	35’	✓	✓		!		!
16	30’				!		
17	30’		!				
22	30’	✓	✓				

✓ = *Feasible* ! = *Maybe Feasible*

Based on the results of the service modeling, one additional weekday block would become partially feasible by 2035: Block 17. Block 17 is expected to become partially feasible due to improved battery capacity for vehicle model years 2035 and beyond. Additional in route charging support could make this block fully feasible with the increased battery capacity.

6.3.1.3 Electric Re-Charging Scenario

A selection of blocks was further analyzed to understand the ability to support on-route or off-route charging strategies. Charger types were analyzed for their power output and by battery capacities to assess the amount of time required to charge a battery using one of these. Fast charging is best provided by Fast chargers with outputs between 150 kW and 350 kW. When looking at the recharge speed based for each charger, a broad assumption that one-minute of vehicle recharging is equivalent to one-mile gained in range was developed to encompass the overall recharging capacity which can range between a .8-mile gain to a 2 mile gain. The results are found in **Table 6-23**

TABLE 6-23: CHARGING OPTIONS AND TIME TO FULL CHARGE

Charger Type	Power Output (kW)	Time to Full Charge			
		350 kWh	420 kWh	500 kWh	686 kWh
DC Fast Charger (50 kW) or Induction Charger (60 kW)	50 kW	7h	8h 25m	10h	13h 45m
DC Fast Charger (150 kW) Induction Charger (180 kW)	150 kW	2h 20m	2h 50m	3h 20m	4h 30m
DC Fast Charger (350 kW)	350 kW	1h	1h 12m	1h 30m	2h
Overhead Pantograph (450 kW)	450 kW	45m	55m	1h 5m	1h 30m
Overhead Pantograph (600 kW)	600 kW	35m	40m	50m	1h 10m

Additional assumptions for the on-route charging scenarios include the implementation of fast DC chargers, with the only constraint being that the layover facility must be a county-owned property. Three main locations were identified: CAT Operations Center, Government Center, and Immokalee Transfer Facility. Blocks analyzed needed to have a layover at one of these locations. Vehicles traveling off-route to access a layover location needed to have more than 15 minutes, including deadhead to the off-route location to be considered a feasible off-route recharge location. The following briefly describes the selected routes and the assessment.

- **Block 2/20** Neither in the current scenario nor in the future scenario does Block 2/20 confidently complete a trip in the most strenuous circumstance. This would lead to failure in a worst-case scenario.
- **Block 15/21** would comfortably benefit from on-route charging at the CAT Operations Center through the 10th year in the current scenario. This block would be an excellent candidate for the on-route charging.
- **Block 17** would comfortably benefit from on-route charging at the Government Center through the 10th year in the current scenario. Considerations include the addition of chargers at the transfer station.
- **Block 11** in the current scenario would not benefit from recharging at the Government Center after the fifth year of purchase, when battery degradation will have impacted recharging

capacity significantly. However, Block 11 is expected to benefit from recharging starting in a future scenario.

- **Block 5** Neither in the current scenario nor in the future scenario does Block 5 confidently complete a trip in the most strenuous circumstance. This would lead to failure in a worst-case scenario.
- **Block 16** may be able to complete most of its trips after recharging at the Immokalee transfer station but could fail during its final deadhead trip back to the CAT Ops Center in the current scenario. Adding between 15 and 45 minutes of layover time in the schedule could make this possible. It is, however, possible that battery improvements make on-route charging feasible for Block 16 in a future scenario.
- **Block 18** may be able to complete most of its trips after recharging at the Immokalee transfer station but could fail during its final deadhead trip back to the CAT Ops Center in the current scenario. Adding between 15 and 45 minutes of layover time in the schedule could make this possible. It is, however, possible that battery improvements make on-route charging feasible for Block 18 in a future scenario.
- **Block 7** Neither in the current scenario nor in the future scenario does Block 7 confidently complete a trip in the most strenuous circumstance. This would lead to failure in a worst-case scenario.

It is expected that the on-route charging approach will allow 2 blocks (15/21 and 17) to operate comfortably with Battery Electric Buses. Three additional blocks (11, 16, and 18) will become feasible through on-route charging in a future scenario.

6.3.1.4 Current Alternative Fuel Vehicle Feasibility

The alternative fuel vehicle feasibility model assesses the viability of implementing alternative fuel buses in 2025, using vehicle range assumptions outlined previously in **Table 6-17**. Unlike battery electric buses, this model assumes that fuel type does not significantly impact vehicle range. Additionally, external factors affecting fuel efficiency, such as strenuous operating conditions, are not accounted for, as their impact is considered negligible for modeling purposes.

Tables 6-24 summarizes the model results based on the day of the week. Feasibility is categorized as follows:

- **Feasible**: The bus can operate the entire length of a block under most conditions without relying on fuel reserves.
- **Maybe**: The bus may complete the block but could occasionally require fuel reserves. This classification also applies to blocks that may be feasible if refueling is possible during layovers.
- **Unfeasible**: The bus is unlikely to complete the block without depleting fuel reserves unless major operational adjustments are made. These could include splitting the block, modifying schedules, reducing trips, or shortening the route.

More detailed information regarding each block and for each analysis year can be found in the **Appendix C**.

TABLE 6-24: FEASIBLE BLOCKS BY FUEL TYPE AND DAY OF OPERATION

Block	Vehicle Length	Block Feasibility by Operation Day											
		Hydrogen FCE			CNG			Biodiesel			Hybrid		
		Wkd.	Sat.	Sun.	Wkd.	Sat.	Sun.	Wkd.	Sat.	Sun.	Wkd.	Sat.	Sun.
1	40’				✓	✓	✓	✓	✓	✓	✓	✓	✓
2/20	30’		!	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
3	30’			!	✓	✓	✓	✓	✓	✓	✓	✓	✓
4	35’			✓			✓			✓	!	!	✓
5	35’	!	!	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
6	30’			!	✓	✓	✓	✓	✓	✓	✓	✓	✓
7	30’	!	!	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
8	30’	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
9	30’	!	!	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
10	30’		✓	✓	!	✓	✓	✓	✓	✓	✓	✓	✓
11	30’	✓	!	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
12	30’	!	!	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
13	35’	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
15/21	30’	!	!		✓	✓		✓	✓		✓	✓	
16	30’	!	✓		✓	✓		✓	✓		✓	✓	
17	30’	✓	!		✓	✓		✓	✓		✓	✓	
18	35’	!			✓	✓		✓	✓		✓	✓	
19	30’	!			✓			✓			✓		

✓ = *Feasible* ! = *Maybe Feasible*

HYDROGEN FCE

Based on the results of the service modeling, 5 weekday blocks are feasible (24% of blocks), 9 may be feasible, and 7 are not feasible. Only two blocks, Blocks 8 and 13 are feasible on weekdays, Saturdays, and Sundays.

CNG BUSES

The results of the service modeling indicate that all weekday blocks are feasible except for Block 10, which may be feasible, and Block 4, which is unfeasible. On Saturday, only Block 4 remains unfeasible, and on Sunday, all blocks are feasible.

BIODIESEL

Biodiesel fueled buses can feasibly serve all weekday and Saturday blocks except for Block 4, which is unfeasible. All Sunday blocks can be served feasibly.

HYBRID DIESEL ELECTRIC

All weekday blocks can feasibly be served by a hybrid bus on weekdays and Saturday except for Block 4 which may be served under certain conditions. All Sunday blocks can be served feasibly.

6.3.2 Demand Response

The following section presents feasibility results for demand response trips. The feasibility model considers all the assumptions and considerations previously presented for demand response cutaways. Assumptions are considered separately for each service day.

6.3.2.1 Current Electric Cutaway Feasibility

The feasibility assessment for electric cutaways differs from that of buses. To evaluate their viability, a month's worth of service runs was analyzed to represent typical trip lengths for demand response services throughout the year. Given that trip lengths vary based on client needs and locations, understanding the distribution of trips by length as a percentage of total trips during the observation period is crucial. This analysis provides insight into how effectively an electric cutaway can accommodate demand response trips as a percentage of accomplishable trips.

In the current scenario, the model results indicate that up to 1% of trips currently served by CATConnect can be feasibly served through 2030. This suggests that the technology is not capable of supporting a reliable amount of services for CAT's demand response unit. This is because most cutaway batteries have low capacities and may be impacted by the use of electric lifts and other additions common in demand response fleets, which in turn drain the battery quicker in addition to the fact that average trip lengths far exceed both nominal and strenuous mileage. Conversely, CATConnect may be serving longer than average demand response trips relative to its peers. This could be a factor due to land use distribution, where origins and destinations may be further apart from each other than in more urban settings.

6.3.2.2 Electric Results Future Scenario

The second scenario evaluates the potential implementation of battery electric cutaways in future years. Considering that electric battery capacities are improving at a rate of 7% annually, the ability for an electric cutaway to serve a larger share of demand response trips feasibly is possible. The model uses the assumptions of the current year's battery capacity (2025) and builds upon the battery's improved capacity over the next ten years (2035).

It is evident that electric cutaways will not be able to reliably assist the demand response fleet in the long-term, as improvements in battery capacity do not seem sufficient to cover even five percent of trips through 2035. Unless drastic operational changes were made to accommodate this challenge, it is strongly recommended that CAT not look into replacing any part of its DR fleet with electric cutaways.

6.3.2.3 Alternative Fuel Results

Unlike buses, alternative fuel cutaways are available in fewer configurations. This study evaluates CNG and biodiesel models, as they are compatible with the fuel types used by buses, allowing for shared fueling resources across the fleet. The analysis follows the same methodology applied to electric cutaways, assessing the distribution of demand response trips by length to determine the vehicle's effectiveness in meeting service needs. **Table 6-25** presents the results of this assessment.

TABLE 6-25: PERCENTAGE OF DR TRIPS SERVED FEASIBLY BY ALTERNATIVE FUEL CUTAWAYS

Observed Trips	Miles	CNG Cutaways	Biodiesel (Using Diesel Cutaways)
First Percentile	70	✓	✓
Fifth Percentile	110	✓	✓
Tenth Percentile	135	✓	✓
25th Percentile	165	✓	✓
Median	193	✓	✓
Average	195	✓	✓
50th Percentile	195	✓	✓
75th Percentile	230	!	✓
85th Percentile	245	!	✓
All Trips	400		

✓ = *Feasible* ! = *Maybe Feasible*

The results indicate that CNG cutaways can reliably serve up to 85% of trips currently provided by the DR fleet, making them a strong replacement option for a significant portion of operations; gasoline or diesel cutaways would still be necessary to accommodate the longest trips. Similarly, biodiesel-fueled cutaways are capable of serving nearly all DR trips, with only a few exceptions for the longest trips. This suggests that biodiesel could effectively replace the entire DR fleet with minimal operational disruptions.

6.3.3 Equipment/Support Vehicle

The following section presents feasibility results for CAT's equipment/support vehicles. The feasibility model considers all the assumptions and considerations previously presented for various vehicle models that best represent current vehicle types. Assumptions are considered separately for each vehicle depending on the observed annual mileage for each. The feasibility is only assessed for battery electric vehicles as models in other fuel types are uncommon.

6.3.3.1 Electric Results

Electric vehicle feasibility is assessed using the annual mileage observed for each vehicle. Because daily travel data for each vehicle is unavailable, feasibility is examined through a simple method where the individual vehicles assumed maximum daily mileage is compared with an assumed safe service range. The methodology and assumptions used for this analysis can be found in Sections 6.1.4 and 6.2.3. **Table 6-26** shows the results by vehicle.

TABLE 6-26: FEASIBILITY OF EVS TO SERVE THE MAXIMUM DAILY MILEAGE OF SUPPORT VEHICLES

Vehicle ID	Vehicle Type	EV Feasibility
CC2-2106	Minivan	✓
CC2-2107	Minivan	✓
CC2-2019	SUV	✓
CC2-1553	SUV	✓
CC2-1662	Pickup Truck	✓
CC2-1402	Pickup Truck	✓

✓ = *Feasible* ! = *Maybe Feasible*

The results indicate that electric vehicles can reliably replace minivans, SUVs, sedans, and pickup trucks in the existing support vehicle fleet, even on days when these vehicles travel long distances. If sufficient downtime is available throughout the day, recharging could maximize the usability of any of these vehicles.

6.4 Fuel Mix Recommendations

After reviewing the results of the feasibility model in the previous section, the output was considered for the development of possible fuel mix configurations that CAT can adopt to achieve a low or zero emission objective. The following looks at various approaches that CAT can consider for the replacement of its diesel and gasoline vehicles.

6.4.1 Fixed Route

Several possible scenarios can be considered when determining the fuel mix recommendations for the fixed route blocks. The first scenario is the most visionary approach, attempting to replace vehicles in a way that achieves the lowest emissions possible while accounting for reduced capital and operational challenges such as adding vehicles and blocks. The second scenario mimics the first scenario but simplifies the diversification of fleet, compromising for keeping two fuel types with minimal capital investment while maintaining a commitment towards battery electric buses. The third scenario minimizes the impact of capital costs but commits to a soft transition towards a low emission bus fleet. **Table 6-27** presents the recommendations under each scenario, proposing a replacement fuel type that best serves the stated objective.

TABLE 6-27: FIXED ROUTE FUEL MIX RECOMMENDATIONS

Block No.	Recommendations			
	Scenario 1: Least Harmful Emissions	**Scenario 2: Optimized Vehicle Function**	**Scenario 3: Balanced Approach**	**Scenario 4: Lowest Capital Cost**
1	Hybrid	CNG	Biodiesel	Hybrid
2/20	Hybrid	Hybrid	Hybrid	Hybrid
3	Diesel	Diesel	Diesel	Diesel
4	Diesel	Diesel	Diesel	Diesel
5	Hybrid	Hybrid	Hybrid	Hybrid
6	Hybrid	CNG	Biodiesel	Hybrid
7	Hybrid	Hybrid	Hybrid	Hybrid
8	Hybrid	CNG	Biodiesel	Hybrid
9	Hybrid	CNG	Biodiesel	Hybrid
10	Diesel	Diesel	Diesel	Diesel
11	Hybrid or BEB with On-Route Charging after 2030	Hybrid or BEB with On-Route Charging after 2030	Hybrid or BEB with On-Route Charging after 2030	Hybrid
12	Hybrid	CNG	Biodiesel	Hybrid
13	**Battery Electric**	**Battery Electric**	**Battery Electric**	Hybrid
15/21	Hybrid or BEB with On-Route Charging	Hybrid or BEB with On-Route Charging	Hybrid or BEB with On-Route Charging	Hybrid
16	Hybrid	Hybrid	Hybrid	Hybrid
17	Hybrid/BEB 2035+ or BEB with On-Route Charging	Hybrid/BEB 2035+ or BEB with On-Route Charging	Hybrid/BEB 2035+ or BEB with On-Route Charging	Hybrid
18	Hybrid or BEB with On-Route Charging after 2035	Hybrid or BEB with On-Route Charging after 2035	Hybrid or BEB with On-Route Charging after 2035	Hybrid
19	CNG	CNG	Biodiesel	Hybrid
22	**Battery Electric**	**Battery Electric**	**Battery Electric**	Hybrid

6.4.1.1 Scenario 1: Least Harmful Emissions

This scenario is designed to minimize the impact of harmful emissions in the environment given the operational conditions that CAT can provide within the study period. This maximizes the use of Battery Electric Buses, paired with the least harmful fuel alternative. When modeling the impacts of overall carbon emissions, Hybrid vehicles paired well with battery electric vehicles, due to their balanced profile of carbon emissions, as well as hybrid vehicle's well-to-wheels lifecycle cost on the environment, which is overall slightly lower than CNG buses for example. Additionally, Hybrid vehicles have a reliable range to accommodate CAT's current operations. Finally, a small portion of blocks would remain diesel. **Figure 6-3** demonstrates the expected fuel mix assigned to blocks for Scenario 1A.

A variation of Scenario 1 (1B) was also evaluated, which also aims to minimize the impact of harmful emissions in the environment. This variation maximizes the use of Battery Electric Buses by adopting on-route charging. When modeling the impacts of overall carbon emissions, Hybrid vehicles remained a choice support for battery electric vehicles, due to their balanced profile of carbon emissions. In this scenario, the objective is to flip as many blocks towards Hybrid as possible. A small portion of blocks would remain diesel, representing the longest blocks, as well as the need to retain a portion of the fleet fueled with diesel buses in the case of emergency operations in the absence of electricity. **Figure 6-4** demonstrates the expected fuel mix assigned to blocks for Scenario 1B.

FIGURE 6-3: SCENARIO 1A (NO ON-ROUTE CHARGING)

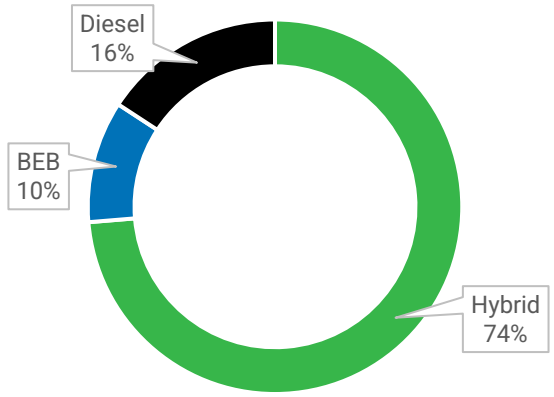
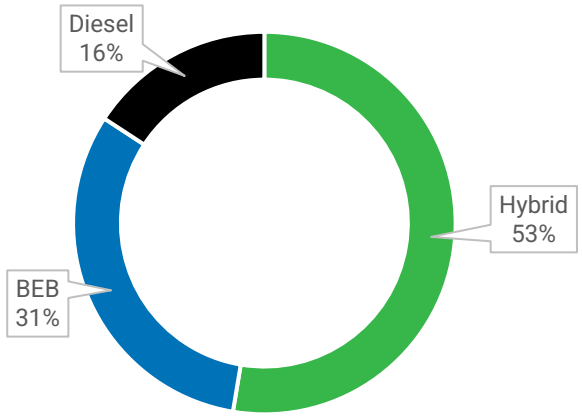


FIGURE 6-4: SCENARIO 1B (ON ROUTE CHARGING)



6.4.1.2 Scenario 2: Optimized Vehicle Function

Scenario 2 focuses on optimizing vehicle functions by assigning them to the environments and route profiles where they operate most efficiently. This approach minimizes unnecessary strain on the vehicles, potentially reducing breakdowns and extending fleet longevity. This scenario presents a more experimental approach with a largely diverse fuel mix. This scenario suggests the implementation of CNG as the low-emission fuel of supporting some of CAT's longest blocks with consideration of the suburban nature of parts of the county. This scenario also maximizes the inclusion of battery electric buses without on-route charging. **Figure 6-5** demonstrates the expected fuel mix assigned to blocks for Scenario 2A.

A variation of Scenario 2 (2B) is presented which also aims to maximize the functionality of each vehicle type with regards to operating environment. This variation maximizes the use of Battery Electric Buses by adopting on-route charging. A small portion of blocks would remain diesel, representing the longest blocks, as well as the need to retain a portion of the fleet fueled with diesel buses in the case of emergency operations in the absence of electricity. **Figure 6-6** demonstrates the expected fuel mix assigned to blocks for Scenario 2B.

FIGURE 6-5: SCENARIO 2A (NO ON-ROUTE CHARGING)

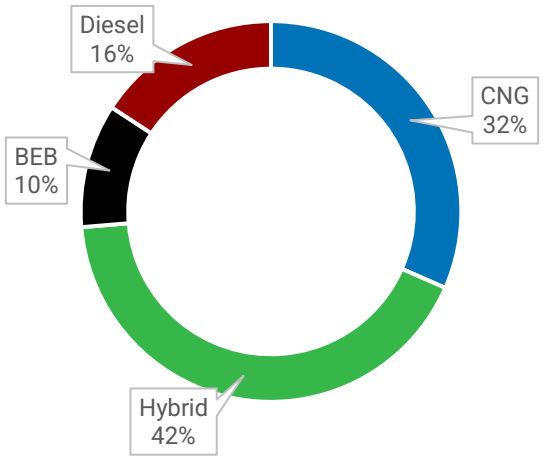
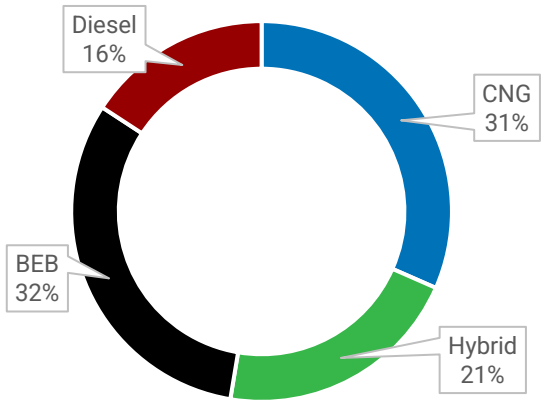


FIGURE 6-6: SCENARIO 2B (ON-ROUTE CHARGING)



6.4.1.3 Scenario 3: Balanced Approach

Scenario 3 balances capital costs and emissions to achieve the optimal balance between both. This scenario represents a commitment to reduced emissions while also controlling costs. This scenario was best achieved by including biodiesel fuels which reduce capital costs based on the need to only purchase a tank to hold the fuel and its dispensers, which can be added to existing diesel fueling infrastructure. It also retains a larger portion of diesel vehicles in the fleet than other scenarios.

A variation of Scenario 3 (3B) was also evaluated, with the inclusion of battery electric buses. Scenario 3B demonstrates that a continued increase of electric vehicles that are feasible for each block, a decrease in the hybrid fleet is observed. Meanwhile the diesel and biodiesel group is maintained, controlling capital costs.

The fleet fuel mix for Scenario 3A and Scenario 3B are shown in **Figure 6-7** and **Figure 6-8**.

FIGURE 6-7: SCENARIO 3A (NO ON-ROUTE CHARGING)

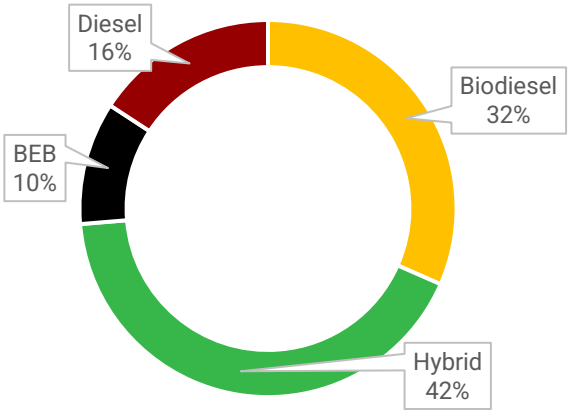
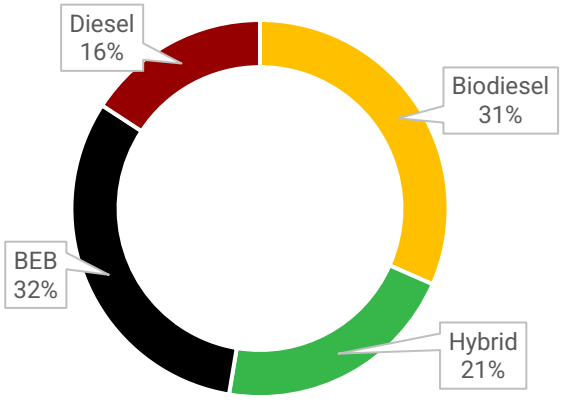


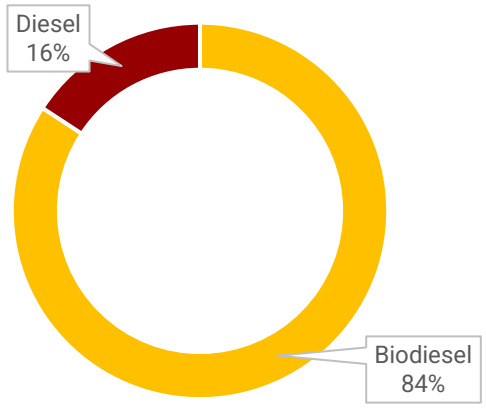
FIGURE 6-8: SCENARIO 3B (ON-ROUTE CHARGING)



6.4.1.4 Scenario 4: Lowest Capital Cost

Finally, Scenario 4 examines the lowest capital cost approach towards a fleet transition. Without constraints, it is expected that the lowest capital cost is incurred by transitioning to a biodiesel fleet. This scenario minimizes the diversity of the fuel mix and controls the capital cost at the same time. An increase in emissions is expected due to the nature of the organic material related to biodiesel, however, a reduction in lifecycle greenhouse emissions due to fuel production are lower than the current scenario. **Figure 6-9** illustrates the fuel mix.

FIGURE 6-9: SCENARIO 4



6.4.1.5 Fixed Route Fuel Mix Scenario Comparison

The following compares estimated financial profiles for each scenario as well as annual emissions outputs, and lifecycle greenhouse gas emissions incurred during the production of the fuel type. These all help to balance considerations and benefits as well as challenges related to each scenario.

The first comparison looks at the total capital cost incurred in the implementation of each vehicle type. Assumptions for these estimates were drawn from the 2023 AFLEET tool, which models capital costs for each vehicle type. The assumptions were made for the generic transit bus assumption built in the tool and considers the vehicle cost (assuming about two vehicles per block) and the cost of additional infrastructure to accommodate the introduction of new fuel types.

Described below are the assumed infrastructure needs for each scenario.

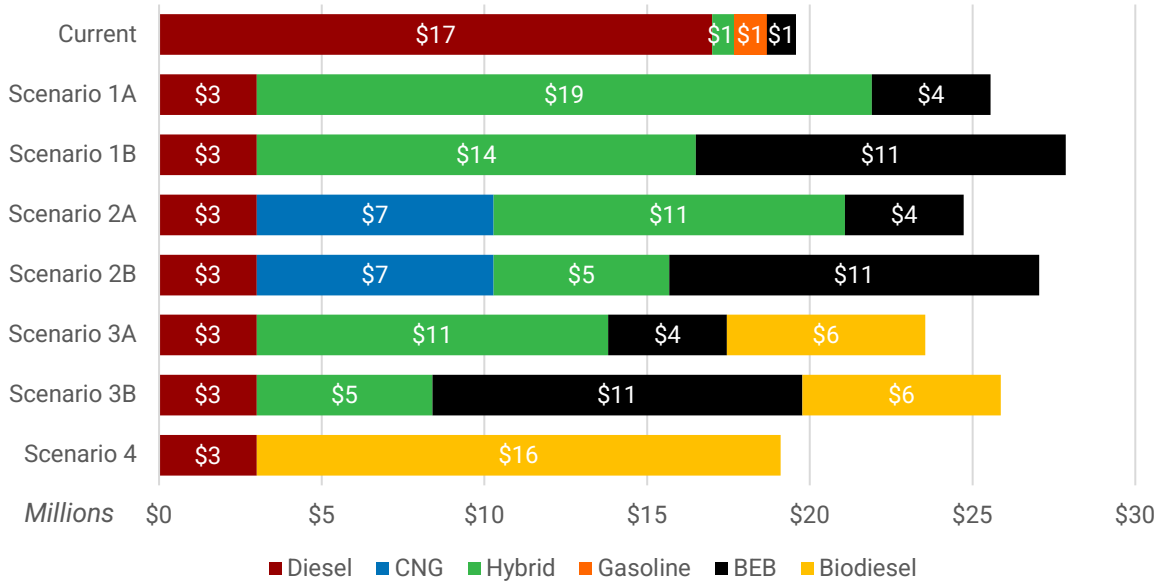
- Scenario 1A: The purchase of four Level 2 Chargers for overnight depot charging as well as the cost of installing these chargers.
- Scenario 1B: The cost of installing 12 Level 2 chargers for overnight depot charging as well as 3 fast chargers to be installed at the CAT Operations Facility, Government Center Transfer Station, and Immokalee Transfer Station, as well as the cost of installation and electrical grid upgrades.
- Scenario 2A: The purchase of four Level 2 Chargers for overnight depot charging as well as the cost of installing these chargers; and the installation of a small to medium slow-fill CNG facility, gas dryers and 12 dispensers at the depot.
- Scenario 2B: The cost of installing 12 Level 2 chargers for overnight depot charging as well as 3 fast chargers to be installed at the CAT Operations Facility, Government Center Transfer Station, and Immokalee Transfer Station, as well as the cost of installation and electrical grid upgrades.

Also, the installation of a small to medium slow-fill CNG facility, gas dryers and 12 dispensers at the depot.

- Scenario 3A: The purchase of four Level 2 Chargers for overnight depot charging as well as the cost of installing these chargers; and the addition of a fuel storage tank for biodiesel and a few added dispensers.
- Scenario 3B: The cost of installing 12 Level 2 chargers for overnight depot charging as well as 3 fast chargers to be installed at the CAT Operations Facility, Government Center Transfer Station, and Immokalee Transfer Station, as well as the cost of installation and electrical grid upgrades. The addition of a fuel storage tank for biodiesel and a few added dispensers.
- Scenario 4: The addition of a fuel storage tank for biodiesel and a few added dispensers.

Figure 6-10 presents these estimated costs for comparison purposes.

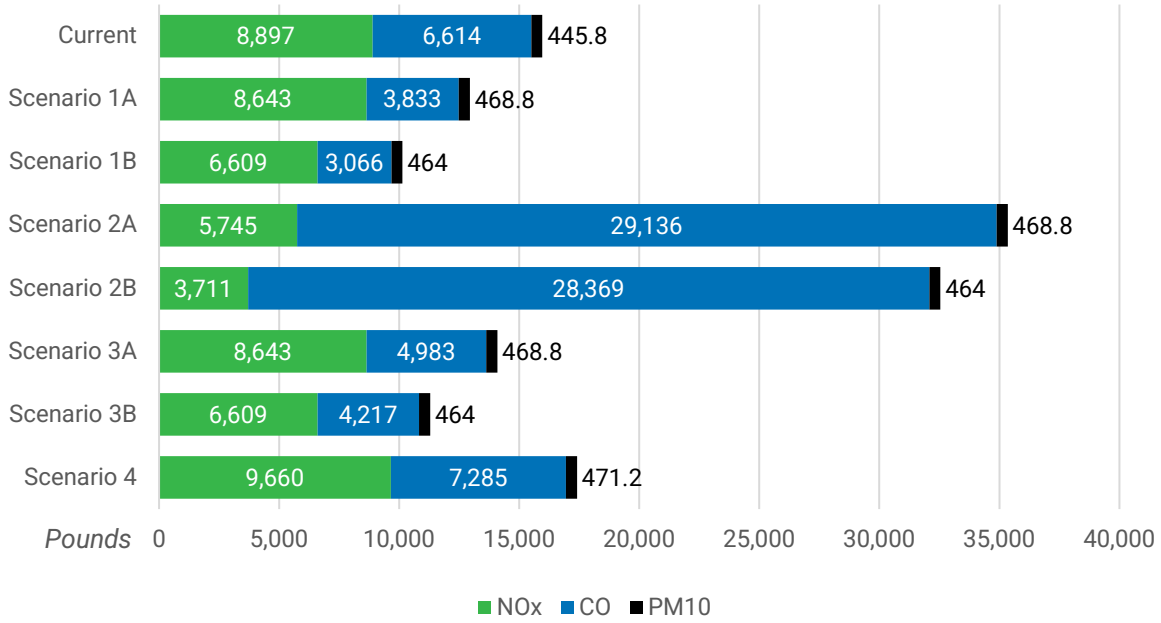
FIGURE 6-10: FIXED ROUTE ESTIMATED CAPITAL COSTS



Costs range between $18 million and $28 million, with Scenario 1B being the costliest, and Scenario 4 being the least costly, even when compared to the current scenario. Scenario 1A is the median costing approach at just over $25 million.

The estimated annual emissions output was analyzed for each scenario, varying based on the fleet's fuel mix. These figures serve as planning estimates rather than exact values. The emissions evaluated are Carbon Monoxide (CO), Nitrous Oxide (NOx), and Particulate Matter (PM10). Carbon Monoxide is found in natural and organic material in abundance and is released when incomplete fuel burning occurs. Carbon Monoxide is, however, less problematic in open air and is harmful in larger quantities when compared to NOx which can cause acid rain, smog, and ground level ozone. Moreover, NOx can cause respiratory issues and inflammation when inhaled. Finally Particulate Matter is most impactful on human health, which can be introduced into the human tissue and the bloodstream, causing severe problems including a premature death. **Figure 6-11** shows the estimated emissions profile for each scenario and should be interpreted cautiously.

FIGURE 6-11: ESTIMATED ANNUAL EMISSIONS PROFILE FOR FIXED ROUTE

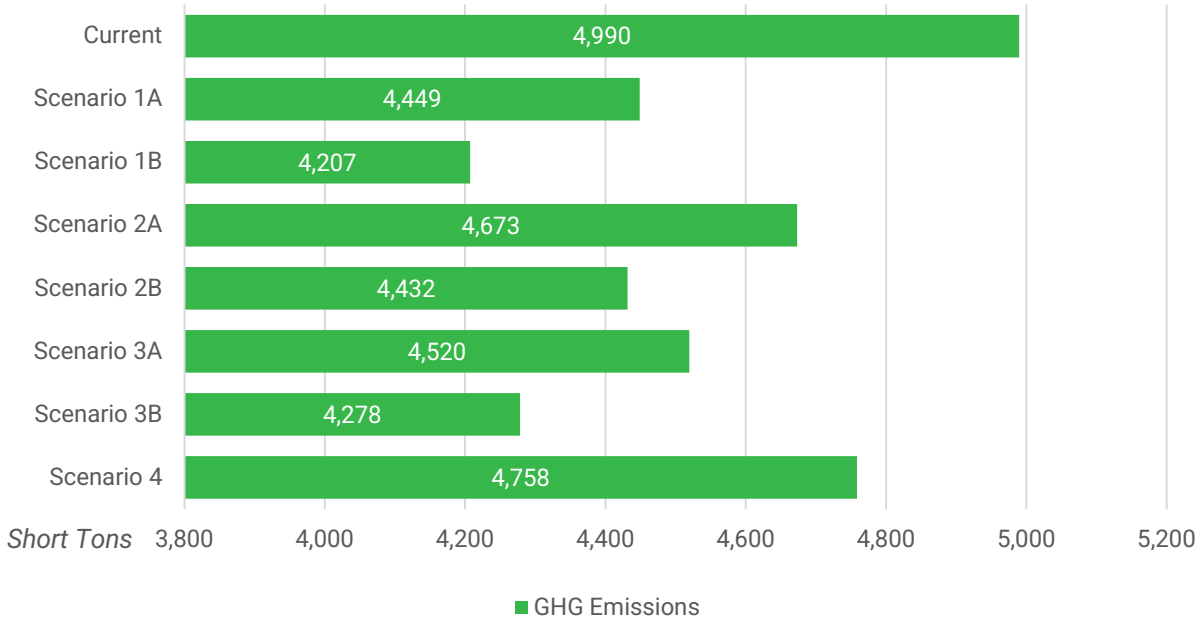


Scenarios 2A and 2B have the highest CO impact due to the release of methane and carbon monoxide from incomplete burning of natural gas in the fleet. While CO may disperse, the figures are significant. On the other hand, these scenarios also show the greatest reduction in NOx due to a large movement away from diesel. Finally, the particulate matter is standard relative to other scenarios. Scenario 1A and 1B present the lowest carbon footprint overall although the NOx profile for 1B is lower than 1A. Scenario 4 has the highest NOx emissions due to maintaining diesel fuel, and the largest particulate matter emission, being more harmful in every respect to the current scenario.

For further consideration, a well-to-wheels lifecycle analysis was also assessed. This analysis looks at the greenhouse gas emissions that are generated during the fuel production and distribution process. In the case of battery electric vehicles, this includes lithium mining for batteries, and petroleum extraction for diesel, biofuel activation for biodiesel, and natural gas extraction for CNG. **Figure 6-12** provides a comparison of the various fuel types in short tons.

The current scenario has the greatest overall impact due to the petroleum extraction process. All other scenarios present a decrease in emissions by comparison. Most notably, Scenario 1B has the lowest emission profile for fuel production, largely due to the lithium batteries, and a reduced overall use of diesel.

FIGURE 6-12: WELL TO WHEELS LIFECYCLE GREENHOUSE GAS EMISSIONS FIXED ROUTE COMPARISONS



6.4.2 Demand Response

Several possible scenarios can be considered when determining the fuel mix recommendations for the transition of the demand response fleet. None of the scenarios propose the addition of electric cutaways, as these seem to be inadequate for adoption given the current demand response fleet's operations. The first scenario is the most visionary approach, attempting to replace vehicles in a way that achieves the lowest emissions possible while accounting for operational challenges such as long DR trips out of range for certain fuel types. The second scenario mimics the first scenario but simplifies the diversification of fleet by keeping two fuel types with minimal capital investment with a commitment towards low emissions. The third scenario minimizes the impact of capital costs but commits to a soft transition towards a low emission cutaway fleet. **Table 6-28** summarizes the existing fuel mix for Demand Response vehicles and resulting mix for each of the scenarios.

TABLE 6-28: DEMAND RESPONSE FUEL MIX RECOMMENDATIONS

Vehicle Type	Current Scenario		Recommendations					
			Scenario 1: Balanced Emissions and Costs		Scenario 2: Lowest Capital Cost		Scenario 3: Strong CNG	
Diesel	25%	8	0%	0	25%	8	0%	0
Gasoline	75%	24	75%	24	0	0	0%	0
Biodiesel	0%	0	0%	0	75%	24	25%	8
CNG	0%	0	25%	8	0	0	75%	24

6.4.2.1 Scenario 1

Scenario 1 aims to balance the emissions output and capital costs. This scenario envisions maintaining 24 gasoline vehicles, which is the current composition of the gasoline fleet, and replacing diesel cutaways with CNG cutaways.

6.4.2.2 Scenario 2

Scenario 2 Aims to reduce capital costs while transitioning into a fuel alternative. This scenario maximizes the diesel fleet and applies the use of biodiesel fuel in the fleet.

6.4.2.3 Scenario 3

Scenario 3 aims to take a strong approach or investment into CNG. 75% of the demand response fleet would transition to CNG, with a selection of diesel cutaways to serve the longest trips.

6.4.2.4 Scenario Comparisons

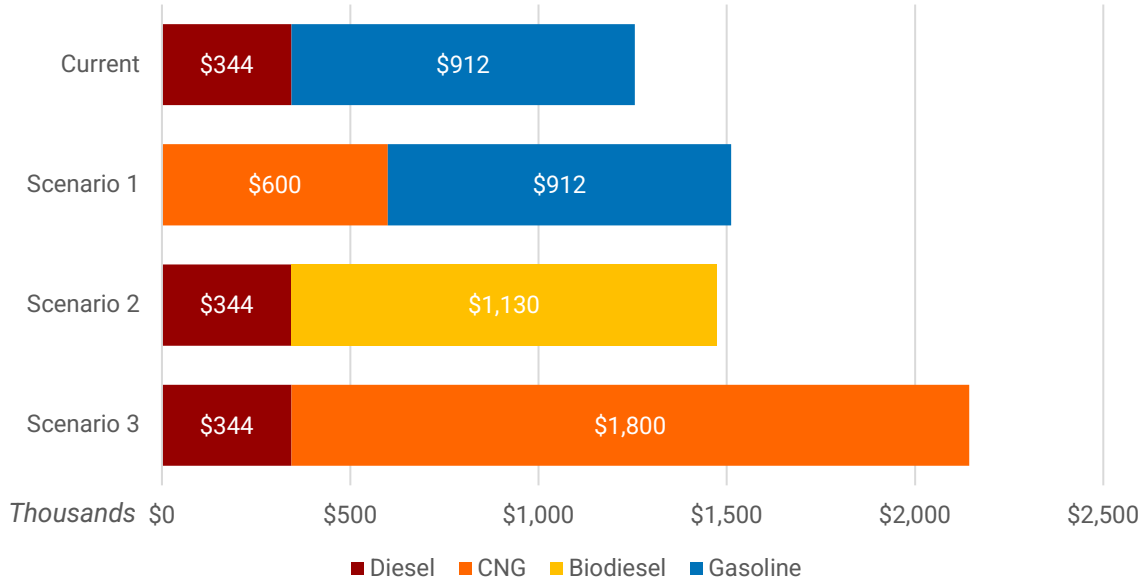
The capital costs range between $1.5 million and $2.2 million, while the current fleet cost is currently about $1.3 million. Scenario 3 is the costliest due to the added infrastructure that would be required in addition to the vehicle purchase. Scenario 2 is the least expensive, only requiring the addition of a biodiesel tank.

Assumptions regarding capital costs include:

- Scenario 1: the installation of a small CNG facility with dispensers
- Scenario 2: The purchase and installation of a biodiesel tank
- Scenario 3: The installation of a small to medium CNG facility with dispensers.

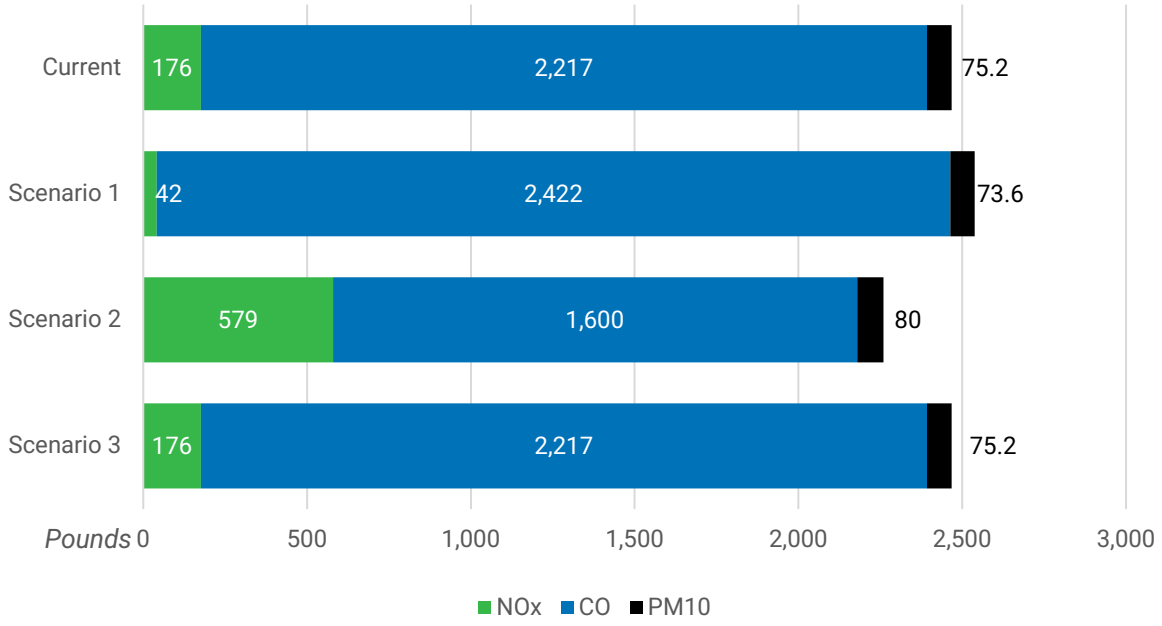
Figure 6-13 presents the capital costs for the various scenarios proposed compared to the current scenario.

FIGURE 6-13: DEMAND RESPONSE ESTIMATED CAPITAL COSTS



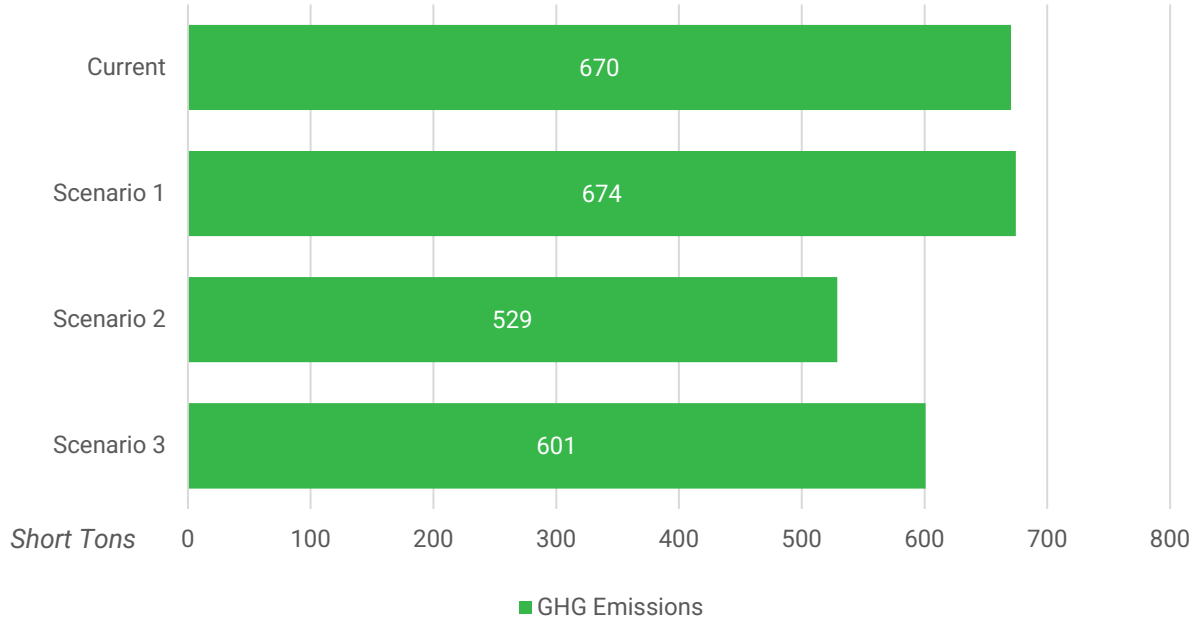
Emissions profiles were also developed for the various demand response scenarios proposed. Variation in emission output is less pronounced compared to fixed route scenarios. The largest observable change is Scenario 2's large increase in NOx and Particulate Matter emissions compared to other scenarios, even though it does achieve a reduction in CO. This could be an alarming counterintuitive approach due to its relatively higher NOx output. **Figure 6-14** presents the comparison.

FIGURE 6-14: ESTIMATED ANNUAL EMISSIONS PROFILE FOR DEMAND RESPONSE



A well to wheels emissions profile was also developed and assessed for the demand response scenarios. Scenario 2 has a clear advantage in its reduction of lifecycle emissions from the well, in this case, the production of biofuel. Meanwhile, the CNG Scenario 3 is also a clear reducer of emissions overall. **Figure 6-15** presents these profiles.

FIGURE 6-15: WELL TO WHEELS LIFECYCLE GREENHOUSE GAS EMISSIONS DEMAND RESPONSE COMPARISONS



6.4.3 Equipment/Support Vehicle

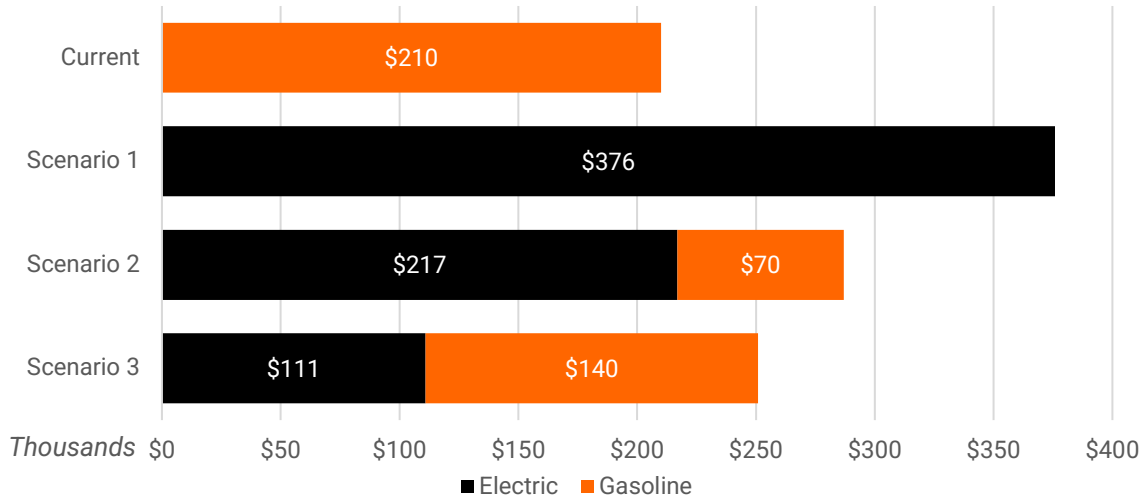
Three recommended scenarios were developed for the Equipment/Support Vehicle fleet. The first scenario commits to the lowest possible emissions, while adding an additional minivan as backup for important operator shift rides in the absence of one vehicle. The second scenario is similar to the first scenario but is cautious about the limitations in operations that can be experienced by minivans. The third scenario attempts to commit to the transition towards zero emissions while limiting the capital cost by reducing the number of EVs, as well as maintaining a cautious approach to emergency backup fleet needs during storms, maintaining enough Gasoline fueled vehicles for this scenario. **Table 6-29** summarizes the recommendations.

TABLE 6-29: SUPPORT VEHICLES FUEL MIX RECOMMENDATIONS

Vehicle Type	Current Scenario		Recommendations					
			Scenario 1: Lowest Emissions (and Lifecycle Cost)		Scenario 2: Operations Limited		Scenario 3: Lowest Capital Cost	
	Gas	EV	Gas	EV	Gas	EV	Gas	EV
Minivan	2	0	0	3	2	0	2	0
SUV	2	0	0	2	0	2	1	1
Pickup Truck	2	0	0	2	0	2	1	1

Transitioning from gasoline to electric vehicles has its cost benefits. Going full electric is currently almost $375 thousand for CATs DR fleet. However, Scenario 3 presents a balanced approach to the support vehicle fleet that is less than $50 thousand more expensive than the current scenario. **Figure 6-16** presents the cost comparisons. Cost assumptions only consider the installation of small commercial chargers for these vehicles, and no additional fuel tanks for any gasoline vehicles.

FIGURE 6-16: SUPPORT VEHICLES ESTIMATED CAPITAL COSTS



When evaluating the estimated emissions output for support vehicles, going all electric is nearly feasible and can be the first part of CATs total fleet to have a low impact overall. Adding electric vehicles is a clear step away from emissions as observable in **Figure 6-17**.

Following a similar pattern, the integration of electric vehicles reduces the overall lifecycle greenhouse gas emissions, although these are still present in all electric scenarios, likely due to lithium mining and transferring demand to local energy sources. See **Figure 6-18** for the comparisons.

FIGURE 6-17: ESTIMATED ANNUAL EMISSIONS PROFILE FOR SUPPORT VEHICLES

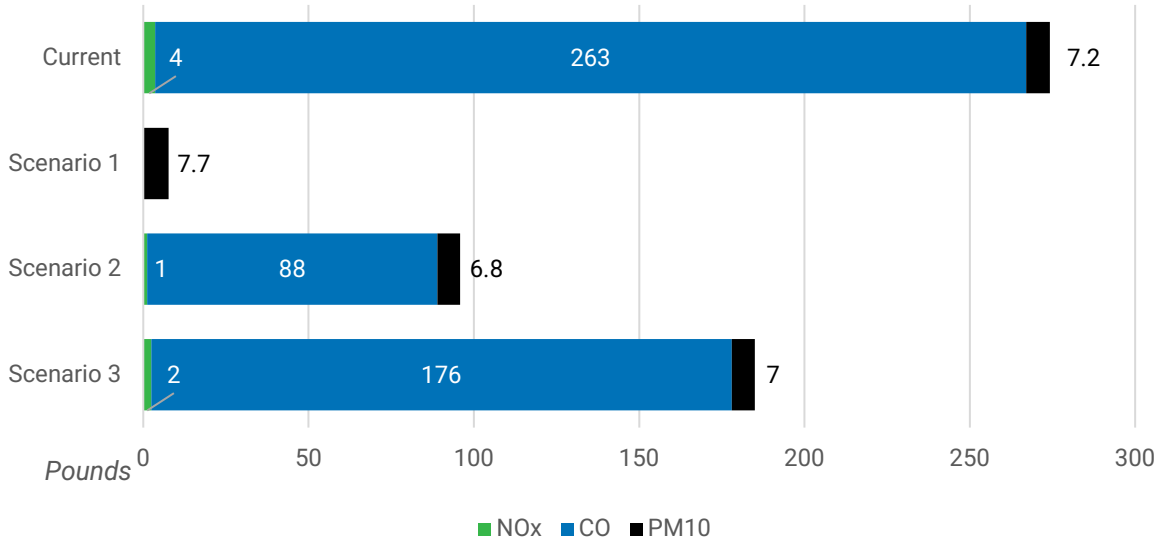
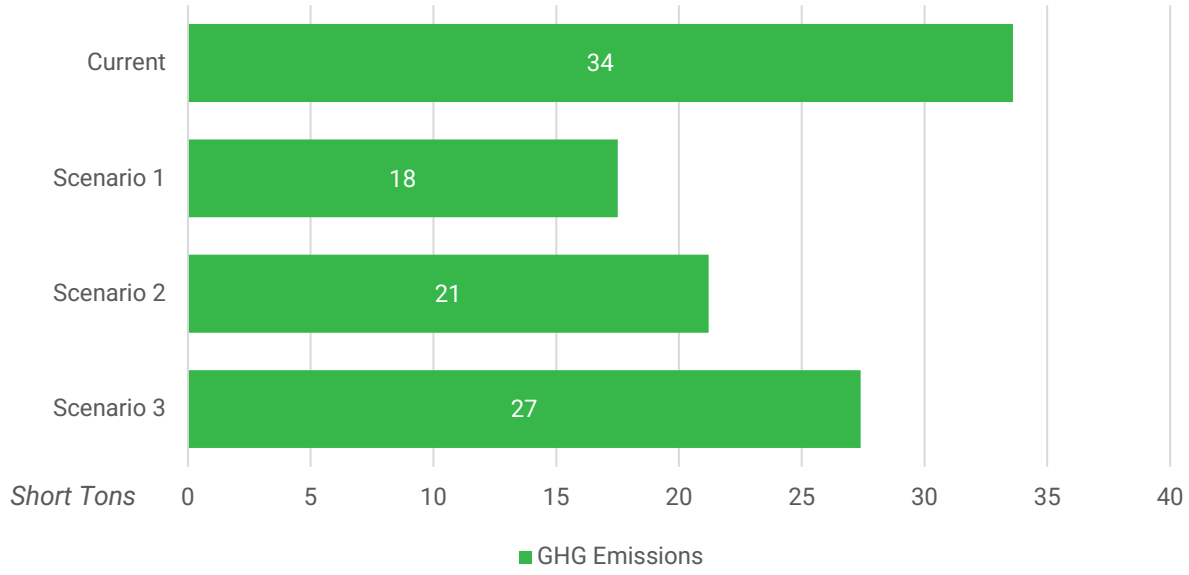


FIGURE 6-18: WELL TO WHEELS LIFECYCLE GREENHOUSE GAS EMISSIONS SUPPORT VEHICLE COMPARISONS



7 FINANCIAL ANALYSIS

Incorporating the findings from the feasibility analysis, this financial analysis examines the same fuel mix scenarios to assist in the preparation of a vehicle replacement plan for fixed-route, paratransit and support vehicles. These financial estimates, in conjunction with input from the Steering Committee, determined the percentage of vehicles desired to be transitioned to ZEV. The resulting vehicle replacement plan, included in the ZEV transition plan, covers ten years to ensure all current vehicles are replaced with the recommended technology based on the percent replacement desired.

Included in the financial analysis are high-level capital cost estimates for the recommended fleet conversion, recommended charging infrastructure, and maintenance/storage facility modifications. In addition, this section provides a review of state and federal funding sources, including FTA's Low or No Emission Grants and the Environmental Protection Agency's (EPA) Community Change Grant Program.

7.1 Financial Plan

Prior to finalizing the vehicle replacement plan and ZEV transition plan, a high-level ten-year financial plan was developed for each scenario by estimating vehicle costs and operating expenses, and assuming all other capital and operating expenses as presented in CAT's FY 2024 Transit Development Plan Annual Progress Report (TDP APR).The Argonne National Laboratory's Alternative Fuel Life-Cycle Environmental and Economic Transportation (AFLEET) tool was used to develop capital vehicle cost assumptions for this financial analysis. Additionally, a 2.51% annual inflation rate was assumed to reflect the average annual inflation rate over the past ten years, according to the Bureau of Labor Statistics. Despite these assumptions, this financial analysis does not account for confounding variables such as unforeseen maintenance expenses.

Figure 7-1 summarizes the estimated ten-year total capital expenses for CAT for each fuel mix scenario. Total capital expenses assume each scenario to differ by fleet fuel mix (and associated infrastructure expenses) while all other expenses remain constant. Scenario 4 and the status quo boast the lowest estimated capital expenses, as a fleet with predominately standard internal combustion engine (ICE) vehicles (fueled by diesel and biodiesel) is less expensive than those comprised of other ZEV's. Each of the other scenarios require an extra $5 to $14 million investment over ten years for costlier capital expenses such as battery electric vehicles and charging infrastructure.

FIGURE 7-1: TOTAL CAPITAL COSTS BY FUEL MIX SCENARIO (2025-2034)



Figure 7-2 summarizes the estimated ten-year total operating expenses for CAT by fuel mix scenario. Total operating expenses assume each scenario to differ by fleet fuel mix (and associated operating expenses) while all other expenses remain constant. Scenarios 2A and 2B boast the lowest estimated operating expenses, as these propose fleets with the lowest levels of diesel consumption, in contrast to the highest levels of diesel consumption experienced with the existing fuel mix, which is projected to cost an additional $14 million over ten years to operate when compared to Scenario 2A.

FIGURE 7-2: TOTAL OPERATING COSTS BY FUEL MIX SCENARIO (2025-2034)



Considering the sum of capital and operating expenses, **Figure 7-3** visualizes the estimated grand total cost for CAT over ten years, by fuel mix scenario. Scenarios 1A and 2A are likely to be the most affordable overall, as the fuel mix for those fleets are comprised by a limited number of battery electric vehicles, a limited number of vehicles exclusively powered by diesel, and do not require on-route charging. For an extra $6.3 million over ten years, the status quo is the most expensive scenario to operate as the predominantly ICE fleet experiences higher operating costs due to the high consumption of diesel fuel.

FIGURE 7-3: TOTAL CAPITAL AND OPERATING COSTS BY FUEL MIX SCENARIO (2025-2034)



7.1.1 Cost Savings

Each proposed fuel mix scenario presents a either a slight increase or a slight decrease in cost savings when compared to the status quo, with an estimated net difference between $-3 and $4 million over ten years depending on the scenario, as indicated in **Table 7-1**. Despite potential savings or increased costs of over a million dollars, each fuel mix scenario offers only differs in cost by a rate of no more than two percent when compared to status quo, depending on the scenario.

Scenario 1A presents the greatest potential cost savings because of its relatively low amounts of capital investment and low amounts of operating expenses associated with a fixed-route fleet with many hybrid vehicles and a demand response fleet with many gasoline vehicles. On the other end of the spectrum, Scenario 2B represents the greatest cost increase due to its high amounts of capital investment required for on-route charging, CNG, vehicles, and battery electric vehicles.

TABLE 7-1: SUMMARY OF COST SAVINGS BY SCENARIO

Scenario	Fuel Mix Scenario	Est. Cost Savings	Percent Savings
1A	Least Harmful Emissions (**No** On-Route Charging)	**$4.3 Million**	2.0%
1B	Least Harmful Emissions (On-Route Charging)	**$0.3 Million**	0.1%
2A	Optimized Vehicle Function (**No** On-Route Charging)	**$-0.7 Million**	-0.3%
2B	Optimized Vehicle Function (On-Route Charging)	**$-3.3 Million**	-1.5%
3A	Balanced Approach (**No** On-Route Charging)	**$1.1 Million**	0.5%
3B	Balanced Approach (On-Route Charging)	**$-1.1 Million**	-0.5%
4	Lowest Capital Cost	**$2.3 Million**	1.1%
Existing Service		$0	0.0%

7.1.2 Vehicles

Listed below are the vehicle cost assumption made for the financial analysis by fuel type. **Table 7-2** documents the assumed capital costs of vehicles and

Table 7-3 documents the assumed operating costs of vehicles.

TABLE 7-2: ASSUMED CAPITAL COSTS OF VEHICLES BY FUEL TYPE (AFLEET TOOL, 2023)

Service Type	Fuel Type	Vehicle Cost
Fixed Route	CNG	$704,000
	Battery Electric	$1,058,000
	Biodiesel	$580,000
	Hybrid	$783,000
	Diesel	$580,000
	Gasoline	$580,000
Demand Response	CNG	$316,000
	Battery Electric	$282,000
	Biodiesel	$181,000
	Diesel	$181,000
	Gasoline	$160,000
Equipment/Support Vehicles	Battery Electric	$74,000
	Gasoline	$45,000

Source: AFLEET Tool Per Unit Cost Assumptions (2023)

TABLE 7-3: ASSUMED OPERATING COSTS OF VEHICLES BY FUEL TYPE*

Service Type	Fuel Type	Cost per Mile
Fixed Route	CNG	$3.18
	Battery Electric	$3.26
	Biodiesel	$3.49
	Hybrid	$2.79
	Diesel	$3.96
	Gasoline	$3.96
Demand Response	CNG	$3.46
	Battery Electric	$2.86
	Biodiesel	$3.91
	Diesel	$3.91
	Gasoline	$3.91
Equipment/Support Van/SUV	Battery Electric	$0.10
	Gasoline	$0.33
Equipment/Support Pickup Truck	Battery Electric	$0.11
	Gasoline	$0.39

**Sources for assumptions include the National Transit Database (2023), FTA/King Co. (2017), HART (2017), King Co. (2018), NREL (2019), FTA/HART/NREL, FTA/King Co., Mountain Line ZEB Plan (2020), Transfort ZEB Plan, ICF 2019 Report (Table II-11), DOE, NREL, and the 2023 Federal Fleet Report*

7.1.3 Infrastructure/Facility Upgrades

Rolled into the overall capital costs estimates for the purpose of this financial analysis, **Table 7-4** outlines infrastructure cost assumptions associated with the implementation of each fuel type.

TABLE 7-4: ASSUMED COSTS OF ALTERNATE FUEL INFRASTRUCTURE (AFLEET, 2023)

Service Type	Infrastructure Type	Per Vehicle Cost	Flat Cost
Fixed Route	CNG Station and Dispensers (Medium)	$66,660	
	Overnight Chargers (and installation)	$11,900	
	On-Route Chargers (and installation)		$163,300*
	Biodiesel Tank and Dispensers		$97,935
Demand Response	CNG Station and Dispensers (Small)	$27,700	
	Overnight Chargers (and installation)	$11,900	

**per location*
Source: 2023 AFLEET Tool

7.1.4 Cost Feasible Plan

Figure 7-4 lists the ten-year operating expenses and revenue sources from CAT's cost feasible plan and **Figure 7-5** lists the ten-year capital expenses and revenue sources from CAT's cost feasible plan. This cost feasible plan from the TDP APR was used as the framework for this financial analysis.

Per the cost feasible plan, the following funding sources contribute to CAT's revenue stream:

- Capital
  - Federal Grants 5307, 5310, 5339
  - Local Match for 5310
- Operating
  - Federal Grant 5311
  - Local Match for 5307, 5310, 5311
  - Federal Grant 5307
  - FDOT Transit Block Grant
  - Transportation Disadvantaged Funding
  - Collier County CAT Enhancements
  - FDOT Match for 5307 and 5310
  - Fare Revenue
  - Other Local Revenues

FIGURE 7-4: CAT OPERATIONS COST FEASIBLE PLAN (2025-2034)

Cost/Revenue			2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	10-Year Total
Operating			1	2	3	4	5	6	7	8	9	10	
Operating Cost													
Maintain Existing Service - Fixed Route	Existing		$9,015,510	$9,221,063	$9,431,304	$9,646,337	$9,866,274	$10,091,225	$10,321,305	$10,556,630	$10,797,322	$11,043,501	$99,990,469
Maintain Existing Service - Paratransit	Existing		$7,131,499	$7,294,098	$7,460,403	$7,630,500	$7,804,476	$7,982,418	$8,164,417	$8,350,566	$8,540,958	$8,735,692	$79,095,027
Route 22 Realigned - no cost	Route Realignment		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Route 23 Realigned plus freq 60 to 40	Route Realignment		$0	$0	$0	$0	$0	$0	$0	$0	$0	$673,469	$673,469
New Route 25 EW, no change	Route Realignment		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
New Route 25 NS, to Immokalee Rd	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$700,957	$700,957
New Route 27 EW, Immokalee to Randa	Route Realignment		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
New Route 27 NS, Collier 441 to Immok	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$1,448,282	$1,448,282
Route 121 - Add one AM and one PM	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$288,856	$288,856
Route 11 from 30 to 20 mins	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$1,155,424	$1,155,424
Route 12 from 90 to 45 mins	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$500,684	$500,684
Route 13 from 40 to 30 min	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$165,226	$165,226
Route 14 from 60 to 30 min	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$481,427	$481,427
Route 15 from 90 to 45 min	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$288,856	$288,856
Route 16 from 90 to 45 min	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$308,113	$308,113
Route 17/18 90 to 45 minutes	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$510,312	$510,312
Route 24 from 85 to 60-min	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Route 11 - Extend Hours to 10:00 PM	Increase Hours of Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$192,571	$192,571
Route 13 - Extend Hours to 10:00 PM	Increase Hours of Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$130,948	$130,948
Route 14 - Extend Hours to 10:00 PM	Increase Hours of Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$130,948	$130,948
Route 17/18 - Extend Hours to 10:00 PM	Increase Hours of Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$237,247	$237,247
Route 19/28 - Extend Hours to 10:00 PM	Increase Hours of Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$111,691	$111,691
New Island Trolley	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$1,232,452	$1,232,452
New Bayshore Shuttle	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$519,941	$519,941
New Autonomous Circulator	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$392,844	$392,844
New Naples Pier Electric Shuttle	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$616,226	$616,226
Mobility on Demand - Golden Gate	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$736,410	$736,410
Mobility on Demand - North Naples	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$368,205	$368,205
Mobility on Demand - Naples	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$873,571	$873,571
Mobility on Demand - Marco Island	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$490,705	$490,705
Total Operating Costs			**$16,147,009**	**$16,515,161**	**$16,891,707**	**$17,276,837**	**$17,670,749**	**$18,073,642**	**$18,485,721**	**$18,907,196**	**$19,338,280**	**$32,334,557**	**$191,640,860**
Operating Revenues													
Federal Grant 5311	Existing	Federal	$800,153	$818,397	$837,056	$856,141	$875,661	$895,626	$916,047	$936,933	$958,295	$980,144	$8,874,454
Local Match (5311)	Existing	Local	$800,153	$818,397	$837,056	$856,141	$875,661	$895,626	$916,047	$936,933	$958,295	$980,144	$8,874,454
Federal Grant 5307 Operating Assistanc	Existing	Federal	$1,808,252	$1,849,480	$1,891,648	$1,934,777	$1,978,890	$2,024,009	$2,070,157	$2,117,356	$2,165,632	$2,215,008	$20,055,209
Local Match (5307)	Existing	Local	$1,808,252	$1,849,480	$1,891,648	$1,934,777	$1,978,890	$2,024,009	$2,070,157	$2,117,356	$2,165,632	$2,215,008	$20,055,209
Federal Grant 5307 ADA and Preventati	Existing	Federal	$965,946	$987,969	$1,010,495	$1,033,534	$1,057,099	$1,081,201	$1,105,852	$1,131,065	$1,156,854	$1,183,230	$10,713,243
FDOT Transit Block Grant Operating Ass	Existing	State	$1,194,529	$1,221,764	$1,249,620	$1,278,112	$1,307,253	$1,337,058	$1,367,543	$1,398,723	$1,430,614	$1,463,232	$13,248,447
TD Funding	Existing	State	$737,630	$754,448	$771,649	$789,243	$807,237	$825,642	$844,467	$863,721	$883,414	$903,556	$8,181,006
Local Match for FDOT Transit Block Gran	Existing	Local	$1,194,529	$1,221,764	$1,249,620	$1,278,112	$1,307,253	$1,337,058	$1,367,543	$1,398,723	$1,430,614	$1,463,232	$13,248,447
Local TD Funding	Existing	Local	$73,763	$75,445	$77,165	$78,924	$80,724	$82,564	$84,447	$86,372	$88,341	$90,356	$818,101
Collier County CAT Enhancements	Existing	Local	$4,631,560	$4,737,160	$4,845,167	$4,955,637	$5,068,626	$5,184,190	$5,302,390	$5,423,284	$5,546,935	$5,673,405	$51,368,356
Federal Grant 5307 -PM	New	Federal	$1,008,555	$1,031,550	$1,055,069	$1,079,125	$1,103,729	$1,128,894	$1,154,633	$1,180,958	$1,207,884	$1,235,424	$11,185,822
FDOT Match for Federal 5307 and 5310 -	New	State	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Local Match for Federal 5307 and 5310 -	New	Local	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Existing Paratransit Fare Revenue	Existing	Local	$192,157	$196,538	$201,019	$205,603	$210,290	$215,085	$219,989	$225,005	$230,135	$235,382	$2,131,204
Fare Revenue from New/Improved Ser	New	Fare	$0	$0	$0	$0	$0	$0	$0	$0	$0	$808,438	$808,438
Fare Revenue from Existing Services	Existing	Fare	$931,530	$952,769	$974,492	$996,710	$1,019,435	$1,042,678	$1,066,452	$1,090,767	$1,115,635	$1,141,072	$10,331,540
Other Local Revenues	Existing	Other Local Sources	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Additional Local Revenue Required - N	New	Other Local Sources	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Total Operating Revenue			**$16,147,009**	**$16,515,161**	**$16,891,706**	**$17,276,837**	**$17,670,749**	**$18,073,642**	**$18,485,721**	**$18,907,196**	**$19,338,280**	**$20,587,632**	$171,190,227
Annual Revenues Minus Costs			**($0)**	**($0)**	**($0)**	**($0)**	**($0)**	**($0)**	**($0)**	**($0)**	**($0)**	**($11,746,925)**	**($11,746,927)**

FIGURE 7-5: CAT CAPITAL COST FEASIBLE PLAN (2025-2034)

Cost/Revenue			2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	10-Year Total
Capital Costs													
Vehicles			**$2,434,517**	**$1,871,811**	**$4,759,875**	**$2,497,076**	**$1,396,437**	**$977,241**	**$2,879,823**	**$4,030,267**	**$381,881**	**$1,778,313**	**$25,410,250**
Replacement Fixed Route Buses - Maintain Existing Service			$554,063	$1,133,390	$4,057,311	$1,778,493	$606,348	$0	$0	$3,243,873	$1	$606,348	$14,954,612
Replacement Vans - Maintain Existing Paratransit Services			$1,678,977	$686,903	$702,565	$718,583	$734,967	$751,724	$1,922,158	$786,393	$4	$734,967	$8,888,891
Replacement of Support Vehicles			$201,477	$51,518	$0	$0	$55,123	$225,517	$57,665	$0	$1	$55,123	$666,746
Preventative Maintenance			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Route 23 Realigned plus freq 60 to 40			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Increase Frequency on Routes 24 and 121			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
										$0	$0	$0	$0
New Island Trolley			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
New Bayshore Shuttle			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
New Autonomous Circulator			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
New Naples Pier Electric Shuttle			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
MOD Service Zones (expanded microtransit)			$0	$0	$0	$0	$0	$0	$0	$0	$381,875	$381,876	$0
Spares for New Service and Improved Existing Service			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Spares for MOD Services			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
ADA Service for New Fixed Route Hours			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Other Capital/Infrastructure			**$2,533,377**	**$5,570,538**	**$13,557,976**	**$570,698**	**$583,710**	**$597,019**	**$610,631**	**$624,553**	**$638,793**	**$653,357**	**$28,035,135**
Shelter Rehab			$40,912	$41,845	$42,799	$43,775	$44,773	$45,794	$46,838	$47,906	$48,998	$50,115	$429,235
Facility			$2,000,000	$5,000,000	$13,000,000								$22,334,797
Bus Shelters			$492,465	$503,693	$515,177	$526,923	$538,937	$551,225	$563,793	$576,648	$589,795	$603,242	$5,221,103
Security - Driver Protection Barriers			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Technology - Avail Replacement			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Technlogy - APC			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Technology - Annunciators			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Technology - Onboard Information Media			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Technology - Farebox Replacement			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Study Santa Barbara Corridor			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$25,000
Study: Regional Service and Fares			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Study I-75 Managed Lanes Express			$0	$25,000	$0	$0	$0	$0	$0	$0	$0	$0	$25,000
Study Everglades City Vanpool			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Total Capital Costs			**$4,967,894**	**$7,442,349**	**$18,317,852**	**$3,067,774**	**$1,980,147**	**$1,574,260**	**$3,490,454**	**$4,654,820**	**$1,020,674**	**$2,431,670**	**$53,445,385**
Capital Revenues													
Federal Grant 5307 Capital Assistance	Existing	Federal	$2,920,334	$900,000	$13,920,520	$920,520	$941,508	$962,974	$984,930	$1,007,386	$1,030,355	$1,053,847	$27,888,688
Federal Grant 5339 Capital Assistance	Existing	Federal		$5,000,000	$0	$0	$0	$0	$0	$0	$0	$0	$6,000,000
Federal Grant 5339 Capital Assistance	Existing	Federal	$368,583	$376,986	$385,582	$394,373	$403,364	$412,561	$421,968	$431,588	$441,429	$451,493	$3,907,704
Federal Grant 5310 Capital Assistance	Existing	Federal	$1,511,080	$618,213	$632,308	$646,725	$661,470	$676,552	$1,729,943	$707,754	$4	$661,470	$8,000,002
Local Match 5310 Capital Assistance	Existing	Federal	$167,898	$68,690	$70,256	$71,858	$73,497	$75,172	$192,216	$78,639	$0	$73,497	$888,889
Total Capital Revenues			**$4,967,894**	**$6,963,889**	**$15,008,666**	**$2,033,476**	**$2,079,839**	**$2,127,259**	**$3,329,056**	**$2,225,368**	**$1,471,788**	**$2,240,307**	$46,685,283
Annual Revenues Minus Costs			**($0)**	**($478,460)**	**($3,309,186)**	**($1,034,299)**	**$99,692**	**$553,000**	**($161,398)**	**($2,429,452)**	**$451,114**	**($191,363)**	**($6,760,102)**

7.2 Potential Additional Funding

This section provides an overview of the grant opportunities available to fund the vehicle and infrastructure needs related to the transition plan. Match requirements vary so CAT will have to work with its governing board to identify funds to match grants received. Grant opportunities are primarily available through FTA, which has allocated greater funding for the Low- or No-Emission Vehicle Program under Section 5339(c). Other federal agencies also provide similar funding opportunities. These funding sources are summarized in **Table 7-5**. A Detailed summary of each funding program is listed in **Appendix E**.

TABLE 7-5: SUMMARY OF POTENTIAL FUNDING SOURCES FOR ZEV'S

Type	Agency	Funding Program	Funding Available	Funding Eligibility		
				Facilities	Bus Purchase	Charging Infrastructure
Federal	USDOT	Discretionary Grant Program for Charging and Fueling Infrastructure	$2.5 B (FY23)	✓	✓	✓
Federal	FHWA	Advanced Transportation and Congestion Management Technologies Deployment Program	$60 M (FY2025)	✓		✓
Federal	USDOT	Charging and Fueling Infrastructure Discretionary Grant Program	$700 M (FY25)	✓		✓
Federal	FHWA	Advanced Transportation Technologies and Innovative Mobility Deployment	$60.0 M (FY25)	✓	✓	✓
Federal	DOE	Title XVII Renewable Energy and Efficient Energy Projects Solicitation	$4.5 B	✓		✓
Federal	FTA	Low or No Emission Vehicle Program	$1.22 B (FY24)		✓	✓
Federal	FTA	Bus and Bus Facilities Formula Funds	$604 M (FY24)	✓	✓	
Federal	FTA	Accelerating Innovative Mobility	N/A	✓	✓	✓
Federal	USDOT	Rebuilding American Infrastructure with Sustainability and Equity Grants	$1.5 B (FY24)	✓		✓
Federal	EPA	Diesel Emissions Reduction Act	$92.0 M (FY24)		✓	
Federal	IRS	Alternative Fuel Infrastructure Tax Credit	N/A			✓
Federal	IRS	Alternative Fuel Infrastructure Tax Credit	30% tax credit, up to $100,000			✓
Federal	FTA	Accelerating Innovative Mobility	$10 M (FY25)			✓
State	FHWA	National Electric Vehicle Infrastructure Formula Program	$198 M (FY23)			✓
Federal	HUD	Community Development Block Grant (CDBG)	$ 3B (FY25)	✓		
State	FDOT	FDOT Transportation Alternatives Program	$80 M (FY25)	✓		✓
Federal	EDA	EDA Economic Adjustment Assistance Program	$37M (FY25)	✓		
State	DEO	Rural Infrastructure Fund	$25M (FY25)	✓		

8 IMPLEMENTATION PLAN

Transitioning the fleet to a low or zero-emission fleet may be a desired outcome, yet after evaluating the feasibility of this ideal, the key to achieving such an outcome is in a structured and phased implementation plan that balances operational feasibility, financial sustainability, and environmental impact. This section outlines the key steps, timelines, and strategies for deploying zero-emission technologies, including fleet conversion, infrastructure development, workforce training, and other considerations. By coordinating efforts with stakeholders, securing funding, and leveraging technological advancements, the implementation plan ensures a smooth and efficient transition while maintaining service reliability and performance standards. This implementation plan considers the first ten years of this transition, allowing CAT to be able to pivot in the best possible direction at the end of this first approach. A detailed vehicle replacement plan schedule for the fixed-route, demand response, and support vehicles has been included in **Appendix F**.

8.1 Vehicle Replacement Plan

The ten-year fixed route fleet management plan is based on a partial and gradual transition to a resilient fleet with a diverse fuel mix. This permits CAT to pilot low- and zero-emission vehicles with minimal investment and commitment and allow plenty of time to plan for a complete transition to low- and zero-emission fleet.

The transition commences with a pilot of a battery electric bus followed by a partial transition to multiple low-emission vehicles. At the time of writing, CAT has a total of 30 buses in its fleet of fixed route vehicles, one of which is a battery electric bus. See **Table 8-1** for CAT's fixed-route fleet details.

TABLE 8-1: CAT EXISTING FIXED ROUTE FLEET

Make	Model	Length (ft.)	Quantity
Ford	Villager 7.3L V8	30	2
Freightliner	Legacy	30	1
Gillig	G27B102N4	35	3
	G27D102N4	40	3
	G27E102N2	30	15
	G27E102N2	40	1
	(TBD— Diesel)	30	2
	(TBD— Diesel)	35	2
	(TBD— Electric)	35	1

Table 8-2 shows the fixed-route vehicle replacement plan based upon CAT's estimated vehicle retirement dates. Beyond FTA's default Useful Life Benchmark's guideline of 14 years for the acquisition and retirement of motor buses from a fleet, CAT has its own, more stringent policy on vehicle replacement: replacing its 30-foot buses every 10 years and its larger 35-foot and 40-foot buses every 12 years.

This replacement plan will gradually guide the transition to a low- and zero-emission fleet.

TABLE 8-2: CAT FIXED ROUTE VEHICLE REPLACEMENT PLAN

Year	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Number of Vehicle Replacements	5	3	5	3	2	2	0	5	4	1

Within the transition plan timeframe, 30 vehicles will be retired and replaced, maintaining a fixed route fleet size of approximately 31 vehicles. The transition plan incorporates low- and zero-emission vehicles by replacing select diesel vehicles at the end of their useful lives.

8.2 Fuel Mix

In order to achieve the desired partial transition to low- and zero-emission fleet with minimal impact on existing infrastructure and operations, a 2034 fuel mix was devised to reflect this. **Figure 8-1** depicts the fuel mix of the current CAT fixed route fleet and **Figure 8-2** depicts the fuel mix of the proposed 2034 CAT fixed route fleet. Two-thirds of the fleet will remain as diesel buses, but the proposed fleet will incorporate approximately six hybrid buses, two battery electric buses, and two gasoline trolley buses.

FIGURE 8-1: 2025 FUEL MIX

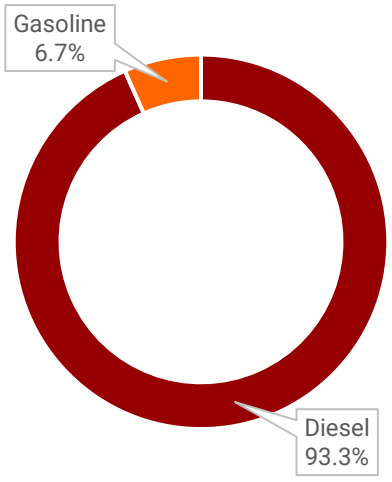
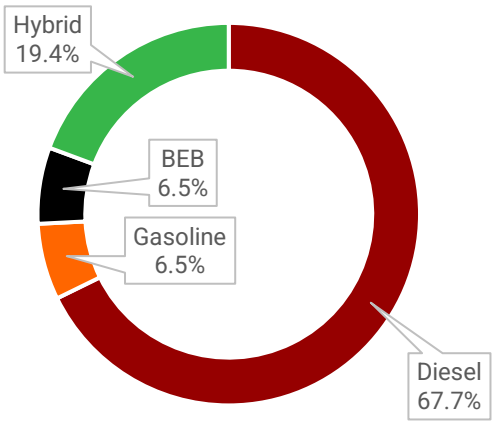


FIGURE 8-2: 2034 FUEL MIX



8.3 Phasing of Implementation

Based on the vehicle replacement plan and proposed fuel mix presented in this plan, the transition occurs in three phases. It is important to note that internal and external factors may impact the timing and details of this approach. The three main phases of the 2025-2034 transition plan are as follows:

Phase 1: 2025 – 2029 (BEB Pilot)

- Purchase and implement one battery electric bus
- Purchase and implement overnight chargers for two battery electric buses
- Evaluate the feasibility of operating and maintaining the battery electric bus
- Address and resolve any issues with the operation and maintenance of the battery electric bus

Phase 2: 2029 – 2032 (Second BEB)

- Purchase and implement an additional battery electric bus
- Revisit the ZEV Transition Plan based as part of the 2031 TDP major update vehicle replacement plan

Phase 3: 2032 – 2034 (Hybrid Pilot)

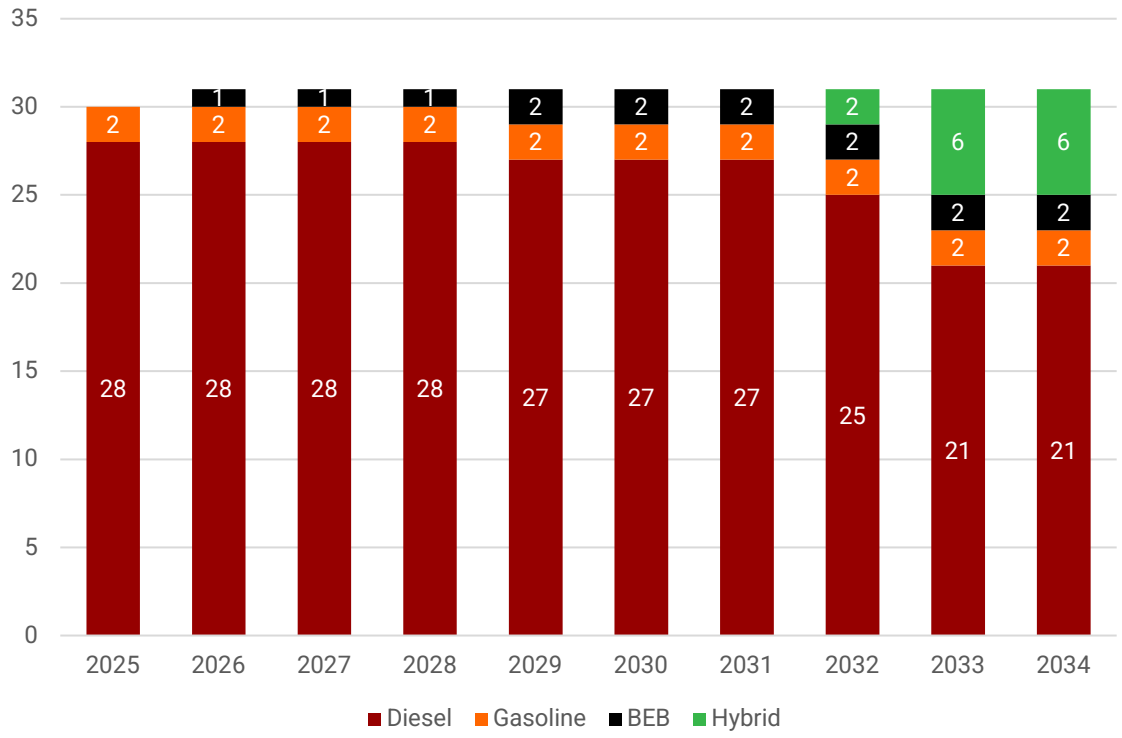
- Purchase and implement six hybrid electric buses
- Evaluate the feasibility of operating and maintaining the hybrid electric buses
- Address and resolve any issues with the operation and maintenance of the hybrid electric buses

Once Phase 3 is complete, CAT will seek to maintain the mixture of vehicle technologies or expand the fleet of low- and zero-emission vehicles. To maintain service quality, no routes will be reconfigured due to the adoption of low- and zero-emission vehicles, but service needs and shifts in transit demand may require changes to route structures.

Figure 8-3 provides an overview of the transition to low- and zero-emission vehicles in the CAT Fleet. The fleet composition transition is provided for planning purposes and reflects the aforementioned vehicle replacement plan and proposed fuel mix.

The actual replacement schedule may differ based on the availability of replacement vehicles as well as CAT's ability to secure funding. The size of the fleet may also change with the implementation of new or different types of services, therefore affecting the transition.

FIGURE 8-3: PROPOSED FIXED ROUTE FLEET COMPOSITION



To achieve the fleet composition mix shown in Figure 8-3, vehicle purchases will occur as provided in **Figure 8-4.** The ten-year plan begins in 2025, which follows the purchase of four new diesel vehicles and one new battery electric bus in 2024.

Figure 8-5 provides planning level cost projections related to the vehicle purchase plan noted in **Figure 8-4.** This implementation plan incorporates the same cost assumptions used in the financial analysis, which were derived from sources that generated estimates for average costs and may not accurately reflect each individual expense an agency may incur.

FIGURE 8-4: PROPOSED FIXED ROUTE VEHICLE PURCHASE PLAN

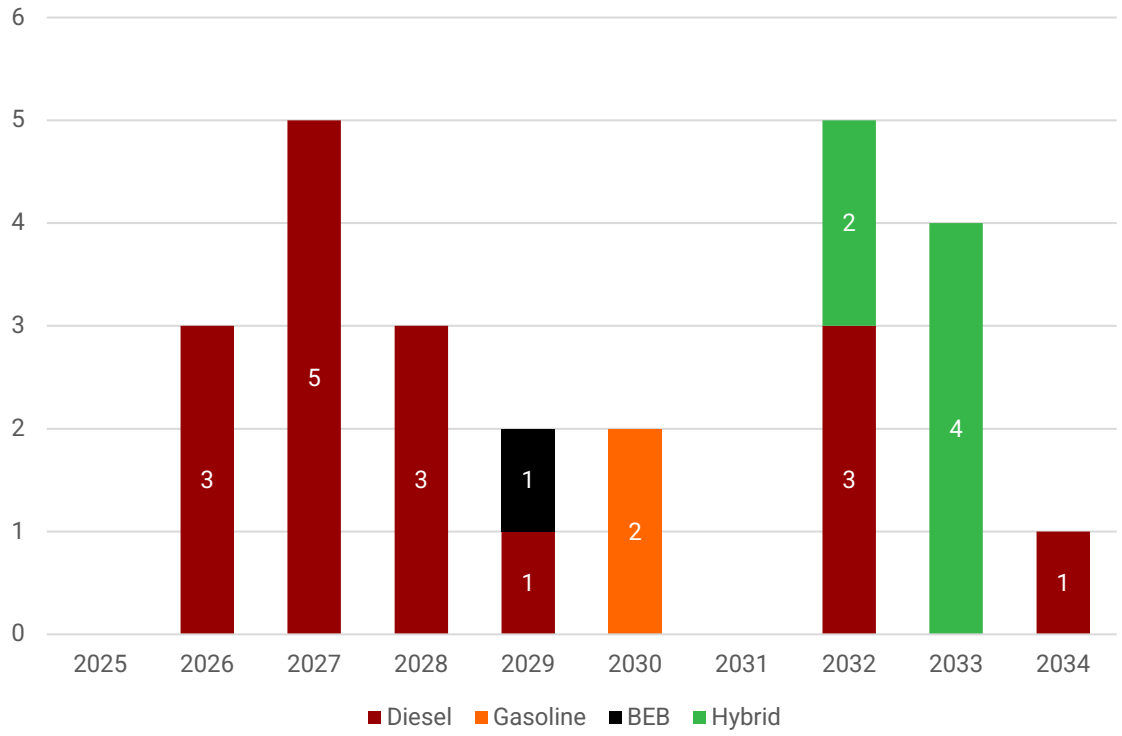
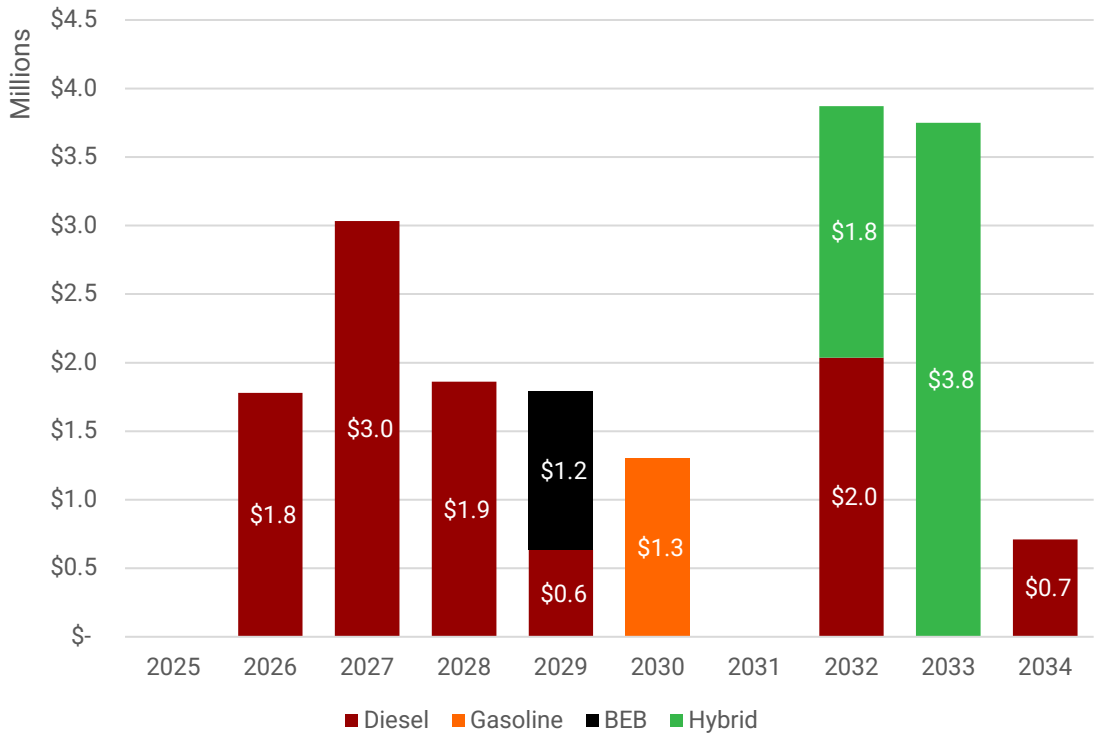


FIGURE 8-5: PROPOSED FIXED ROUTE VEHICLE EXPENSES



8.4 Paratransit and Support Vehicle Fleet Plan

CAT has not identified a suitable alternative fuel for its demand response paratransit services, which typically use cutaway vehicles. Additionally, because CAT paratransit service is carried out by a third-party operator, any changes to the vehicle technology would need to be negotiated with the operator. The agency will continue to review options, but there is no intent to transition the paratransit fleet to a low- or zero-emission technology at this time. This transition plan assumes the replacement of demand response vehicles at the end of their useful lives with vehicles of the same fuel type (diesel or gasoline).

For support vehicles, there are low- or zero-emission vehicle options to replace these vehicles. At the time of writing, CAT has six support vehicles. These vehicles include sedans, vans, and pick-up trucks. While this transition plan focuses on the fixed-route fleet transition, CAT will replace two of its retiring support vans with two battery electric sport utility vehicles (SUVs).

8.5 Financial Plan

Incorporating the CAT's operating and capital expenses and revenues as presented in **Figure 8-6** and **Figure 8-7**, the financial plan in **Figure 8-8** captures the estimated total expenses and revenue for CAT from 2025 to 2034, reflecting the low and zero-emission vehicle transition. **Figure 8-9** zeroes in on vehicle capital and operating expenses, which are the only expenses directly affected by this transition plan.

FIGURE 8-6: CAT OPERATIONS COST FEASIBLE PLAN (2025-2034)

Cost/Revenue			2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	10-Year Total
Operating			1	2	3	4	5	6	7	8	9	10	
Operating Cost													
Maintain Existing Service - Fixed Route	Existing		$9,015,510	$9,221,063	$9,431,304	$9,646,337	$9,866,274	$10,091,225	$10,321,305	$10,556,630	$10,797,322	$11,043,501	$99,990,469
Maintain Existing Service - Paratransit	Existing		$7,131,499	$7,294,098	$7,460,403	$7,630,500	$7,804,476	$7,982,418	$8,164,417	$8,350,566	$8,540,958	$8,735,692	$79,095,027
Route 22 Realigned - no cost	Route Realignment		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Route 23 Realigned plus freq 60 to 40	Route Realignment		$0	$0	$0	$0	$0	$0	$0	$0	$0	$673,469	$673,469
New Route 25 EW, no change	Route Realignment		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
New Route 25 NS, to Immokalee Rd	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$700,957	$700,957
New Route 27 EW, Immokalee to Randa	Route Realignment		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
New Route 27 NS, Collier 441 to Immok	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$1,448,282	$1,448,282
Route 121 - Add one AM and one PM	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$288,856	$288,856
Route 11 from 30 to 20 mins	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$1,155,424	$1,155,424
Route 12 from 90 to 45 mins	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$500,684	$500,684
Route 13 from 40 to 30 min	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$165,226	$165,226
Route 14 from 60 to 30 min	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$481,427	$481,427
Route 15 from 90 to 45 min	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$288,856	$288,856
Route 16 from 90 to 45 min	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$308,113	$308,113
Route 17/18 90 to 45 minutes	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$510,312	$510,312
Route 24 from 85 to 60-min	Increase Frequency		$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Route 11 - Extend Hours to 10:00 PM	Increase Hours of Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$192,571	$192,571
Route 13 - Extend Hours to 10:00 PM	Increase Hours of Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$130,948	$130,948
Route 14 - Extend Hours to 10:00 PM	Increase Hours of Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$130,948	$130,948
Route 17/18 - Extend Hours to 10:00 PM	Increase Hours of Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$237,247	$237,247
Route 19/28 - Extend Hours to 10:00 PM	Increase Hours of Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$111,691	$111,691
New Island Trolley	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$1,232,452	$1,232,452
New Bayshore Shuttle	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$519,941	$519,941
New Autonomous Circulator	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$392,844	$392,844
New Naples Pier Electric Shuttle	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$616,226	$616,226
Mobility on Demand - Golden Gate	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$736,410	$736,410
Mobility on Demand - North Naples	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$368,205	$368,205
Mobility on Demand - Naples	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$873,571	$873,571
Mobility on Demand - Marco Island	Add New Service		$0	$0	$0	$0	$0	$0	$0	$0	$0	$490,705	$490,705
Total Operating Costs			**$16,147,009**	**$16,515,161**	**$16,891,707**	**$17,276,837**	**$17,670,749**	**$18,073,642**	**$18,485,721**	**$18,907,196**	**$19,338,280**	**$32,334,557**	**$191,640,860**
Operating Revenues													
Federal Grant 5311	Existing	Federal	$800,153	$818,397	$837,056	$856,141	$875,661	$895,626	$916,047	$936,933	$958,295	$980,144	$8,874,454
Local Match (5311)	Existing	Local	$800,153	$818,397	$837,056	$856,141	$875,661	$895,626	$916,047	$936,933	$958,295	$980,144	$8,874,454
Federal Grant 5307 Operating Assistand	Existing	Federal	$1,808,252	$1,849,480	$1,891,648	$1,934,777	$1,978,890	$2,024,009	$2,070,157	$2,117,356	$2,165,632	$2,215,008	$20,055,209
Local Match (5307)	Existing	Local	$1,808,252	$1,849,480	$1,891,648	$1,934,777	$1,978,890	$2,024,009	$2,070,157	$2,117,356	$2,165,632	$2,215,008	$20,055,209
Federal Grant 5307 ADA and Preventati	Existing	Federal	$965,946	$987,969	$1,010,495	$1,033,534	$1,057,099	$1,081,201	$1,105,852	$1,131,065	$1,156,854	$1,183,230	$10,713,243
FDOT Transit Block Grant Operating Ass	Existing	State	$1,194,529	$1,221,764	$1,249,620	$1,278,112	$1,307,253	$1,337,058	$1,367,543	$1,398,723	$1,430,614	$1,463,232	$13,248,447
TD Funding	Existing	State	$737,630	$754,448	$771,649	$789,243	$807,237	$825,642	$844,467	$863,721	$883,414	$903,556	$8,181,006
Local Match for FDOT Transit Block Gran	Existing	Local	$1,194,529	$1,221,764	$1,249,620	$1,278,112	$1,307,253	$1,337,058	$1,367,543	$1,398,723	$1,430,614	$1,463,232	$13,248,447
Local TD Funding	Existing	Local	$73,763	$75,445	$77,165	$78,924	$80,724	$82,564	$84,447	$86,372	$88,341	$90,356	$818,101
Collier County CAT Enhancements	Existing	Local	$4,631,560	$4,737,160	$4,845,167	$4,955,637	$5,068,626	$5,184,190	$5,302,390	$5,423,284	$5,546,935	$5,673,405	$51,368,356
Federal Grant 5307 -PM	New	Federal	$1,008,555	$1,031,550	$1,055,069	$1,079,125	$1,103,729	$1,128,894	$1,154,633	$1,180,958	$1,207,884	$1,235,424	$11,185,822
FDOT Match for Federal 5307 and 5310 -	New	State	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Local Match for Federal 5307 and 5310 -	New	Local	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Existing Paratransit Fare Revenue	Existing	Local	$192,157	$196,538	$201,019	$205,603	$210,290	$215,085	$219,989	$225,005	$230,135	$235,382	$2,131,204
Fare Revenue from New/Improved Ser	New	Fare	$0	$0	$0	$0	$0	$0	$0	$0	$0	$808,438	$808,438
Fare Revenue from Existing Services	Existing	Fare	$931,530	$952,769	$974,492	$996,710	$1,019,435	$1,042,678	$1,066,452	$1,090,767	$1,115,635	$1,141,072	$10,331,540
Other Local Revenues	Existing	Other Local Sources	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Additional Local Revenue Required - N	New	Other Local Sources	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Total Operating Revenue			**$16,147,009**	**$16,515,161**	**$16,891,706**	**$17,276,837**	**$17,670,749**	**$18,073,642**	**$18,485,721**	**$18,907,196**	**$19,338,280**	**$20,587,632**	$171,190,227
Annual Revenues Minus Costs			**($0)**	**($0)**	**($0)**	**($0)**	**($0)**	**($0)**	**($0)**	**($0)**	**($0)**	**($11,746,925)**	**($11,746,927)**

FIGURE 8-7: CAT CAPITAL COST FEASIBLE PLAN (2025-2034)

Cost/Revenue			2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	10-Year Total
Capital Costs													
Vehicles			**$2,434,517**	**$1,871,811**	**$4,759,875**	**$2,497,076**	**$1,396,437**	**$977,241**	**$2,879,823**	**$4,030,267**	**$381,881**	**$1,778,313**	**$25,410,250**
Replacement Fixed Route Buses - Maintain Existing Service			$554,063	$1,133,390	$4,057,311	$1,778,493	$606,348	$0	$0	$3,243,873	$1	$606,348	$14,954,612
Replacement Vans - Maintain Existing Paratransit Services			$1,678,977	$686,903	$702,565	$718,583	$734,967	$751,724	$1,922,158	$786,393	$4	$734,967	$8,888,891
Replacement of Support Vehicles			$201,477	$51,518	$0	$0	$55,123	$225,517	$57,665	$0	$1	$55,123	$666,746
Preventative Maintenance			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Route 23 Realigned plus freq 60 to 40			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Increase Frequency on Routes 24 and 121			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
										$0	$0	$0	$0
New Island Trolley			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
New Bayshore Shuttle			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
New Autonomous Circulator			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
New Naples Pier Electric Shuttle			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
MOD Service Zones (expanded microtransit)			$0	$0	$0	$0	$0	$0	$0	$0	$381,875	$381,876	$0
Spares for New Service and Improved Existing Service			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Spares for MOD Services			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
ADA Service for New Fixed Route Hours			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Other Capital/Infrastructure			**$2,533,377**	**$5,570,538**	**$13,557,976**	**$570,698**	**$583,710**	**$597,019**	**$610,631**	**$624,553**	**$638,793**	**$653,357**	**$28,035,135**
Shelter Rehab			$40,912	$41,845	$42,799	$43,775	$44,773	$45,794	$46,838	$47,906	$48,998	$50,115	$429,235
Facility			$2,000,000	$5,000,000	$13,000,000								$22,334,797
Bus Shelters			$492,465	$503,693	$515,177	$526,923	$538,937	$551,225	$563,793	$576,648	$589,795	$603,242	$5,221,103
Security - Driver Protection Barriers			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Technology - Avail Replacement			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Technlogy - APC			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Technology - Annunciators			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Technology - Onboard Information Media			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Technology - Farebox Replacement			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Study Santa Barbara Corridor			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$25,000
Study: Regional Service and Fares			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Study I-75 Managed Lanes Express			$0	$25,000	$0	$0	$0	$0	$0	$0	$0	$0	$25,000
Study Everglades City Vanpool			$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Total Capital Costs			**$4,967,894**	**$7,442,349**	**$18,317,852**	**$3,067,774**	**$1,980,147**	**$1,574,260**	**$3,490,454**	**$4,654,820**	**$1,020,674**	**$2,431,670**	**$53,445,385**
Capital Revenues													
Federal Grant 5307 Capital Assistance	Existing	Federal	$2,920,334	$900,000	$13,920,520	$920,520	$941,508	$962,974	$984,930	$1,007,386	$1,030,355	$1,053,847	$27,888,688
Federal Grant 5339 Capital Assistance	Existing	Federal		$5,000,000	$0	$0	$0	$0	$0	$0	$0	$0	$6,000,000
Federal Grant 5339 Capital Assistance	Existing	Federal	$368,583	$376,986	$385,582	$394,373	$403,364	$412,561	$421,968	$431,588	$441,429	$451,493	$3,907,704
Federal Grant 5310 Capital Assistance	Existing	Federal	$1,511,080	$618,213	$632,308	$646,725	$661,470	$676,552	$1,729,943	$707,754	$4	$661,470	$8,000,002
Local Match 5310 Capital Assistance	Existing	Federal	$167,898	$68,690	$70,256	$71,858	$73,497	$75,172	$192,216	$78,639	$0	$73,497	$888,889
Total Capital Revenues			**$4,967,894**	**$6,963,889**	**$15,008,666**	**$2,033,476**	**$2,079,839**	**$2,127,259**	**$3,329,056**	**$2,225,368**	**$1,471,788**	**$2,240,307**	$46,685,283
Annual Revenues Minus Costs			**($0)**	**($478,460)**	**($3,309,186)**	**($1,034,299)**	**$99,692**	**$553,000**	**($161,398)**	**($2,429,452)**	**$451,114**	**($191,363)**	**($6,760,102)**

FIGURE 8-8: PROPOSED CAT FINANCIAL PLAN

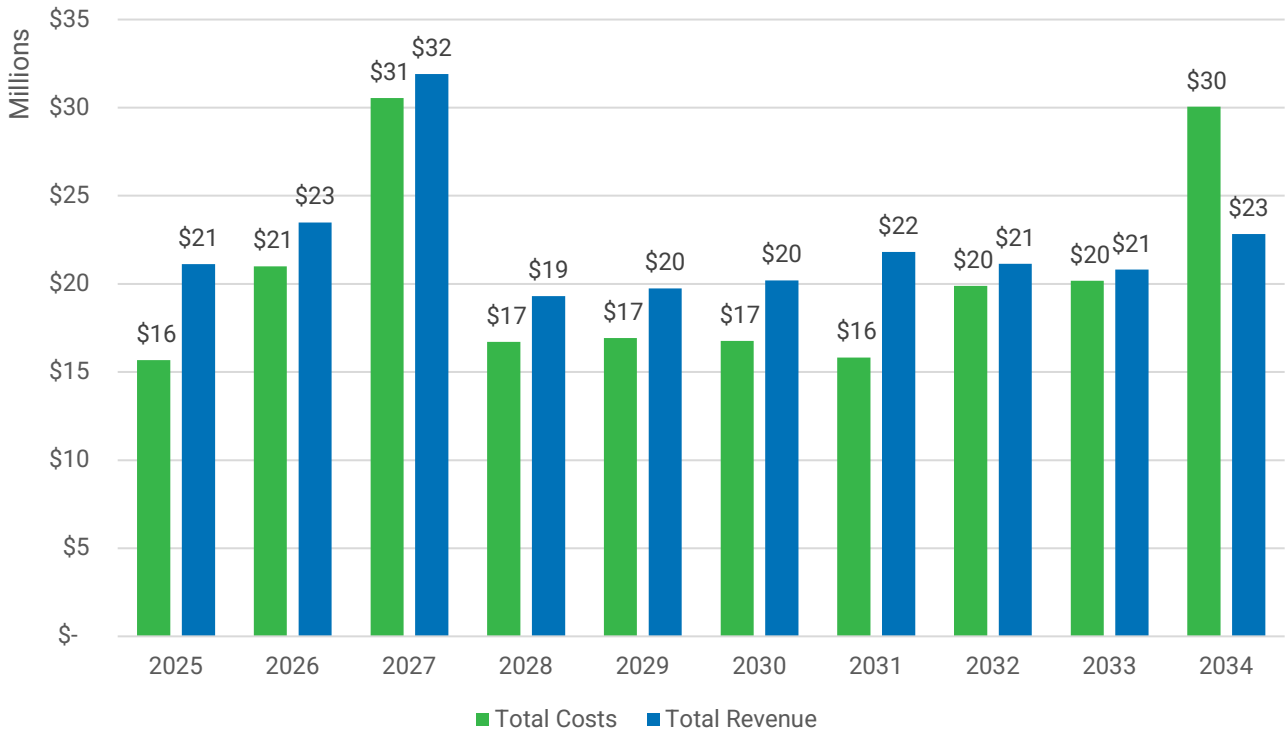
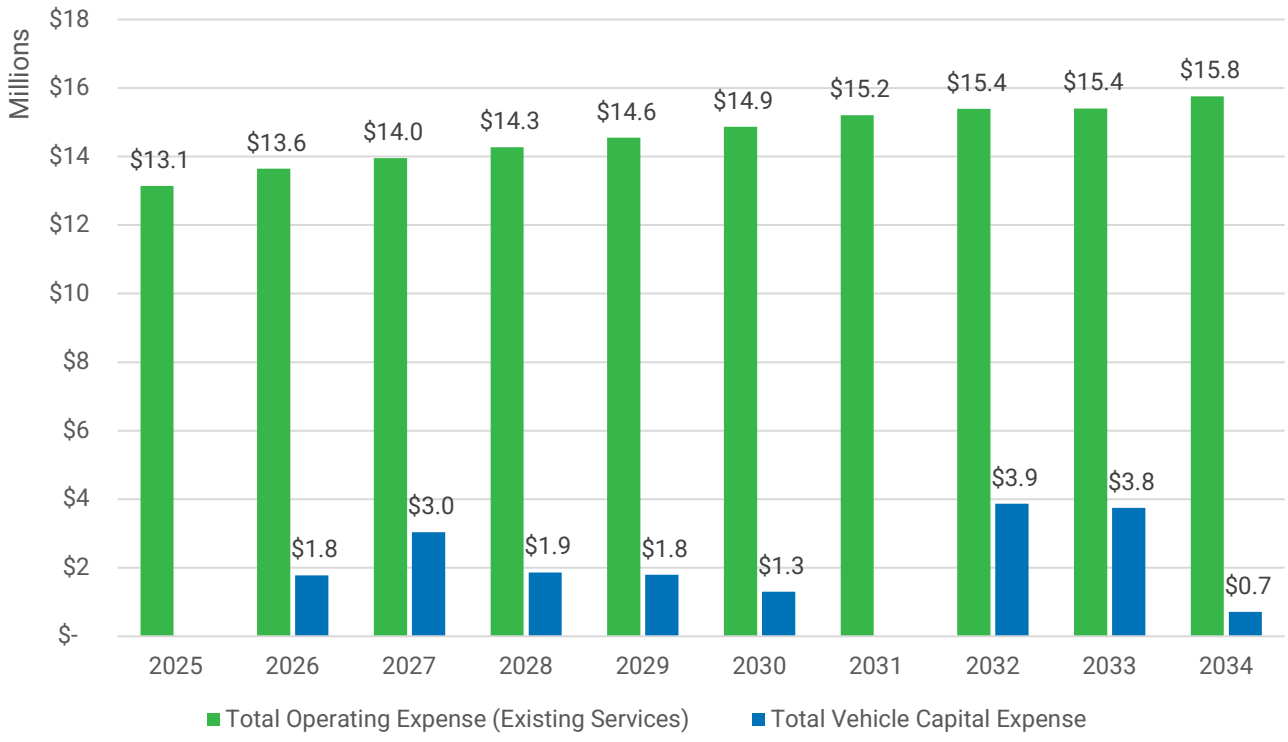


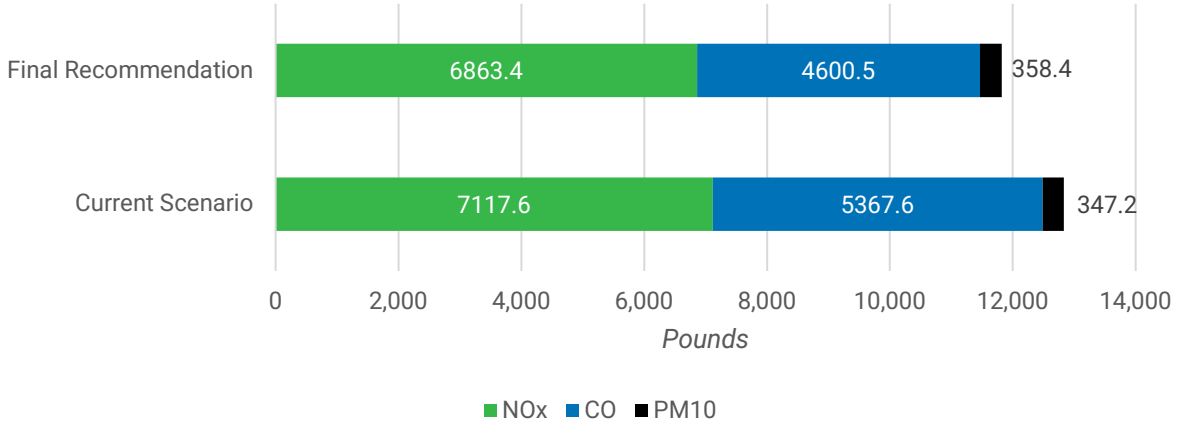
FIGURE 8-9: CAT ZEV 2025-2034 TRANSITION PLAN TOTAL FIXED ROUTE VEHICLE CAPITAL AND OPERATING EXPENSES



8.6 Emissions Reduction

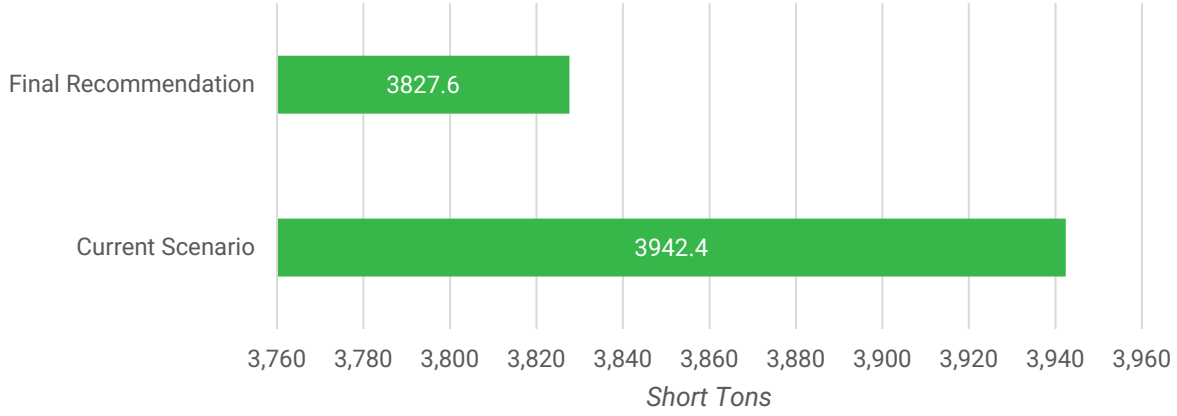
Based on the final transition approach, the following emissions profiles were estimated to understand what the overall emissions would look like compared to the current scenario. Emissions profile is based on previously described emission references found in Section 6.4.1.5 regarding NOx, CO, and PM10. **Figure 8-10** compares the reduction in pounds of annual emissions output for fixed route vehicles in the current scenario and in the transition scenario. **Figure 8-11** compares the reduction in short tons of lifecycle greenhouse gas (GHG) emissions for fixed route vehicles in the current scenario and in the transition scenario.

FIGURE 8-10: ANNUAL EMISSIONS PROFILE COMPARISON FOR THE FINAL RECOMMENDATION OF FIXED ROUTE VEHICLES



It is expected that a net annual reduction of about 1,000 pounds of harmful emissions will be experienced as a result of the current transition over the fixed route fleet.

FIGURE 8-11: WELL TO WHEELS LIFECYCLE GREENHOUS GAS COMPARISON FOR THE FINAL RECOMMENDATION OF FIXED ROUTE VEHICLES

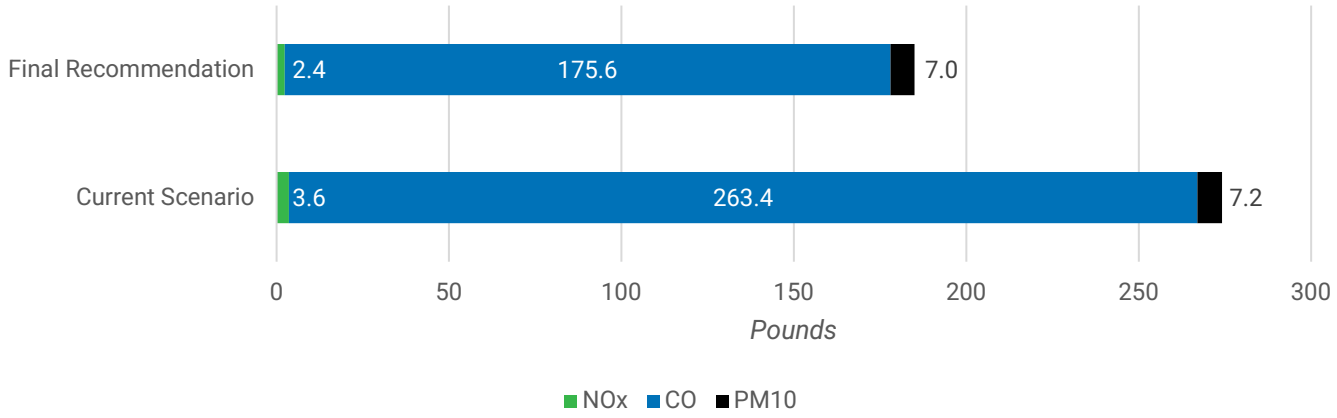


It is expected that a reduction of about 114 short tons of greenhouse gas emissions will be saved over the lifecycle of the fixed route fleet as a result of the current transition.

Since no demand response vehicles are planned for transition in this plan, no comparison in emissions reduction is presented. It is estimated that the output of harmful emissions from the demand response fleet is about 2,560 pounds annually, while the total lifecycle greenhouse gas emissions for this fleet is estimated at almost 700 short tons.

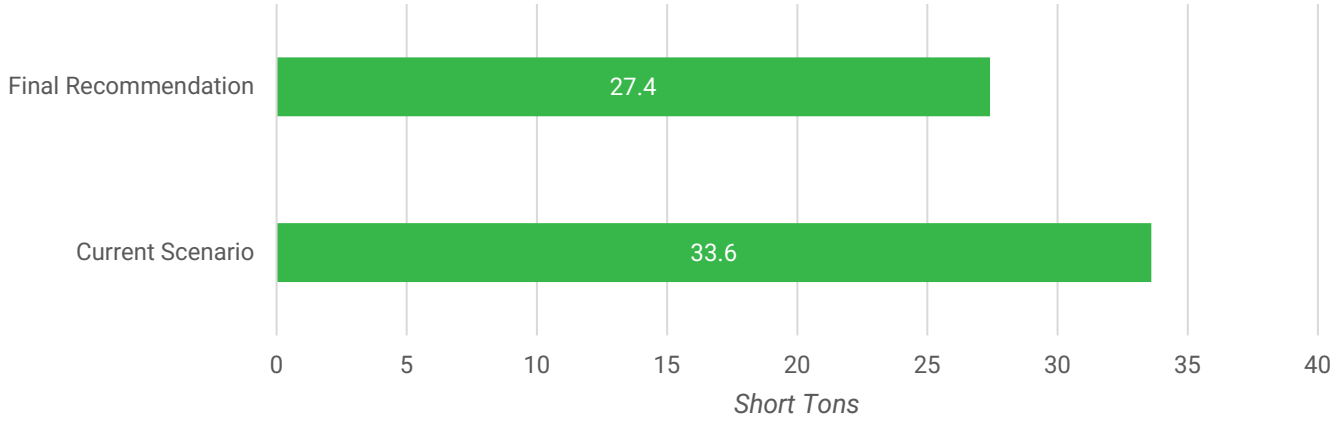
Figure 8-12 compares the reduction in pounds of annual emissions output for support vehicles in the current scenario and in the transition scenario. **Figure 8-13** compares the reduction in short tons of lifecycle greenhouse gas (GHG) emissions for support vehicles in the current scenario and in the transition scenario.

FIGURE 8-12: ANNUAL EMISSIONS PROFILE COMPARISON FOR THE FINAL RECOMMENDATION OF SUPPORT VEHICLES



It is expected that a net annual reduction of about 90 pounds of harmful emissions will be experienced as a result of the current transition over the support vehicle fleet.

FIGURE 8-13: WELL TO WHEELS LIFECYCLE GREENHOUS GAS COMPARISON FOR THE FINAL RECOMMENDATION OF SUPPORT VEHICLES



It is expected that a reduction of about 6 short tons of greenhouse gas emissions will be saved over the lifecycle of the support vehicle fleet as a result of the current transition.

In total, it is expected that the current transition will amount to a decrease in harmful emissions of about 1,100 pounds annually, and about 120 short tons of greenhouse gas emissions over the lifecycle of CAT's entire fleet.

8.7 Facilities Recommendations

A review of CAT's Operations Facility was undertaken to understand what a low- and zero-emission transition would require and how it would be physically implemented at CAT's various facilities.

The Operations Facility, located on Radio Road, will be undergoing a facility reconfiguration in the near future which will replace the maintenance building. At approximately 8 acres, this facility currently houses the full fleet, administration, operations, and maintenance functions. Considerations for the new maintenance facility include added space for the inclusion of spare parts for electric vehicles. It is expected that the reconfiguration will provide for a total of 40 bus parking spots, two of which have been explicitly identified for electric charging capabilities. These spots are located at an adequate distance from the fueling depot. It is recommended that CAT look into the possibility of an additional ten spots beyond these two that could be transformed into electric charging spots if necessary. The facility is otherwise limited to the expansion of additional electric bus charging spots. Fast charging would best be recommended under the canopy structure where buses stop during layovers. The inclusion of a CNG fueling station would be challenging under the new configuration and should only be considered if CNG becomes a viable option for this facility. Based on the future configuration, CNG would best be delivered to the facility for on-site dispensing. The inclusion of biodiesel would require installing an additional fuel storage tank near the fueling depot and reconfiguring the dispensers. This would not be an intensive reconfiguration of the facility area.

8.8 Workforce Training Considerations

As CAT shifts toward an alternative fuel future, workforce training will be essential to ensure a smooth and timely transition. The training requirements will differ based on each position and current skill level.

By following the prompts from FTA's *Workforce Evaluation Tool*, CAT maintenance and administration staff can strategically assess the impact of the transition to low- and zero-emission technologies on the current workforce. The following information outlines the findings and conclusions derived from using the tool.

First, the training needs for various CAT employee groups were identified.

- **Training Instructors** | CAT will employ a train-the-trainer approach to ensure all technicians and maintenance employees receive the training that they need. Technicians who provide training to other Breeze technicians will require training related to all aspects of the new skills required for the individuals that they train.
- **Mechanics and Technicians** | Identified through the agency interviews as the group with the most impact on a low- and zero-emission transition's success, the speed with which these staff members adapt to working with the new technologies is critical. Their transition impacts the speed with which vehicles are returned to revenue service. For these reasons, the most intensive training needs will be related to the mechanic and technician staff.

At present, none of the mechanic and technician staff have been trained in electric vehicle needs. CAT is committed to training current staff as opposed to replacing staff to acquire these skills.

CAT intends to secure training as part of the purchase price of the vehicles. CAT staff should take full advantage of this training and any other training offered by the manufacturer. Most likely, a subset of the current workforce in this department will be trained first and then they will train the other members of the team. Any additional employee training needed beyond the manufacturer training will be acquired and paid for by CAT.

- **Operators** | In order to ensure the best fuel economy, operators will be trained on how to best operate the vehicles. Buses will be purchased with feedback mechanisms on the dashboard. Typically, manufacturers do not offer operator training so training will be conducted internally.
- **Other Staff** | It is not anticipated that any other staff will need to be trained on the new technologies beyond basic safety training.

Second, CAT will operate with the following policies in mind:

- **Displacement Prevention** | If certain technicians or mechanics are not interested in training on the electrical components of the vehicles (e.g., due to impending retirement), they will not be penalized by the agency.
- **Charging Protocols** | A charging protocol will be established for and evaluated when the vehicles are put into operation

8.9 Monitoring and Evaluation Strategy

The following strategy is proposed to CAT as a way to identify key performance indicators that should be tracked and analyzed to evaluate vehicle performance. The goal of a monitoring and evaluation strategy is to compare hybrid, battery electric, and conventional diesel technology vehicle performance.

The National Renewable Energy Laboratory (NREL) tracks the performance of low- and zero-emission buses for several transit agencies across the nation. The proposed strategy below follows the template used by NREL, which tracks progress over time toward meeting the various technical targets set by the Department of Energy (DOE) and the U.S. Department of Transportation (USDOT).

To support data collection, CAT should negotiate with bus manufacturers during the purchase process for manufacturers to share data that is being collected on the vehicle. There is valuable information being collected and can be used to support these monitoring and evaluation efforts.

To ensure that the data generates meaningful analysis the following points should be considered:

- Keep separate data for each technology type: diesel, hybrid, and battery electric vehicles; revenue vehicles separate from support vehicles. This data should include:
    - Miles
    - Revenue hours
    - Miles between road calls for all types of breakdowns and for propulsion-related breakdowns
    - Fuel cost/revenue mile
    - Maintenance cost/revenue mile

    - Bus availability rate (percentage of days the buses are available as a percentage of days that the buses are planned for passenger service)
    - Fuel economy (in diesel gallon equivalents for battery electric buses)
- Generate the following analytics in a biannual report:
    - Data summary
    - Total miles and hours for each technology type
    - Average monthly mileage for each bus within each technology type
    - Availability Analysis
        - Days available
        - Days unavailable
        - Reason for unavailability
    - Fuel Economy and Cost Analysis
        - Miles per diesel gallon equivalent for battery electric buses compared to miles per gallon for hybrid buses
        - Fuel/electricity cost per mile for each technology type
    - Roadcall Analysis
        - Compare total miles between roadcalls for each technology type
        - Compare total miles between propulsion roadcalls for each technology type
    - Maintenance Analysis
        - Compare total cost of parts and hours of labor per mile for each bus under each technology type
        - Compare the maintenance types by technology types
    - Generate a summary of findings and comparisons for each analysis
- Review and report monitoring and evaluation biannually to transit agency leadership

EXECUTIVE SUMMARY
Reports and Presentations
Item 6a
Collier Area Transit Paradise Beach Trolley

Objective:
To update the Committee on the Paradise Beach Trolley, providing service from Conner Park to Delnor-Wiggins Pass State Park and Vanderbilt Beach.

Considerations:
Collier Area Transit (CAT) is again offering a beach bus, rebranded as Paradise Beach Trolley in 2024, to Collier County residents and visitors.

The Paradise Beach Trolley started service on President's Day weekend, February 14th-17th, and will last until April 27th, 2025. The service consists of a free trolley traveling in a loop from Delnor-Wiggins Pass State Park to Vanderbilt Beach stopping at Conner Park in between.

The Paradise Beach Trolley operates from 8:00 a.m. to 3:00 p.m., then again from 4:30 p.m. to 7:00 p.m. The service will be offered Friday through Sunday with a roughly 20-minute frequency. Additionally, CAT will be offering the Paradise Beach Trolley through the week of spring break (Mar. 10-14) and the week leading up to Easter (Apr. 14-18).

Overall, CAT has had great success in growing the Beach Bus service in previous operating years and plans continue to provide the service.

Recommendation:
None

Attachment:
Beach Bus Route Map

Prepared by: _____ **Date:** 3/13/25
Alexander Showalter, Planner II

Approved by: _____ **Date:** 3/13/25
Omar DeLeon, Transit Manager


1
2
Bluebill Ave.
Conner Park
Wiggins Pass
Gulf Shore Drive
Vanderbilt Drive
Vanderbilt Beach Rd.
3
Vanderbilt Beach
N

EXECUTIVE SUMMARY
Reports and Presentations
Item 6b
Major Transit Development Plan Update

Objective:
To update the Committee on the progress of the ongoing Major Transit Development Plan update being completed by CAT, Collier MPO, and our consultant Stantec.

Considerations:
To receive State Block Grant Funds for transit system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five years. The TDP is a 10-year plan for transit needs, cost and revenue projections, and community transit goals, objectives, and policies. The TDP serves as Collier Area Transit's planning, development, and operational guidance document, and the major update is developed in coordination with the MPO's Long-Range Transportation Plan.

CAT Staff has been working with the Consulting Team of Stantec and MPO Staff to update the plan. The consultant has made steady progress on the update by producing consistent updates to each section of the TDP, as well as recently completing our public engagement with public workshops and presentations. CAT and the MPO Staff have been providing comments and feedback on these working documents produced so far and ask the PTAC for any further input.

As MPO and CAT comments have been incorporated into the documents, we would like to provide updates on the progress of the report for discussion and receive any further comments from the committee.

Recommendation:
None

Attachment:
Technical Memo No. 3 – Trends Revenue Projections

Prepared by: _____ **Date:** 3/13/25
Alexander Showalter, Planner II

Approved by: _____ **Date:** 3/13/25
Omar DeLeon, Transit Manager

Date: March 10, 2025

Reference: Contract 18-7432 MP Professional Services Library – Metropolitan Planning
Transit Development Plan (TDP) Major Update
Purchase Order/Work Order No. 4500229353
Project No. 33804.6.2.3

Document: **Trends Revenue Projections – Technical Memo No. 3**

Table of Contents

1 INTRODUCTION....3

2 MARKET TRENDS AND INFLUENCES....3

3 BUSINESS CLIMATE AND SOCIOECONOMIC ANALYSIS....3

3.1 Business Climate....3

4 SERVICE AND OPERATIONAL STRATEGY....4

4.1 Mobility-On-Demand (MOD)....4

4.2 Public vs Private....5

4.3 Operational Alternative Fuel Technologies....5

5 TECHNOLOGY AND INNOVATION IN TRANSIT SERVICES....6

5.1 Bus Shelter Technology....6

5.2 Apps....6

5.3 Artificial intelligence (AI)....6

5.4 Internet of Things (IoT)....6

5.5 Zero Emission Study....7

5.6 Automated Passenger Counting (APC)....7

6 PRIORITIZED SERVICE, CAPITAL AND POLICY....7

6.1 Previous TDP 10-year vision....7

6.2 Tenth year transit implementation plan....8

6.3 Capital Requirements and Operating Requirements....8

6.3.1 Cost Assumptions....9

6.3.2 Revenue Assumptions....9

6.4 Implementation Plan Accomplishments and Changes....10

6.5 Stakeholder Input....13

6.1 Policies and Mission Statement Development....14

7 NEXT STEPS....15

7.1 UF/IFAS Lehigh Acres Route....15

7.2 Regional Fare....16

7.3 Seasonal Demand/ Park-and-Ride....16

7.4 Trolleys....18

7.5 Smart Technology....18

7.6 Capital Infrastructure Improvements....18

7.7 MOD....19

LIST OF TABLES

Table 1: 10-Year Operating and Capital Costing....10

LIST OF FIGURES

Figure 3-1: 12-month percentage change, Consumer Price Index 4

Figure 7-1: Recommended Priority Sites Park-and-Ride 17

1 Introduction

The landscape of transit services in Collier County is evolving rapidly, influenced by both emerging trends and existing challenges. This memo outlines the key trends shaping the future of transit, including technological advancements, shifts in market demands, and operational strategies. These trends present both positive opportunities and significant obstacles for the county's transit system. On the one hand, innovations like Artificial Intelligence (AI), Internet of Things (IoT), and Electric Vehicles (EVs) promise increased efficiency, reliability, and sustainability. On the other hand, challenges such as funding constraints, fluctuating demand, and infrastructure limitations could hinder the county's ability to fully leverage these advancements. This memo examines these trends, exploring the ways in which they will influence service delivery, operational efficiency, and customer experience, while also addressing the opportunities and challenges that Collier County must navigate to improve its transit system.

2 Market Trends and Influences

Transit planning in Collier County is poised to evolve under the influence of economic growth, housing trends, and residual impacts of the COVID-19 pandemic. Housing trends further underscore the need for strategic transit investments. As of October 2024, the median listing price for homes in Collier County was $739,000, a 10.9% decrease from the previous year, while the median sale price increased by 3% to $648,714. These dynamics suggest a complex housing market where affordability challenges persist, potentially driving some workers to live farther from employment centers. Transit systems must address this disparity by ensuring connectivity between suburban or exurban areas and key job hubs.

The COVID-19 pandemic has also left a lasting impact on transit needs in the county. In 2022, 11.7% of workers telecommuted, making it the second most common work mode after driving alone. This trend toward remote work, which emerged during the pandemic, could result in sustained reductions in peak-hour transit demand. However, it may also necessitate greater flexibility in transit operations to cater to sporadic, off-peak travel. Despite the changes brought about by COVID-19, there is still a need for service workers, particularly in the western portion of the county. Telecommuting represents a potential transportation demand management (TDM) strategy to reduce congestion and environmental impact in Collier County. These factors collectively call for adaptive, forward-thinking transit planning that balances immediate needs with long-term sustainability.

3 Business Climate and Socioeconomic Analysis

3.1 Business Climate

Since December 2020, when the 2021-2030 CAT 10-Year Transit Development Plan was developed, the Consumer Price Index (CPI) grew from 1.4% to a peak of 9.1% in June 2022 (source: US Bureau of Labor Statistics, BLS). The CPI has since dropped to 2.4% as of September 2024. While the CPI has dropped, it is an index, so it measures change over time; thus, actual costs have remained elevated cumulatively 25.74% since 2021. The current operational contract for transit services with MV

Transportation was in-place before 2021 and is scheduled to be re-advertised for a new contract. It should be expected that bids will likely reflect the higher operational costs relative to inflation.

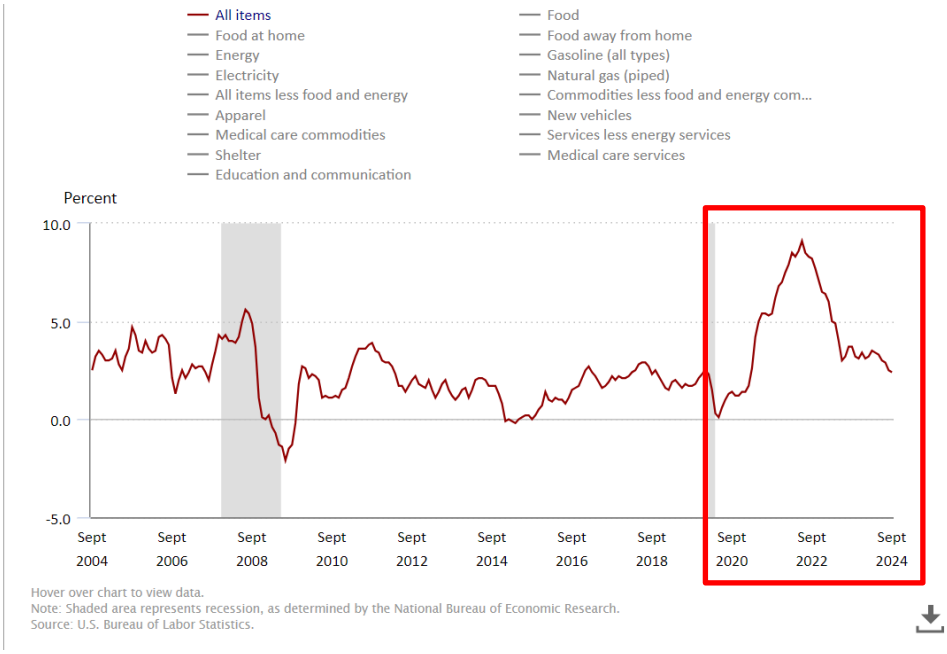


Figure 3-1: 12-month percentage change, Consumer Price Index

4 Service and Operational Strategy

4.1 Mobility-On-Demand (MOD)

Microtransit and Mobility on Demand (MOD) services are transforming public transportation, offering flexible alternatives to fixed-route buses. Providers like VIA Transportation, Inc and the Spare mobility operations platform are revolutionizing public transportation by offering flexible, on-demand options that go beyond traditional fixed-route and paratransit offerings. These services allow transit agencies to replace inefficient fixed routes with dynamic, demand-responsive transportation, providing cost-effective alternatives, especially in low-density areas or during off-peak times. By using real-time scheduling and route optimization, agencies can improve service efficiency, reduce operational costs, and better match supply with demand, ultimately offering a more flexible, user-friendly experience.

Agencies are increasingly adopting these solutions to address underperforming fixed routes, reducing the financial burden while improving rider satisfaction. For example, in Sarasota, Breeze Transit replaced two poor performing suburban fixed routes with MOD microtransit (North Port and Venice/Englewood). These routes provided service between two communities separated by longer distances. The use of MOD in place of these fixed routes served nearly 300,000 trips in 2023 at a cost per passenger comparable to a historically well-performing route. With the success of pilot projects, such as Breeze Transit in Sarasota, Florida, microtransit is proving to be an effective tool for transit agencies. By integrating technologies

similar to ride-hailing apps, like Uber and Lyft, these services enhance accessibility, streamline operations, and demonstrate the potential of mobility on demand as a sustainable transportation model for the future.

The use of MOD is being pursued at a national level. In North Carolina, 11 communities throughout the state applied for a three-year grant, the Rural Surface Transportation Grant, to pilot MOD microtransit services. The strategy to make a multi-community grant application may have more success in securing funding for more innovative services.

4.2 Public vs Private

Collier County, Florida, can enhance its transit system by integrating public oversight with private sector efficiencies in specific operational areas. One best practice approach is leveraging private partnerships for transit-oriented development (TOD), which focuses on transit and urban efficiency. TOD prioritizes a "transit first" philosophy, creating mixed-use facilities near transit hubs to improve ridership, reduce reliance on single-occupancy vehicles, and generate revenue for reinvestment into the transit system. This approach, as seen in Miami-Dade County with the "Transit Village" concept, promotes urban growth that aligns with public transportation needs, benefiting both infrastructure and community development.

Beyond TOD, Collier County could explore community-oriented development (COD), an emerging strategy designed to address community needs and equity. COD focuses on a "people first" philosophy, emphasizing community well-being, inclusivity, and long-term social benefits. By prioritizing affordable housing, local business support, and community engagement, COD ensures that development fosters economic growth while maintaining equity and preventing displacement. This approach provides a best practice for Collier County, promoting inclusive development and maximizing the benefits of transit-oriented projects for all residents.

4.3 Operational Alternative Fuel Technologies

Municipalities and corporations are increasingly exploring various alternative fuel technologies outside of traditional diesel fuel. By evaluating and potentially adopting similar strategies, Collier County can modernize its transit system, reduce carbon emissions, align with federal and state goals for expanding clean energy transportation, and be eligible for related federal grant funding. Since the initial roll out of battery electric vehicles (EV), the industry has developed technology evaluation tools that assist fleet managers in determining what alternative fuel source makes sense from a cost-benefit perspective. After assisting in selection of a technology, they also can help plan the re-fueling network based upon geographic demand and site availability.

Hydrogen is one example of the various emerging alternative fuel technologies. Hydrogen offers promoting advantages, such as zero emissions, faster refueling and longer range than EV vehicles, is particularly suited for heavy-duty and transit vehicles, and addresses challenges associated with EV charging infrastructure. California serves as an exemplified leader in advancing hydrogen fuel infrastructure. The state is working on expanding its "Hydrogen Highway," a network of hydrogen fueling stations across the state to support hydrogen-powered vehicles, including buses and trucks. Cities like Long Beach and Sacramento have deployed hydrogen fuel cell buses, while San Francisco is focusing on hydrogen-powered trucks for port operations.

5 Technology and Innovation in Transit Services

5.1 Bus Shelter Technology

Integrating advanced shelter technology for bus stops in Collier County can enhance the transit experience by providing solar lighting, real-time arrival displays, USB charging ports, and interactive kiosks for safety and convenience. These features offer schedule updates and route information while improving visibility and security at night. Incorporating weather protection, or climate-controlled environments could make public transit a more attractive option. For example, the Pinellas Suncoast Transit Authority (PSTA) in St. Petersburg has successfully implemented eco-friendly shelters with similar features, demonstrating the potential to modernize transit systems. Collier County, which has begun installing solar lighting, can implement these advancements to align with its efforts to enhance infrastructure, improve rider satisfaction, and increase transit usage throughout the region.

5.2 Apps

In Collier County, advanced transit technologies like ride-hailing apps, car-sharing platforms, and tools like the rideCAT Mobile App, rideCAT Connect Mobile App (paratransit), and the Transit App can improve transportation accessibility and efficiency. The rideCAT App allows users to buy bus passes, plan trips, find bus stops, track buses in real-time, provide rider feedback, and access Collier 311 (connects users to local government services). The rideCAT Connect App allows users to manage trips and track their bus in real-time. The Transit app provides the same features as the rideCAT app, excluding access to Collier 311, and even allows the user to navigate other transit systems within the Transit App, promoting regional connections. There is potential to expand these features to integrate ride-hailing, dynamic trip planning, and multi-modal travel options into a unified platform, which could streamline services. Enhancing user experience with personalized notifications and service alerts could further improve convenience, helping Collier County create a more connected and adaptive transit system.

5.3 Artificial intelligence (AI)

AI is enhancing transit services by improving operational efficiency and accuracy. Key applications include predictive maintenance, where AI analyzes data to forecast equipment failures and minimize downtime. AI also supports real-time tracking and route optimization, ensuring timely and efficient service. In addition, AI powers dynamic pricing, adjusting fares based on demand and other factors to optimize revenue. The rise of self-driving shuttles, using AI for navigation, is further streamlining operations and reducing costs. By leveraging AI for predictive applications, transit services can enhance both operational efficiency and customer experience. Predictive versus generative AI is less consumptive and faster because it is more focused.

5.4 Internet of Things (IoT)

IoT is revolutionizing transit services by providing real-time data for improved decision-making and service delivery. Sensors and smart devices installed on vehicles and infrastructure track vehicle location, passenger load, and operational health, enabling better route planning and reducing delays. IoT also supports predictive maintenance, allowing for proactive vehicle servicing. Additionally, IoT enhances the

customer experience by delivering accurate, real-time updates through mobile apps and digital displays. Through seamless connectivity, IoT improves operational efficiency and reliability, creating a smarter, more responsive transit system.

5.5 Zero Emission Study

A Zero Emission Fleet Transition Plan is being completed with anticipated end date of June 2025. This plan is to evaluate the potential impacts, benefits, and feasibility of a deployment plan to incorporate battery electric vehicles into Collier Area Transit's services and facilities.

5.6 Automated Passenger Counting (APC)

A robust Automated Passenger Counting (APC) system and an electronic fare card can significantly enhance data collection and operational efficiency in transit services. For example, Honolulu's HOLO card currently tracks boardings but not alightings, which refer to passengers exiting the vehicle. However, when combined with APC data, it still provides valuable insights into ridership patterns at the bus stop level. By cross-referencing this data with cost recovery and transit analytics software, agencies can gain a clearer understanding of passenger flow and service demand, leading to more informed decision-making and optimized resource allocation.

6 Prioritized Service, Capital and Policy

6.1 Previous TDP 10-year vision

The 10-year transit plan in the previous TDP identified improvements in the categories of service, capital and infrastructure, technology, and policy, resulting from extensive data evaluation and public outreach. Through the extensive analysis process undertaken to prepare the previous TDP, the data demonstrated that MOD performs better in suburban setting and operational trolleys perform better on the islands. The improvements listed in the 10-year vision take these key lessons learned into consideration, in addition to incorporating recommendations from stakeholders that were interviewed for the previous TDP.

Service improvements were identified and separated into phases; where prioritized network changes and frequency and span improvements were to be implemented in the initial five years, and lower priority improvements in the subsequent five years. The first few years would oversee route path and service frequency modifications. Service expansion and new services would be implemented further in the future, including trolley and shuttle services, MOD services in specific neighborhoods, and other new services.

Capital and infrastructure improvements in the 10-year vision are focused on the enhancement, safety, and accessibility of existing transit infrastructure. The rider experience while waiting for the bus is to be improved by improving infrastructure at bus stops including benches, shelters, bicycle storage facilities, and other infrastructure. ADA requirements should be fulfilled for all transit facilities and ensure the safety of all riders at bus stops. Additionally, existing vehicle fleet will be continuously replaced when necessary and new vehicles will be added to serve the proposed service improvements and new routes.

Technology improvements were categorized into either the replacement or upgrade of existing technology or the implementation of new technology. Existing technology to be replaced or upgraded included paratransit scheduling and dispatching software, computer-aided dispatch (CAD) or Automatic Vehicle Location (AVL) for fixed-route with supervisor remote laptop access, fare logistics fare collection system, and on-board surveillance system. New technology to be implemented include fixed-route scheduling software, Automatic Passenger Counter (APC) and Automatic Vehicle Announcement (AVA) systems for fixed-route vehicles, transit signal priority (TSP) system, paratransit fare payment system, Interactive Voice Response (IVR) system, and on-board information media system.

Lastly, the previous TDP also included several policy recommendations in the 10-year vision. This encompasses policy reviews and updates for transit and fare structuring, conducting studies for better understanding of the existing CAT system and for future MOD services, and coordinating with municipalities and other agencies for various transit-related discussions or programs. This includes collaboration with Collier County local municipal planning departments for new development transportation needs and transit provisions, with FDOT and Everglades City for the Everglades City Vanpool program, with LeeTran for a cross-county fare system, and with Marriott and other hotels in Marco Island for public-private partnerships.

There were also a few miscellaneous recommendations such as establishing marketing and branding strategies for non-fixed route services and creating a transfer hub along the urbanized area of Immokalee Road to facilitate passenger transfers provide a place for vehicle staging and for driver relief.

6.2 Tenth year transit implementation plan

The 2024 TDP Annual Progress Report included a very comprehensive list of activities leading to the creation of an implementation plan that would guide the County's development of services over a ten-year planning horizon.

With each update an additional tenth year is added to the implementation plan. Although an additional year was added, no improvements are scheduled to take place beyond what was identified in the last TDP Annual Progress Report update. Collier County will actively pursue funding opportunities to implement recommendations from the TDP.

6.3 Capital Requirements and Operating Requirements

This section presents the financial plan, detailing capital and operating costs as well as revenues associated with maintaining the current system (status quo) and implementing the 10-Year Needs Plan. The financial plan serves as a planning tool to estimate the costs of services and related capital improvements but does not constitute a funding commitment or an obligation to deliver any listed service or project within the specified year.

There is no proposed increase to transit funding, this can be assumed due to the anticipated changes in the both the state and federal administration funding policies. Thus, there is consistency with the Collier County Fiscal Year (FY) 2025 Adopted Budget on identified funding and financial plan.

To project public transportation costs and revenues over the TDP planning period of FY 2026 through FY 2035, multiple assumptions were applied. These assumptions regarding operating and capital costs and

revenues are informed by sources such as, historical trends, operating characteristics, and planning documents.

6.3.1 COST ASSUMPTIONS

6.3.1.1 Operating

Numerous cost assumptions were made to forecast transit costs for 2026 through 2035. These assumptions are based on a variety of factors, including service performance data from CAT and information from other recent Florida TDPs. These assumptions are summarized as follows:

- Annual operating costs for fixed-route and paratransit services are based on the most recent adopted budget (FY25). These costs include the cost to operate and maintain existing services and facilities, such as administrative buildings, maintenance facilities, and transit hubs.
- An annual inflation rate of 1.0228 % was used for all operating cost projections, based on the average Consumer Price Index (CPI) as used in the 2024 TDP Annual Progress Report (Progress Report).
- Annual operating costs for future service enhancements are based on the projected annual service hours and cost per revenue hour of $118 for fixed route service.

6.3.1.2 Capital

Several assumptions were developed to project the costs for capital needs identified previously and are summarized as follows:

- New vehicles planned to be purchased include those necessary to replace vehicles within the existing fleet that have reached the end of their useful life and vehicles to implement the new service.
- Vehicles are assumed to cost $576,800.60 for a fixed route bus, $158,653.28 for paratransit vehicles, and $45,000 for support vehicles, based on information provided by CAT. The fixed route cost was derived by averaging the total net value of 30-40’ fixed route buses and the total net cost of paratransit use to determine the cost of one bus. 32 fixed route buses, 8 support vehicles, and 68 paratransit vehicles will need to be purchased between 2026 and 2035.
- An annual inflation rate of 1.0228% was used for capital cost projections, based on average CPI as used in the 2024 TDP Annual Progress Report.
- The useful life for motor bus replacement is assumed to be 12 years. The useful life for paratransit vehicle replacement is assumed to be 5 years, reduced by 2 years from the previous TDP.

6.3.2 REVENUE ASSUMPTIONS

Revenue assumptions for fixed route service are based on information from several state and local agencies. Assumptions for different revenue sources, including annual operating revenues are from the CAT FY 2024 TDP Annual Progress Report, the Collier County Government FY 2025 adopted budget,

FDOT's Work Program for FY2025-2029, FDOT's draft tentative Work Program for FY2026-2030, and the CAT maintenance and operational facility funding document.

- Federal Grants 5307 and 5311 for operating assistance reflects the FY 2025 adopted budget.
- Federal Grant and Local Match 5307 ADA – Operating anticipates no further allocation to these two funds for operations in the future.
- Federal Grant 5307 PM – Operating anticipates further allocation to these funding in the future.
- Federal Grants 5307, 5339 and 5324 for capital, reflects the CAT maintenance and operational facility funding.
- Grants 5310 for capital reflects the costing of paratransit. 10% of the paratransit costing is derived each from State and Local Match, while 80% is from Federal Match.
- Based on vehicle information provided by CAT staff, a total of $18.8 million in capital funds was assumed in the 10-year plan to fund the existing fixed-route bus replacement program and $11 million for paratransit vehicles.
- Projected fare revenues for existing services are based on FY 2024 YTD Route Statistics data provided by CAT, with a conservative 1.7% annual growth rate applied.
- New State Block Grant – the formula to allocate Block Frant funds for operating is based on three components: population of service area, ridership and revenue miles. Block grant revenues are approximate based on the information that was provided.

6.4 Implementation Plan Accomplishments and Changes

Significant progress has been made on many of the goals and the implementation plan outlined in the previous TDP. However, some route changes, frequency enhancements, and service expansions have been delayed by a few years due to funding constraints. These adjustments are reflected in the implementation plan below, with the target years updated in accordance with the TDP's annual progress report. Table 1 below provides a copy of the implementation plan included in the last TDP Update highlighting those service improvements.

Table 1: 10-Year Operating and Capital Costing

Service Improvements	Proposed Implementation Year	10-Year Operating Cost YOE	10-Year Capital Cost YOE	Existing or New Revenues
Maintain Existing Service				
Maintain Existing Fixed-Route Service	2026	$ 105,095,886.00	$ 18,878,453.00	Existing
Maintain Existing Paratransit Service	2026	$ 79,585,921.00	$ 11,034,399.00	Existing

Service Improvements	Proposed Implementation Year	10-Year Operating Cost YOE	10-Year Capital Cost YOE	Existing or New Revenues
Replacement Support Vehicles	2026	$ 0.00	$ 368,208.00	Existing
Route Network and New Service				
New Bayshore Shuttle	2027	$ 4,480,750.00	$ 158,653.28	Unfunded
New Route 31 (Golden Gate Pkwy) (Split Route 25 E-W)	2027	$ 6,945,109.00	$ 576,800.60	Unfunded
Realign Route 14 operate at 60 min. headway	2027	$ 319,523	$ 0.00	Unfunded
Realign Route 23 headway 60 to 40 minutes	2028	$ 5,321,808.00	$ 0.00	Unfunded
Route 30 (Goodlette Frank Rd) (Split Route 25 N-S)	2028	$ 6,178,440.00	$ 0.00	Unfunded
Route 32 (Collier Blvd) (Split Route 27 N-S)	2029	$ 4,961,028.00	$ 576,800.60	Unfunded
Express Premium Route to Lee County	2029	$ 5,277,761.00	$ 576,800.60	Unfunded
UF/IFAS and Lehigh Acres	2031	$ 1,348,673.00	$ 576,800.60	Unfunded
New Route 33 (Immokalee Rd) (Split Route 27 E-W)	2031	$ 3,506,569.00	$ 576,800.60	Unfunded
Immokalee MOD	2031	$ 3,035,294.00	$ 158,653.28	Unfunded
Frequency Improvements				
Route 15 from 90 to 45 min	2027	$ 2,759,543.00	$ 576,800.60	Unfunded
Route 121 - add one AM, one PM	2027	$ 1,546,739.00	$ 576,800.60	Unfunded
Route 11 from 30 to 20 mins	2027	$ 8,025,908.00	$ 576,800.60	Unfunded

Service Improvements	Proposed Implementation Year	10-Year Operating Cost YOE	10-Year Capital Cost YOE	Existing or New Revenues
Route 12 from 90 to 45 mins	2027	$ 9,822,575.00	$ 0.00	Unfunded
Realign Route 13 shorten to 40 min. headway	2027	$ 5,295,288.00	$ 0.00	Unfunded
Route 17 from 90 to 45 minutes	2027	$ 7,944,903.00	$ 576,800.60	Unfunded
Route 16 from 90 to 45 min	2029	$ 5,020,662.00	$ 576,800.60	Unfunded
Route 13 from 40 to 30 min	2029	$ 4,717,399.00	$ 0.00	Unfunded
Route 14 from 60 to 30 min	2031	$ 4,269,564.00	$ 576,800.60	Unfunded
Later Service				
Route 19 - Extend to 10:00 PM	2029	$ 607,255.00	$ 0.00	Unfunded
Route 11 - Extend to 10:00 PM	2031	$ 587,636.00	$ 0.00	Unfunded
Route 14 - Extend to 10:00 PM	2031	$ 533,689.00	$ 0.00	Unfunded
Route 24 - Extend to 10:00 PM	2031	$ 620,390.00	$ 0.00	Unfunded
Route 15 - Extend to 10:00 PM	2031	$ 185,282.00	$ 0.00	Unfunded
Route 17 - Extend to 10:00 PM	3031	$ 1,303,742.00	$ 0.00	Unfunded
Other Improvements				
Transit Fare Study	Every 5 years	$ 0.00	$ 111,600.00	Unfunded
Zero/Low Emissions Vehicles & Infrastructure	2025	TBD		Unfunded
Study: I-75 Managed Lanes Express	2026	$ 0.00	$ 25,000.00	Existing
Study: Santa Barbara Corridor Service	2026	$ 0.00	$ 25,000.00	Existing

Service Improvements	Proposed Implementation Year	10-Year Operating Cost YOE	10-Year Capital Cost YOE	Existing or New Revenues
Downtown Autonomous Circulator	2031	$ 1,965,220.00	$ 0.00	Unfunded
Electric Naples Pier Shuttle	2031	$ 3,082,699.00	$ 158,653.28	Unfunded
MOD Demand and Operations Requirements Pilot Project	TBD	TBD		Unfunded
Study: Immokalee Transfer Station	TBD	TBD		Unfunded

6.5 Stakeholder Input

As part of the public engagement process for the new TDP update, several community leaders and decision-makers were interviewed for their perspective and insights as a stakeholder.

The role of transit in Collier County was viewed primarily as a service for workers to access jobs and to serve persons without access to a vehicle, and secondarily as a service to help relieve parking and roadway congestion or in certain locations as a service for visitors. However, all interviewed stakeholders agreed that all CAT customers should be treated as primary customers and no one group should be prioritize over another.

The stakeholders raised several challenges faced by CAT which are fairly similar to issues identified by stakeholders in the previous TDP. The key themes gathered from the feedback are listed below:

- There is a need for more communication and information sharing to the public as most know about the CAT bus system but are not familiar with how to use it or where it operates. Improved communication can promote transit as an option.
- Adding new service to underserved areas is an identified priority.
- Municipalities should be able to work with CAT to secure additional services, but this option should be fully vetted to avoid impacts to the overall system. There could be opportunity for municipalities to pursue funding additional transit service, but this approach should be implemented with caution as there could be unintended consequences, including the challenge of determining cost-sharing, straining the core operations, and creating gaps or disjointed service.
- CAT should diversify its funding base and develop new financing strategies, such as adding new revenue streams rather than targeting or relying on any one area and revisiting past decisions on advertising revenue.
- Policymakers are very focused on cost-cutting and operating efficiency. CAT should be prepared to provide information that supports a careful business plan.

- CAT should continue to develop operational efficiencies that facilitate use of transit by residents and visitors including developing transit hubs, increased use of technology, and improved regional connectivity with Lee County.

- Policy makers stressed the need for connectivity between modes, accommodating the use of micromobility including e-bikes, shared use paths, and bicycle and pedestrian walkways as means of supporting transit, its users, and operational efficiency.

- Overall, there is a positive outlook for transit in Collier County, but it is tempered by the challenges of limited resources, continued growth in outlying areas, and increasing costs.

In general, all the interviewed stakeholders expressed a need for more transit service and service options in Collier County. They all shared the sentiment that improving transit services and adding more mobility options would be good for the community and the local economy.

6.1 Policies and Mission Statement Development

As part of the Transit Development Plan update process, several plans and studies in relation to transportation in Collier County were examined for relevant key findings. This included local plans, policies, and programs that would help to form the recommendations developed in the updated Transit Development Plan. An initial listing is as follows:

- Collier County Strategic Plan 2024
- City of Naples Comprehensive Plan – Transportation Element
- City of Marco Island 2040 Comprehensive Plan
- City of Everglades City 2045 Comprehensive Plan
- Collier County Comprehensive Plan – Transportation Element
- Collier Area Transit 2021-2030 Ten-Year Transit Development Plan Major Update
- Collier Area Transit Transit Development Plan FY2023 Annual Progress Report
- Collier County Bicycle and Pedestrian Master Plan
- Collier County Bicycle and Pedestrian Master Plan 2020 Amendment
- Collier County Transportation Disadvantaged Service Plan
- Collier County Transit Impact Analysis Final Report and Recommendations
- Collier County 2045 Long Range Transportation Plan
- Collier Area Transit Regional Service and Regional Fare Study
- Strategic Regional Policy Plan by the Southwest Florida Regional Planning Council
- Florida Transportation Plan: 2055 FTP
- Florida Department of Transportation State Management Plan December 2023
- Florida Department of Transportation Complete Streets Implementation Update: Handbook and Design Manual
- Fixing America's Surface Transportation (FAST) ACT
- Infrastructure Investment and Jobs Act (IIJA) / Bipartisan Infrastructure Law (BIL)

In addition, CAT’s mission statement goals, objectives, and initiatives have all been reviewed and updated to reflect CAT’s continued efforts towards improving transit services. These goals and objectives reflect the current conditions of Collier County and align with the course set by policy makers. They will help to guide policy changes and decision-making.

CAT's vision for public transit is to provide effective and efficient multimodal mobility services to meet the mobility needs of workers, residents, visitors, to support economic, environmental, and community benefits. The mission statement goals are listed below:

- Goal 1: Operate reliable, convenient, and cost-effective mobility services that safely and efficiently meet the mobility needs of Collier County's workers, residents, and visitors.
- Goal 2: Increase the resiliency of Collier County, protecting our infrastructure and natural resources, by providing attractive and convenient mobility alternatives that will reduce adverse carbon and environmental impacts within our communities.
- Goal 3: Build meaningful partnerships that increase awareness and education of and about mobility options and increase the viability of mobility services to promote livability and enhance economic and social well-being.
- Goal 4: Coordinate the development and provision of mobility services with local, regional, state planning efforts and through public and private partnerships.
- Goal 5: Use technologies and innovation in service deliver to improve productivity, efficiency, reliability, and cost-effectiveness of mobility services and operations.
- Goal 6: Monitor and improve mobility service quality and service standards.
- Goal 7: Maximize the use of all funding sources available, including through partnerships with businesses, employers, and other institutions to increase and improve access to mobility services and mobility workers, residents, visitors.

7 Next Steps

7.1 UF/IFAS Lehigh Acres Route

With the completion of the Collier Area Transit Regional Service and Regional Fare Study (2024), the UF/IFAS Lehigh Acres Route ranked the highest or the regional routes studied based upon origin-destination data, population that use transit and the high reduction of travel time. Public and Stakeholder feedback strongly supported this regional route because it addresses an existing and growing workforce need. LeeTran also identified this route as a need in their TDP. The next steps for this route are:

- Work jointly with LeeTran to obtain funding and approve an agreement on route operation building upon the already established regional service agreement.
- Pursue a separate fee structure with CAT operating the route.
- Charge CAT fares aboard the regional bus with CAT retaining all revenue.
- Determine demand by collecting feedback on desired times of service, frequency and stops.

7.2 Regional Fare

Based on the *Collier Area Transit Regional Service and Regional Fare Study*, a joint fare structure between CAT and LeeTran should be pursued if both agencies recognize the value of qualitative benefits despite the costs. To move forward, a cost-benefit analysis is recommended to assess financial feasibility and long-term impacts. This analysis should evaluate factors such as ridership demand, administrative and technology costs, potential revenue changes, and rider feedback. Additionally, it should explore strategies to balance costs while improving service accessibility. Conducting this assessment will help determine whether a joint fare structure is a practical and beneficial option for regional transit.

7.3 Seasonal Demand/ Park-and-Ride

The occurrence of the seasonal population growth and visitors from winter to spring is typical in Florida but magnified in southwest Florida. Strongly concentrated closer to the coast the high consumption of roadway capacity coupled with the parking deficit on the barrier islands creates special event scenarios that last for months. This has lasting effects on existing residents' quality of life, the visitors experience and the commute time for workforce resulting in negative impacts to businesses. Integrated approach that blends parking infrastructure, transit services and technology together to improve the overall daily travel experience. Studies such as the Park-and-Ride Study (November 2020) have led to implementation of a mobile payment system (PayByPhone) that is also used by the City of Naples as well as identifying funding strategies for park-and-ride lots as prioritized in Figure 7-1.

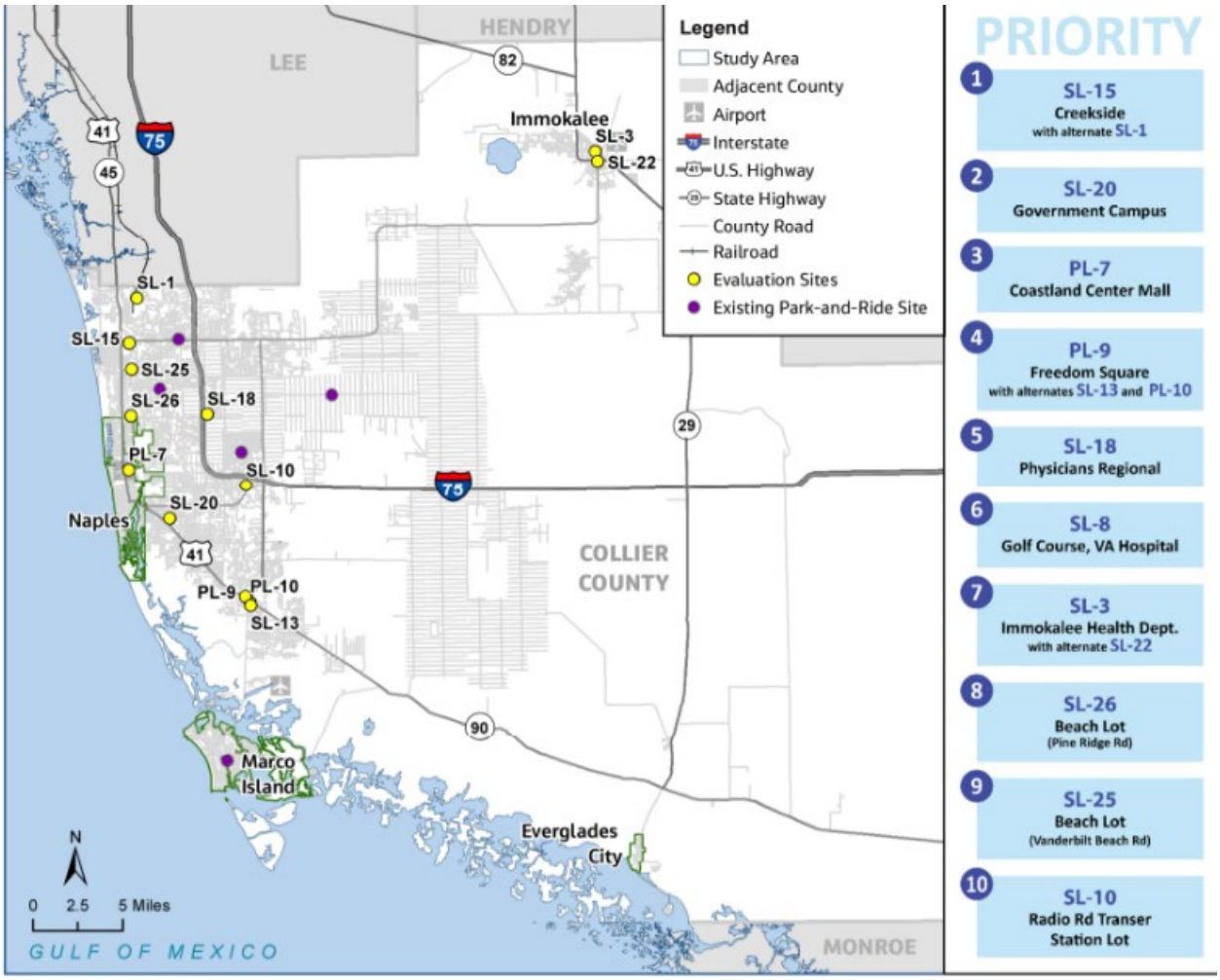


Figure 7-1: Recommended Priority Sites Park-and-Ride

To further address these seasonal challenges, securing funding and fostering public-private partnerships are important for the development and expansion of park-and-ride lots. These partnerships can help maximize available resources, identify optimal locations for facilities, and ensure long-term sustainability. By collaborating with private businesses and transit agencies, Collier County can create a well-integrated network that supports increased demand for parking and transit services during peak tourist seasons.

Federal funding opportunities are available through the Federal Transit Administration (FTA) to support projects that enhance transportation infrastructure and reduce congestion. The *Congestion Mitigation and Air Quality (CMAQ) Improvement Program* provides funding for initiatives that aim to decrease traffic congestion and improve air quality, making it a suitable option for park-and-ride facilities that help alleviate roadway congestion. Additionally, the *Surface Transportation Block Grant (STBG)* offers financial assistance for a range of transit and infrastructure projects, including the development of park-and-ride lots, ensuring that these facilities can be effectively integrated into the broader transportation network.

At the state level, the Florida Department of Transportation (FDOT) administers programs designed to enhance public transportation options. The *FDOT Park-and-Ride Lot Program* provides both funding and

technical support for establishing new park-and-ride facilities, helping to address the region's seasonal transportation demands. By leveraging these federal and state funding sources, Collier County and the City of Naples can expand park-and-ride infrastructure, improving mobility options for both residents and visitors while reducing roadway congestion during peak travel seasons.

In addition to traditional payment platforms, leveraging technology to enhance user convenience and efficiency is crucial. Integrating real-time tracking of parking space availability into a trip planning application and online tool would allow residents and visitors to easily locate open spaces or even reserve a space, reducing congestion and frustration. This data should also be linked to public transit schedules, rideshare services, and alternative transportation options, creating a seamless and connected mobility experience.

To further support seasonal mobility needs, developing a mobility-on-demand service with designated service zones connecting park-and-ride lots to key destinations should be considered. This service could include shuttle buses, microtransit, or rideshare partnerships tailored to high-traffic areas such as downtown Naples, beaches, and shopping districts. Implementing such a system would alleviate parking shortages, improve access/reliability for residents and visitors, and help reduce congestion, ultimately enhancing the overall travel experience.

7.4 Trolleys

To address transportation needs and revenue potential, Collier County should look into expanding its trolley system where acceptable by residents and stakeholders. Exploring new routes that connect popular tourist attractions, commercial hubs, and residential areas could increase ridership and make trolleys a more viable revenue source. Trolleys have been found to be more cost effective when deployed on barrier islands or as connectors to barrier islands. The county might also assess the feasibility of introducing nominal fares or securing sponsorships and advertising opportunities to offset operating costs.

7.5 Smart Technology

The incorporation of smart technology into Collier County's parking and transportation systems is another avenue worth pursuing. Implementing smart parking meters, dynamic pricing models, and mobile app integrations could enhance convenience for users while increasing revenue. These advancements would position Collier County as a forward-thinking community, offering modernized services that cater to both residents and visitors while boosting overall efficiency.

7.6 Capital Infrastructure Improvements

Collier County is advancing its transit infrastructure with key investments, including the construction of a new Operations and Maintenance Facility and enhancements to transit stops. The next step in this process is to finalize the amendment to the grant in the Transit Award Management System (TrAMS) to secure Federal Transit Administration (FTA) concurrence for the new facility. In parallel, Collier County will continue reallocating awarded grant funds to support the project, ensuring financial readiness. The design process will commence in 2024 with an estimated $18 million dollars in project costs. The new facility will be built on the existing site while current operations continue, minimizing disruptions to transit services.

In addition to the new facility, Collier County is prioritizing upgrades to transit stops to enhance accessibility, safety, and passenger experience. Planned improvements include the installation of shelters, lighting, seating, and ADA-compliant infrastructure to better serve the community. The county will assess high-traffic locations and areas of critical need to ensure that enhancements align with ridership demand. Coordination with stakeholders, including local agencies and community partners, will be essential in finalizing design elements and construction schedules. By advancing these infrastructure projects, Collier County is strengthening its transit network, improving operational efficiency, and ensuring long-term sustainability in public transportation.

7.7 MOD

To improve public transit accessibility and efficiency, Collier County should move forward with evaluating and implementing Mobility on Demand (MOD) and first-mile/last-mile (FMLM) solutions. These efforts will foster greater connectivity, especially in underserved areas, and complement existing transit services, enhancing overall mobility for both residents and visitors.

Collier County has an opportunity to optimize its public transportation network by adopting MOD services, which can replace underperforming fixed routes, particularly in low-density areas and off-peak hours. MOD aligns transit services with actual demand, making them more efficient and responsive. Integrating FMLM solutions will close the gap between transit stations and riders' final destinations, improving system accessibility and convenience. A feasibility study to identify locations where MOD and FMLM can replace, or supplement current services is a crucial first step.

To ensure success, Collier County should explore successful case studies such as Breeze Transit in Sarasota and consider partnerships with MOD technology providers for real-time scheduling and route optimization. A pilot program incorporating FMLM solutions, such as microtransit or bike-sharing services, should follow to further enhance connectivity. Engaging with the community throughout the process will ensure that these solutions effectively meet residents' needs.

By advancing MOD and FMLM solutions, Collier County can strengthen its transportation network, improve accessibility, and enhance the efficiency and reliability of public transit services to better serve its growing population. These steps will pave the way for a more seamless, responsive transit system that benefits the entire community.

To increase funding opportunities and improve regional connectivity, Collier County could explore partnerships with neighboring entities, such as Lee County, to jointly apply for federal and state transportation grants. Similar to North Carolina’s success in securing funding from the New Rural Surface Transportation Grant Program, for on-demand transit services across multiple rural communities, a collaborative regional approach can increase the competitiveness of grant applications, leverage shared resources and expand mobility solutions for residents across county lines.

MINUTES OF THE PUBLIC TRANSIT ADVISORY COMMITTEE MEETING

NAPLES, FLORIDA

JANUARY 15, 2024

LET IT BE REMEMBERED, the Public Transit Advisory Committee in and for the County of Collier, having conducted business herein, met on this date at 1:00 P.M. in REGULAR SESSION at Collier County Museum Lecture Hall, 3331 Tamiami Trail E, Naples, Florida with the following members present:

Chair:	John DiMarco, III
Vice Chair:	Peter Berry
	Cliff Donenfeld
	Dewey Enderle (Excused)
	Sonja Lee Samek
	Benita Staadecker
	Open Seat

ALSO PRESENT: Brian Wells, Director, Collier County PTNE
Omar DeLeon, Public Transit Manager, Collier County PTNE
Alexander Showalter, Senior Planner, Collier County PTNE
Keyla Castro, Operations Support Specialist, Collier County PTNE
Elena Ortiz-Rosado, Events, Sales and Marketing Coordinator, PTNE
Jacob Stauffer, Transit Planner, MV Transportation

1. **Call to Order**
   Chair DiMarco called the meeting to order at 1:00 P.M.

2. **Roll Call**
   Roll call was taken, and a quorum of four was established.

3. **Approval of Agenda**
   Ms. Staadecker moved to approve the Agenda as presented. Second by Vice Chair Berry. Carried unanimously 4 - 0.

4. **Approval of Minutes**
   Ms. Staadecker moved to approve the minutes of the November 20, 2024, Public Transit Advisory Committee meeting as presented. Second by Vice Chair Berry. Carried unanimously 4 - 0.

Ms. Samek joined the meeting at 1:04 P.M. A quorum of five was present.

5. **Committee Action**
   None

6. **Reports and Presentations**
   a. **Update on Transit Development Plan (TDP) Process**
   Mr. Showalter presented the Executive Summary "*Update on Transit Development Plan (TDP) Process*" to the Committee. He noted:
   - The TDP process identifies recommendations and implementation strategies to achieve the goals and objectives of Collier Area Transit.
   - To receive State Block Grant Funds for system operations, each transit agency must develop a Transit Development Plan (TDP) Major Update every five (5) years.
   - The TDP is a ten (10) year plan for transit needs, cost and revenue projections, community transit goals, objectives, and policies.
   - The TDP serves as a planning, development and operational, guidance document.
   - TDP Components include:
     - Mission, Goals, and Objectives – Overall purpose, specific, achievable targets, and actions to reach the goals.
     - Situational Appraisal – Identifying and addressing concerns.
     - Recommended Network Changes – Service Improvements and New Service.
     - Financial Element – Alternative funding sources required to implement initiatives.
     - Public Outreach – Public Surveys and Workshops, and Stakeholder interviews.
   - The major update is developed in coordination with the Metropolitan Planning Organization's (MPO) long range transportation plan.
   - Collier Area Transit staff have been working with the Consulting Team of Stantec and MPO Staff to update the plan.
   - The consultant has produced the Public Involvement Plan, consistent updates to each section of the TDP and identified new peers for comparison of transit systems.
   - MPO and CAT Staff's feedback and comments have been incorporated into the documents.

Approval Process Key Dates 2025

- March 1 - Complete TDP Draft
- March 1 - 30 Day Public Comment Period
- June 1 - Final Proposed TDP
- June 13 - Submission to MPO Board
- June/July - Submission to the Collier Board of County Commissioners

Comments

Mr. Showalter responded to queries:

- Venues to inform the public about proposed system changes include the County website, the County Commissioner newsletter, and Public Workshops. Additional Social Media venues will be researched.
- Suggested roadway network improvements such as integration of HOV lanes and lane restriction access for commercial trucks will be submitted to the MPO for evaluation.
- A light rail system (LRT) has not been considered for County transportation.

If members of the Committee have any comments or questions on the update they should contact Mr. Showalter.

b. Zero Emissions Plan Update

Mr. Showalter presented the Executive Summary "*Zero Transmission Plan Update*" to the Committee. He noted:

- CAT Staff, the MP0, and consulting firm Benesch have initiated the process to develop a Zero-Emissions Transition Plan.
- The Plan is a strategic initiative by CAT to transition the existing fleet of diesel busses, into a mixed fleet including zero or low-emissions alternatives.
- The plan is critical to grant applications related to zero or low-emissions purchases.
- The Plan will assess the financial, operational, and infrastructural changes required to adopt zero or low-emission technologies into CAT's fleet.
- The goal is to provide a path forward to include these vehicles into CAT's everyday fleet in a cost-effective and operationally efficient manner.

7. Member and Staff Comments

Member Information

- Committee Members data should be updated on the County website by March 31, 2025.

Marco Island Parking

- The Marco Island City Council voted to ban vehicle parking in the swales.

Traffic Congestion

- FDOT has identified projects for 2026 to eliminate congestion.

Collier Boulevard Widening Phase III

- The project is along Collier Boulevard between City Gate Boulevard North and Green Boulevard and involves widening Collier Boulevard from four to six lanes within the project limits. It includes realigning portions of the adjacent CR 951 Canal. The project is anticipated to complete design by mid-2025.
- The bus stop will be moved one block south and a traffic light will be added.

8. **Public Comments**
None

9. **Next Meeting Date** February 19, 2025 - 1:00 P.M.
Collier County Museum Lecture Hall
3331 Tamiami Trail E
Naples, FL. 34104

10. **Adjournment**
There being no further business for the good of the County, the meeting was adjourned by the chair at 1:33 P.M.

Public Transit Advisory Committee

John DiMarco III, Chair

These minutes approved by the Board/Committee on MARCH 19,2025 as presented X or as amended _____.

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

Mar 11, 2025

FOR IMMEDIATE RELEASE

Notice of Hybrid Remote Public Meeting
Collier County Tourist Development Council
Collier County, Florida

Mar 18, 2025
9:00 a.m.

Notice is hereby given that the **Collier County Tourist Development Council** will meet on **Tuesday, Mar 18,** at **9:00 a.m.** This will be a Hybrid Remote meeting and it will be held at the Board of County Commissioners Chambers, third floor, Collier County Government Center, 3299 Tamiami Trail E., Naples, Florida. Some of the Council members may be appearing remotely, with staff present in person. The public may participate either remotely or in person.

Individuals who would like to participate in person must complete and submit a speaker form prior to the beginning of the discussion about the item.

Individuals who would like to participate remotely should register at:
https://us02web.zoom.us/meeting/register/450yErCVQWimhf7IemqlUw

The deadline to participate remotely is Mar 17th. After registering, you will receive a confirmation email containing information about joining the meeting.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

About the public meeting:

Two or more members of the Board of County Commissioners, Coastal Advisory Committee, City of Naples City Council, and City of Marco Island City Council may be present and participate at the meeting. The subject matter of this meeting may be an item for discussion and action at future meetings of these Boards.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management

Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Buzzy Ford at (239) 252-2383.

###

COLLIER COUNTY
Tourist Development Council

NAPLES · MARCO ISLAND
EVERGLADES
PARADISECOAST.COM

AGENDA

Board of County Commission Chambers
Collier County Government Center
3299 Tamiami Trail East, 3rd Floor
Naples, FL 34112

March 18, 2025
9:00 AM

Commissioner Chris Hall, Chair
Clark Hill, Vice-Chair
Susan Becker
Laura Radler
Nancy Kerns
Michael McComas
Edward (Ski) Olesky
Council Member Bill Kramer
Councillor Darrin Palumbo

All interested parties are invited to attend and to register to speak and to submit their objections, if any, in writing to the Council prior to the meeting if applicable. For more information, please contact Jay Tusa at (239) 252-4040. If you are a person with a disability who needs any accommodation in order to participate in this proceeding, you are entitled, at no cost to you, to the provision of certain assistance. Please contact the Collier County Facilities Management Department located at 3335 Tamiami Trail East, Suite 101, Naples, FL 34112-5356, (239) 252-8380. Public comments will be limited to 3 minutes unless the Chairman grants permission for additional time. Collier County Ordinance No. 99-22 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners before the Board of County Commissioners and its advisory boards, register with the Clerk to the Board at the Board Minutes and Records Department.

About the public meeting:

Two or more members of the Board of County Commissioners, Coastal Advisory Committee, City of Naples City Council, and City of Marco Island City Council may be present and participate at the meeting. The subject matter of this meeting may be an item for discussion and action at future meetings of these Boards.

1. **Call to Order**

2. **Pledge of Allegiance**

3. **Roll Call**

4. **Agenda and Minutes**

   Approval of today's Regular, Consent, and Summary agenda as amended (ex-parte disclosure provided by Commission members for Consent agenda.)

   4.A. February 18, 2025 Meeting Minutes *(2025-863)*

5. **Tourism Director Report**

   5.A. Tourism Director update and TDT tax report *(2025-822)*

6. **Consent Agenda**

   All Matters listed under this agenda item are considered to be routine and action will be taken by one motion without separate discussion of each item. If discussion is desired by a member of the Council, that item will be moved from the Consent Agenda and considered separately under New Business or Old Business.

7. **New Business**

   7.A. Recommendation to approve a work order with APTIM Environmental & Infrastructure, LLC to provide professional engineering services for the 2025 Naples Beach Renourishment Project under Contract No. 18-7432-CZ for time and material not to exceed $149,010.40,and make a finding that this item promotes tourism (Fund 1105, Project No. 90068). *(2025-887)*

   7.B. Recommendation to approve a work order with APTIM Environmental & Infrastructure, LLC, to provide professional engineering services for 2026-2027 Local Government Funding Request, under Contract No. 18-7432-CZ, for time and material not to exceed $28,462, and make a finding that this item promotes tourism (Fund 1105, Project No. 90065). *(2025-888)*

   7.C. Recommendation to approve Change Order No. 3 for contract No. 24-8292 with Earth Tech Enterprises, Inc., for the Park Shore Beach Renourishment, increasing the contract amount by $7,000, and make a finding that this item promotes tourism (Project 90067). *(2025-889)*

   7.D. Recommendation to approve a work order with Humiston & Moore Engineers to provide professional engineering services for the 2025 Vanderbilt Beach Renourishment Project and 2025 Pelican Bay Beach Renourishment under Contract No. 18-7432-CZ, for time and material not to exceed $143,811, and make a finding

that this item promotes tourism (Fund 1105, Project No. 90066 and 50126). *(2025-890)*

8. Old Business

9. Ten Minute Break

10. Presentations

There are no public comments for these items. Presentations are scheduled by request of a Board member or as directed by the County Manager. Presenters are limited to ten (10) minutes unless extended by the Chair. (Resolution 98-167)

10.A. 2024 FBU National Championship Recap *(2025-849)*

10.B. PCSC Q1 Report FY24-25 *(2025-850)*

10.C. Lou Hammond Group presentation *(2025-847)*

10.D. Downs & St. Germain Highlights presentation *(2025-848)*

11. Agency Partner Reports

11.A. Agency Partner Reports *(2025-835)*

12. Tourism Staff Reports

12.A. Tourism Staff Reports *(2025-861)*

13. Council Member Discussion

14. Next Meeting Date

14.A. Next Meeting Date - April 15, 2025 *(2025-823)*

15. Adjourn

MINUTES OF THE COLLIER COUNTY
TOURIST DEVELOPMENT COUNCIL MEETING
BOARD OF COUNTY COMMISSION CHAMBERS
Naples, FL – Feb. 18, 2025

LET IT BE REMEMBERED the Collier County Tourist Development Council, in and for the County of Collier, having conducted business herein, met on this date 9:00 a.m. in REGULAR SESSION at 33299 Tamiami Trail East, 3rd floor, Naples, FL 34112 with the following members present:

Commissioner Chris Hall, Chair
Clark Hill, Vice Chair
City Council Member Darrin Palumbo
Susan Becker
Laura Radler (excused)
Nancy Kerns
City Council Member Michael McComas
Council Member Bill Kramer (excused)
Edward (Ski) Olesky (absent)

ALSO PRESENT:
Jay Tusa, CVB, Tourism Director
Sandra Rios, CVB, PR and Communications Manager
Colleen Greene, Collier County Attorney Office, Managing Assistant County Attorney
Buzzy Ford, CVB, Digital and Social Media Coordinator
Andy Miller, Collier County, Coastal Zone Manager
Amanda Townsend, Collier County, Museum Director
Erin Murphy, Lou Hammond Group, Account Supervisor, via ZOOM
Kristen Murphy, Paradise Advertising, VP Client Services & Partner Development
Leroy Bridges, ADARA, Senior Vice President of Sales
Joseph St. Germain, Downs & St. Germain, President via ZOOM
Enriqueta Balandra, Miles Partnership, Account Manager via ZOOM

Any person who decides to appeal a decision of the Tourist Development Council will need a record of the proceedings pertaining thereto, and therefore may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based, Neither Collier County nor the Tourist Development Council shall be responsible for providing this record.

1. **CALL TO ORDER**
2. **PLEDGE OF ALLEGIANCE**
3. **ROLL CALL**

4. APPROVAL OF TODAY'S AGENDA

Clark Hill motioned to approve the Agenda
Susan Becker seconded
Motion passed unanimously 6-0

4a. APPROVAL OF MINUTES JAN. 21, 2025, MEETING

Susan Becker motioned to approve the Minutes
Nancy Kerns seconded
Motion passed unanimously 6-0

5. TOURISM DIRECTOR REPORT

Jay Tusa, CVB, Tourism Director

- TDT collection for December was $3,465,278, resulting in a year-to-date total of $5,602,840. This is 4.5% down from FY 2024.
- December Visitor Numbers: Occupancy increased 4.4% year over year to 66.9%. The Average Daily Rate decreased 0.9% year over year, resulting in a revenue per available room of $234.14.
- Direct spending by visitors and total economic impact of tourism rose by 6.3% and 5.8% respectively.
- The total number of visitors increased by 5.1% compared to December of 2023 with visitors with 259,900 visitors. Visitors that stayed in hotels and resorts increased to 34% compared to 29% during the first quarter of 2023.
- International visitation is up 14% for the first quarter of the year with Canada showing an increase of 21.9% increase in Germany showing a 38.7% increase in the number of visitors for the year.
- The Board of County Commissioners at their February 11th meeting approved the two contracts for our international rep. firms for the UK and Germany.
- The Tourism Department recently moved under the direction of John Mullins, Division Director for Communications, Government and Public Affairs for Collier County Government. The department was previously under Dan Rodriguez and have been transitioning with his retirement.
- The 2 studies on Paradise Coast Sports Complex and Sun and Fun Lagoon are forthcoming. Sun and Fun in the next weeks and Paradise Coast Sports Complex in a couple of months.
- The Paradise Sports Complex is transitioning from the Tourism Department to Parks and Recreation.

6. CONSENT AGENDA

None

7. NEW BUSINESS

Andy Miller, Collier County, Coastal Zone Manager

A. Recommendation to approve Change Order No. 2 for contract No. 24-8292 with Earth Tech Enterprises, Inc., for the Park Shore Beach Renourishment, increasing the contract amount by $2,739,153, applying the Allowance of $254,000 and adding 30 days to the contract time; approve necessary budget amendments; and make a finding that this item promotes tourism (Project 50320 & 90067).

Item C. Recommendation to approve Change Order No. 1, adding $33,702.40 and 137 days to the Work Order under library contract 18-7432-CZ with APTIM Environmental & Infrastructure, LLC for the Park Shore Beach Renourishment; and make a finding that this item promotes tourism (Project 50320 & 90067).

- The survey on the Park Shore renourishment indicated that the Engineer's time and quantity of sand needed adjustment to fill the design template because of the Hurricanes. The change order for Earth Tech, the contractor, needed almost double the amount of sand and the Engineer needs to stay on board doubling the amount of time.
- The first recommendation is for the contractor and it's a recommendation to approve change order number two for the contract number 24-82 92 with Earth Tech Enterprises for Park Shore Beach renourishment and increasing the contract amount by $2,739,153, applying the allowance of $254,000 and adding 30 days to the contract time, approve the necessary budget amendment and make a finding that this item promotes tourism.

Chairman Hall moved to approve 7a and 7c
Darrin Palumbo seconded
Motion passed unanimously 6-0

B. **Recommendation to award Invitation to Bid ("ITB") No. 24-8323, in the amount of $1,178,500, to Earth Tech Enterprises, Inc., for the Collier County South Naples Emergency Berm truck haul & construction project, approve all necessary budget amendments, authorize the Chairman to sign the attached Agreement, and make a finding that this item promotes tourism. (Project 50280)**

- This for the last leg of the emergency berm. The project that was 400,000 tons of what we call the emergency berm, which is essentially rebuilding the berms that were destroyed by Hurricane Ian. And when we got to the final leg of the project, which was Port Royal, South Naples, we didn't have all the easements required to do the project for right of access.
- Since it was occurring in the heat of sea turtle nesting season, we told the contractor to stop. We did a separate bid because so much time had expired between the original stop work and start construction that we had to rebid the item.

Susan Becker moved to approve
Nancy Kerns seconded
Motion passed unanimously 6-0

8. OLD BUSINESS

8. A Recommendation to accept the report from the City of Naples Tourism Impact Study for the Stormwater Outfall Pipe Removal and Water Quality Project and make a finding that this project promotes tourism.

Bob Middleton, Public Works Director, City of Naples

- Those are 10 stormwater outfall projects that this project will remove. Eight of them are owned by the City, the other two will be removed as part of future development as these areas develop.
- The area we're looking at is Gulf Shore Boulevard between Second Avenue South and Oleander, which is just north of the current Beach Club project. It will also include a section along Third Street.
- Our current project is a gravity flow system. As storm water is collected off the streets and the properties in this area, it flows to the gulf through these outfalls by gravity. The problem with that is, is not as efficient during high tides during a period of high tide, they drain slower.
- The main design of this project is to construct two outfall pump stations, one at 8th Avenue North, and one at 3rd Avenue North. All that water would be collected and diverted to those pump stations. And instead of having the outfall gravity outfall pipes that discharge into the Gulf, there would be two outfall pipes.
- One from each pump station that will discharge 1500 feet out into the Gulf of Mexico. There'll be diffuser systems on both of those pipes to allow the water to be diffused over a large area, which is preferred by the Army Corps of Engineer and DEP, along with the improvements that we will be adding storm water in the boxes 78 to be exact. And those will include water quality features that will remove a particular matter that will reduce the nitrogen and nutrients from the, from the collected water before it's discharged into the Gulf of Mexico.
- It was determined that by improving water quality and flood protection will also increase foot traffic along Gulf Shore Blvd. and increase the resiliency. It will also increase the road elevation between 6" and 12".
- The removal of outfall projects, that's gonna be the big one to remove the outfalls. It'll be more attractive, more aesthetically pleasing to the residents that tour the beach.

Chairman Hall motioned to approve
Susan Becker seconded
Motion passed 5-1; **Michael McComas** opposed

9. BREAK

No break was taken

10. PRESENTATIONS

A. Downs & St. Germain

Joseph St. Germain, Downs & St. Germain, President **via ZOOM**

- The visitor metrics, with the exception of the average daily rate for December, were up year over year. The number of days in market was the biggest increase because the length of stay of the typical visitor in December was longer than the previous year. Overall direct spending of visitors to the area was over 260 million resulting of an economic impact of nearly 360 million.
- Occupancy was up even with more units available. That's why the room nights are up more than the occupancy. I know this is something that we wanted to point out because it's still one of our concerns. We have so many more hotels online. So, how do we increase occupancy when you have more units available. So that was good to see.
- Overall, the biggest increases year over year were sports related.

- First time visitation was down slightly.
- Slight decrease in people that would definitely recommend the area which is hard to keep high when your average daily rate is $350.00. That comes with a high level of expectation.

B. Paradise Advertising

Leroy Bridges, ADARA, Sr. VP of Sales

- We report on the tax collections, on who's coming, where they're coming from, on the attribution from the various media channels and partners.
- ADARA is a global entity, working and representing with hundreds of destinations. I'm a Floridian and my roots are in tourism marketing with the county government entity. I've been at ARA for a little over three and a half years, but presented to Council, similar to this for many years.
- We bring global consumer travel data together into one place to allow destinations to understand their marketing performance. We can't do what we do without withholding a very high privacy standard that is GDPR compliant, which is the highest level of, of privacy in the world.
- We bring all of this data together into one place to help understand that consumer and then provide measurable results on the other side. Literally, any traveler goes to a particular data partner site like Kayak, Marriott, Wyndham, any of these large groups and every brand that sits under those groups makes a search. We then see that data in real time.

Kristin Murphy, Paradise Advertising, VP Partner Development and Client Services

- We delivered ads during the disaster recovery campaign, that was about nine weeks long. December 9th through January 31st. This was the part of the additional funding that the TDC and the Board of County Commissioners approved for about $350,000 to remarket after the Hurricanes and help mitigate that impact.
- There are six media vendors that made up our plan based on the day that this report was generated. The ADARA impact shows $970,000 in hotel revenue.
- We are looking at providing a return on ad spend that's directly attributed to the ads and these are just the digital ads.
- Expedia also guaranteed transactions after exposure to the ads. You are looking at a total revenue of $9,257,611 with a spend of $335,000 on advertising. That's a $28 to 1 return on ad spend that is observed data, direct transactions that we can guarantee happened. But keep in mind how much bigger that number really is when you think about what's not tracked. We are very pleased with this campaign result.
- I want to commend Sandra and John for their strategy and collaborative support.

11. AGENCY PARTNER REPORTS

Lou Hammond Group, PR Agency

Erin Murphy via ZOOM

- In December, the media impressions were 52,550,055 which translated to a media value of $91,495.38.
- This is equating this to advertising what you would've spent for these placements that are earned for free because it is a value for both the publication and the destination.
- An example of a couple of the placements that we had beginning with Forbes. There are nine hotel packages “We wish we got for Christmas” and “On Fifth” is included with several direct

links to both the Forbes travel guide reviews and their guides, but also to the website itself to book that special offer Southern Living.
- We always love working with Miami Herald. This was published at the beginning of December, and it highlights the Ritz-Carlton and the JW Marriott, Marco Island.

Miles Partnership

Enriqueta Balandra, Miles Partnership, Account Manager, via ZOOM

- Over 140,000 website sessions and over 67,000 engaged sessions. We had increases in the 50% plus, month over month, which is following our historical trend.
- Our top pages across the traffic types; homepage coming in at number one, followed by beaches, events, arts and culture and holiday events in our top five. We also had the Snow Fest event page in there for the holidays in December.

Amanda Townsend, Museum Director

- At the Collier county Museum at Government Center we have the art of Phil Fisher. Phil's been painting in Naples for 53 years. We have several of his works in the museum collection, so we're really happy to feature his works. He has about 35 new paintings on display as well as some of the pieces that are in the museum collection.
- Our second Tuesday, April lecture, I'll be doing a deep dive into artifact spotlight, if you will, into his painting of Jim McMullen's Paint Panther Tracker, which is a painting that is in the museum collection.
- Roberts Ranch in connection with the upcoming cattle drive perspectives from Southwest Florida Ranch Life, Megan Watkins is a rancher and works and lives the life every day and is a photographer as well. The cattle drive is March 8th, and we are looking forward to another fun day that you just don't get to see very often anymore. We will bunch as many original Florida and illusionary oriented cattle that we can get our hands on, and we'll bring them to the rodeo grounds and march them up Main Street onto Roberts Avenue and onto Roberts property.
- Kaleidoscope Beer Company is brewing an orange blossom special beer and we'll be having a release of on Saturday. They will be donating a portion of the proceeds from every pint sold to the Friends of the Collier County Museum to benefit the Depot.

12. TOURISM STAFF REPORTS

13. COUNCIL MEMBER DISCUSSION

Chairman Hall

I encourage anyone with an opposing view to share it so we can all work together. So with the nay vote today, I wanted to hear why.

Michael McComas

It sounds like that project is a project, let me put it to you this way. I flood in Everglades City almost on a regular basis. And when these dollars go into a project, which I look at as being part of the City Council's responsibility out of their tax base, not sort of the general public's tax base, then I have concerns that we're walking into an area that I don't want to be in.

I don't think that when the State allocated these funds and to find the use of them, I mean we put the tagline for that it promotes tourism on everything we ever see. It sort of loses some meaning somewhere along the line. But to your point, that was the reason for the nay vote.

14. NEXT MEETING

March 18, 2025

15. ADJOURNED

There being no further business for the good of The County, the Tourist Development Council meeting was adjourned at 10:43 a.m.

COLLIER COUNTY

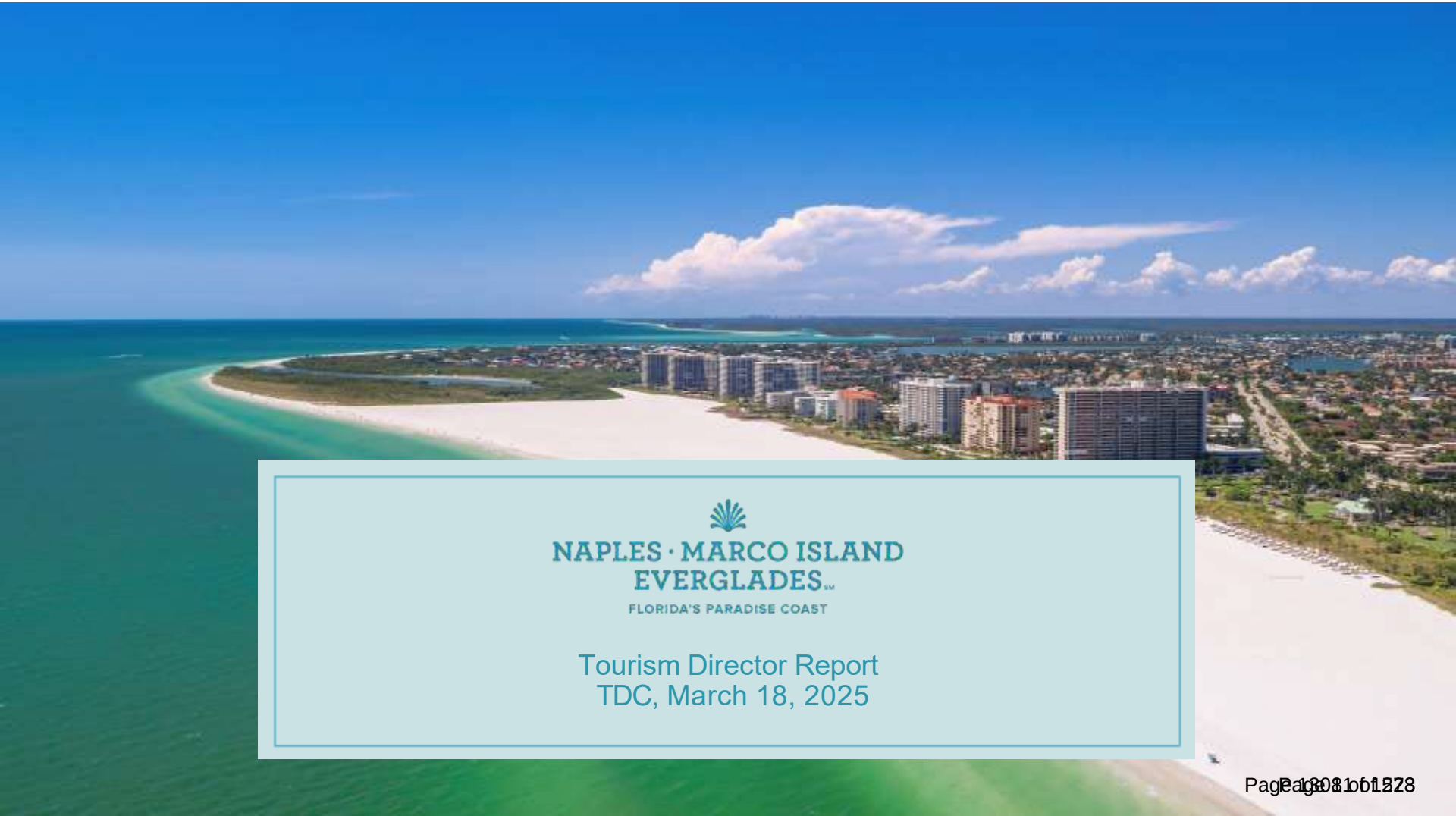
TOURIST DEVELOPMENT COUNCIL

The Minutes were approved by_____

Chairman Chris Hall

On date _____

as presented_____ or amended_____



NAPLES · MARCO ISLAND EVERGLADES℠

FLORIDA'S PARADISE COAST

Tourism Director Report
TDC, March 18, 2025

Tourism Director Report

January 2025 TDT Collection Report

- Tourist Development Tax Revenue for January 2025 was $4,632,779, resulting in a year-to-date total of $10,235,595.

January 2025 Monthly Visitor Snapshot

- Occupancy decreased by 1.5% year-over-year to 66.2%.
- Despite a 5.1% increase in occupied room nights year-over-year, this growth was outpaced by an increase in room supply, contributing to the 1.5% decline in occupancy.
- Average Daily Rate (ADR) dropped by 2.4% year-over-year to $485.57, resulting in a Revenue Per Available Room (RevPAR) of $321.45, a 3.9% decrease from January 2024.
- Direct spending by visitors increased by 1.6%, and the total economic impact of tourism grew by 1.3%.
- International visitors accounted for 19% of total visitation in January and have represented 15.5% of overall visitation for FY 2025 to date.

FISCAL YEAR (OCTOBER THRU SEPTEMBER) TOTALS

FEBRUARY 2025
FOR THE MONTH OF JANUARY 2025 VENDOR TAX COLLECTIONS

BREAKDOWN	FISCAL 2023-2024	FISCAL 2024-2025	DIFFERENCE	%
OVERALL COLLECTIONS (includes minor categories not shown below)				
Current Month	$4,409,360	$4,632,779	$223,419	5.06 %
Year to Date	$12,355,790	$12,216,043	- $139,747	-1.13 %
HOTEL / MOTEL				
Current Month	$2,640,878	$2,855,575	$214,697	8.13 %
Year to Date	$7,610,890	$7,752,384	$141,494	1.86 %
REALTORS				
Current Month	$534,335	$434,146	- $100,189	- 18.75 %
Year to Date	$870,265	$630,081	- $240,184	- 27.60 %
INDIVIDUALS (APTS/CONDOS S F HOMES)				
Current Month	$1,199,325	$1,293,088	$93,763	7.82 %
Year to Date	$3,700,049	$3,710,994	$10,945	0.30 %

FY 25 TDT Collections Report

31-Jan-2025

Fund Reporting	Fund	Adopted Budget	Updated Annual Forecast	Budgeted YTD	YTD Actual	Variance to Budgeted YTD
Beach Park Facilities	1100	1,357,700	1,449,621	274,519	366,479	91,961
TDC Promotion	1101	13,643,700	14,702,837	2,758,671	3,435,854	677,182
Non-County Museums	1103	724,300	773,338	146,449	195,253	48,804
TDC Admin	1104	-	-	0	-	-
Beach Renourishment	1105	14,782,800	15,783,651	2,988,990	3,989,644	1,000,654
Disaster Recovery	1106	-	-	0	-	-
County Museums	1107	2,000,000	2,000,000	404,388	786,396	382,009
TDC Capital	1108	5,415,500	5,782,150	1,094,980	1,461,968	366,987
	Gross Budget	**37,924,000**	**40,491,597**	**7,667,997**	**10,235,595**	**2,567,597**
	Less 5% Rev Res	(1,896,200)	6.77%		% Over/(Under) Bud	33.5%
	Net Budget	36,027,800				

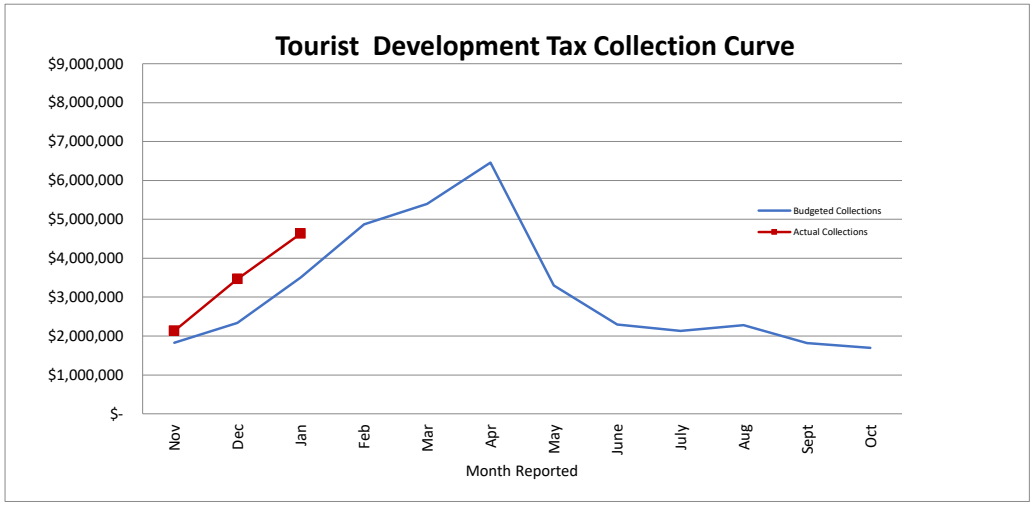
Collections

Month Reported	Actual	Cum YTD	% Budget Collected to Date	% Variance FY24 Collections	% Variance FY23 Collections	% Variance FY22 Collections
Nov	2,137,562	2,137,562	5.64%	-16.72%	-9.20%	-5.03%
Dec	3,465,253	5,602,815	14.77%	5.83%	30.93%	19.12%
Jan	4,632,779	10,235,595	26.99%	5.02%	24.82%	3.04%
Feb	-	10,235,595	26.99%	n/a	n/a	n/a
Mar	-	10,235,595	26.99%	n/a	n/a	n/a
Apr	-	10,235,595	26.99%	n/a	n/a	n/a
May	-	10,235,595	26.99%	n/a	n/a	n/a
June	-	10,235,595	26.99%	n/a	n/a	n/a
July	-	10,235,595	26.99%	n/a	n/a	n/a
Aug	-	10,235,595	26.99%	n/a	n/a	n/a
Sept	-	10,235,595	26.99%	n/a	n/a	n/a
Oct	-	10,235,595	26.99%	n/a	n/a	n/a
Total	**10,235,595**	**10,235,595**	**YTD**	**-0.16%**	**17.49%**	**6.01%**

40,491,597

Budget Comparison

	5 Yr History-Cum	5 Yr History-Monthly	Budgeted Collections	Actual Collections	Budget to Actual Variance	Updated Forecast
Nov	4.8%	4.8%	1,827,211	2,137,562	310,352	2,137,562
Dec	11.0%	6.2%	2,338,559	3,465,253	1,126,694	3,465,253
Jan	20.2%	9.2%	3,502,227	4,632,779	1,130,552	4,632,779
Feb	33.1%	12.8%	4,869,752	-	-	4,869,752
Mar	47.3%	14.2%	5,397,019	-	-	5,397,019
Apr	64.3%	17.0%	6,460,316	-	-	6,460,316
May	73.0%	8.7%	3,303,306	-	-	3,303,306
June	79.1%	6.1%	2,299,023	-	-	2,299,023
July	84.7%	5.6%	2,134,934	-	-	2,134,934
Aug	90.7%	6.0%	2,277,930	-	-	2,277,930
Sept	95.5%	4.8%	1,816,973	-	-	1,816,973
Oct	100.0%	4.5%	1,696,749	-	-	1,696,749
Total	100.0%	100.0%	**37,924,000**	**10,235,595**	**2,567,597**	**40,491,597**
			% over/(under) budget		33.5%	6.77%



FY 25 TDT Collections Report

31-Jan-2025

Fund Reporting	Fund	Adopted Budget	Updated Annual Forecast	Budgeted YTD	YTD Actual	Variance to Budgeted YTD
Beach Park Facilities	1100	1,357,700	1,449,621	274,519	366,479	91,961
TDC Promotion	1101	13,643,700	14,702,837	2,758,671	3,435,854	677,182
Non-County Museums	1103	724,300	773,338	146,449	195,253	48,804
TDC Admin	1104	-	-	0	-	-
Beach Renourishment	1105	14,782,800	15,783,651	2,988,990	3,989,644	1,000,654
Disaster Recovery	1106	-	-	0	-	-
County Museums	1107	2,000,000	2,000,000	404,388	786,396	382,009
TDC Capital	1108	5,415,500	5,782,150	1,094,980	1,461,968	366,987
	Gross Budget	**37,924,000**	**40,491,597**	**7,667,997**	**10,235,595**	**2,567,597**
	Less 5% Rev Res	(1,896,200)	6.77%		% Over/(Under) Bud	33.5%
	Net Budget	36,027,800				

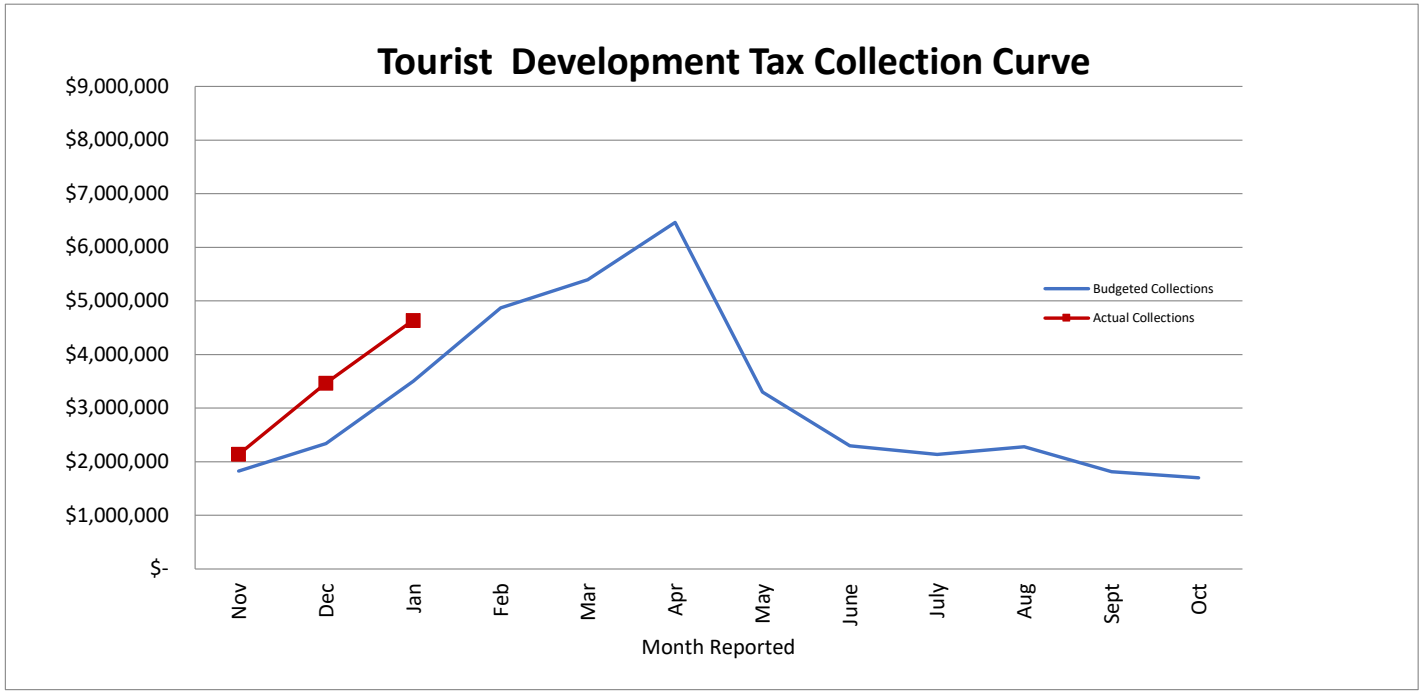
Collections

Month Reported	Actual	Cum YTD	% Budget Collected to Date	% Variance FY24 Collections	% Variance FY23 Collections	% Variance FY22 Collections
Nov	2,137,562	2,137,562	5.64%	-16.72%	-9.20%	-5.03%
Dec	3,465,253	5,602,815	14.77%	5.83%	30.93%	19.12%
Jan	4,632,779	10,235,595	26.99%	5.02%	24.82%	3.04%
Feb	-	10,235,595	26.99%	n/a	n/a	n/a
Mar	-	10,235,595	26.99%	n/a	n/a	n/a
Apr	-	10,235,595	26.99%	n/a	n/a	n/a
May	-	10,235,595	26.99%	n/a	n/a	n/a
June	-	10,235,595	26.99%	n/a	n/a	n/a
July	-	10,235,595	26.99%	n/a	n/a	n/a
Aug	-	10,235,595	26.99%	n/a	n/a	n/a
Sept	-	10,235,595	26.99%	n/a	n/a	n/a
Oct	-	10,235,595	26.99%	n/a	n/a	n/a
Total	**10,235,595**	**10,235,595**	**YTD**	**-0.16%**	**17.49%**	**6.01%**

40,491,597

Budget Comparison

	5 Yr History-Cum	5 Yr History-Monthly	Budgeted Collections	Actual Collections	Budget to Actual Variance	Updated Forecast
Nov	4.8%	4.8%	1,827,211	2,137,562	310,352	2,137,562
Dec	11.0%	6.2%	2,338,559	3,465,253	1,126,694	3,465,253
Jan	20.2%	9.2%	3,502,227	4,632,779	1,130,552	4,632,779
Feb	33.1%	12.8%	4,869,752	-	-	4,869,752
Mar	47.3%	14.2%	5,397,019	-	-	5,397,019
Apr	64.3%	17.0%	6,460,316	-	-	6,460,316
May	73.0%	8.7%	3,303,306	-	-	3,303,306
June	79.1%	6.1%	2,299,023	-	-	2,299,023
July	84.7%	5.6%	2,134,934	-	-	2,134,934
Aug	90.7%	6.0%	2,277,930	-	-	2,277,930
Sept	95.5%	4.8%	1,816,973	-	-	1,816,973
Oct	100.0%	4.5%	1,696,749	-	-	1,696,749
Total	100.0%	100.0%	**37,924,000**	**10,235,595**	**2,567,597**	**40,491,597**
			% over/(under) budget		33.5%	6.77%



Collier County Tax Collector - Tourist BOCC - Zone - TAX-53800 Report (Detailed Distribution Data) - Run 02/04/2025 09:25AM

Tourist Zone	Allocation Date (Year)	Allocation Date (Month)	Allocated	Distributed Amt	Distribution Category	Allocation Date
-- Any --		*-- January --*			*-- Tourist Tax --*	*-- 01/01/2025-01/31/202 5 --*
CC - Collier County - Unincorporated	**2025**	**January**	**2,693,732.79**	**2,693,732.79**	**Tourist Tax**	
EC - Everglades City	**2025**	**January**	**16,457.44**	**16,457.44**	**Tourist Tax**	
IM - Immokalee	**2025**	**January**	**3,312.24**	**3,312.24**	**Tourist Tax**	
MI - Marco Island	**2025**	**January**	**1,073,819.81**	**1,073,819.81**	**Tourist Tax**	
NA - Naples	**2025**	**January**	**845,457.07**	**845,457.07**	**Tourist Tax**	
CC - Collier County - Unincorporated, EC - Everglades City, IM - Immokalee, MI - Marco Island, NA - Naples	***2025***	***January***	***4,632,779.35***	***4,632,779.35***	***Tourist Tax***	***Grand Total***

Collier County Tax Collector - Tourist BOCC - Zone - TAX-53800 Report (Detailed Distribution Data) - Run 02/04/2025 09:24AM

Tourist Zone	Allocation Date (Year)	Allocation Date (Month)	Allocated	Distributed Amt	Distribution Category	Allocation Date
-- Any --		*-- Any --*			*-- Tourist Tax --*	*-- 10/01/2024-01/31/202 5 --*
CC - Collier County - Unincorporated	2024	October	1,251,054.38	1,251,054.38	Tourist Tax	
CC - Collier County - Unincorporated	2024	November	1,329,812.49	1,329,812.49	Tourist Tax	
CC - Collier County - Unincorporated	2024	December	2,077,169.22	2,077,169.22	Tourist Tax	
CC - Collier County - Unincorporated	**2024**	**December, November, October**	**4,658,036.09**	**4,658,036.09**	**Tourist Tax**	
CC - Collier County - Unincorporated	**2025**	**January**	**2,693,732.79**	**2,693,732.79**	**Tourist Tax**	
CC - Collier County - Unincorporated		**December, January, November, October**	**7,351,768.88**	**7,351,768.88**	**Tourist Tax**	
EC - Everglades City	2024	October	4,757.68	4,757.68	Tourist Tax	
EC - Everglades City	2024	November	7,360.57	7,360.57	Tourist Tax	
EC - Everglades City	2024	December	11,077.57	11,077.57	Tourist Tax	
EC - Everglades City	**2024**	**December, November, October**	**23,195.82**	**23,195.82**	**Tourist Tax**	
EC - Everglades City	**2025**	**January**	**16,457.44**	**16,457.44**	**Tourist Tax**	
EC - Everglades City		**December, January, November, October**	**39,653.26**	**39,653.26**	**Tourist Tax**	
IM - Immokalee	2024	October	2,657.82	2,657.82	Tourist Tax	
IM - Immokalee	2024	November	2,938.49	2,938.49	Tourist Tax	
IM - Immokalee	2024	December	4,398.84	4,398.84	Tourist Tax	
IM - Immokalee	**2024**	**December, November, October**	**9,995.15**	**9,995.15**	**Tourist Tax**	
IM - Immokalee	**2025**	**January**	**3,312.24**	**3,312.24**	**Tourist Tax**	
IM - Immokalee		**December, January, November, October**	**13,307.39**	**13,307.39**	**Tourist Tax**	
MI - Marco Island	2024	October	495,411.75	495,411.75	Tourist Tax	
MI - Marco Island	2024	November	461,052.08	461,052.08	Tourist Tax	

Collier County Tax Collector - Tourist BOCC - Zone - TAX-53800 Report (Detailed Distribution Data) - Run 02/04/2025 09:24AM

Tourist Zone	Allocation Date (Year)	Allocation Date (Month)	Allocated	Distributed Amt	Distribution Category	Allocation Date
MI - Marco Island	2024	December	819,306.83	819,306.83	Tourist Tax	
MI - Marco Island	**2024**	**December, November, October**	**1,775,770.66**	**1,775,770.66**	**Tourist Tax**	
MI - Marco Island	**2025**	**January**	**1,073,819.81**	**1,073,819.81**	**Tourist Tax**	
MI - Marco Island		**December, January, November, October**	**2,849,590.47**	**2,849,590.47**	**Tourist Tax**	
NA - Naples	2024	October	226,478.94	226,478.94	Tourist Tax	
NA - Naples	2024	November	336,398.69	336,398.69	Tourist Tax	
NA - Naples	2024	December	553,325.46	553,325.46	Tourist Tax	
NA - Naples	**2024**	**December, November, October**	**1,116,203.09**	**1,116,203.09**	**Tourist Tax**	
NA - Naples	**2025**	**January**	**845,457.07**	**845,457.07**	**Tourist Tax**	
NA - Naples		**December, January, November, October**	**1,961,660.16**	**1,961,660.16**	**Tourist Tax**	
CC - Collier County - Unincorporated, EC - Everglades City, IM - Immokalee, MI - Marco Island, NA - Naples	***Grand Total***	***December, January, November, October***	***12,215,980.16***	***12,215,980.16***	***Tourist Tax***	

Collier County Tax Collector - Tourist BOCC - Rental Type Report (Detailed Distribution Data) - Run 02/04/2025 09:17AM

Tourist Rental Type	Allocation Date (Month)	Allocated	Distributed Amt	Distribution Category	Allocation Date
-- Any --	*-- Any of: January --*			*-- Tourist Tax --*	*-- 01/01/2025-01/31/202 5 --*
02 - CONDOMINIUM	**January**	**287,321.98**	**287,321.98**	**Tourist Tax**	
05 - HOTEL	**January**	**2,855,575.15**	**2,855,575.15**	**Tourist Tax**	
06 - INTERVAL OWNER	**January**	**24,469.69**	**24,469.69**	**Tourist Tax**	
07 - MOBILE HM PARK	**January**	**2,821.70**	**2,821.70**	**Tourist Tax**	
09 - PROPERTY MANAGEMENT COMPANY	**January**	**434,145.63**	**434,145.63**	**Tourist Tax**	
12 - RV PARK /CAMPGD	**January**	**22,679.38**	**22,679.38**	**Tourist Tax**	
13 - SINGLE FAMILY	**January**	**1,005,765.82**	**1,005,765.82**	**Tourist Tax**	
02 - CONDOMINIUM, 05 - HOTEL, 06 - INTERVAL OWNER, 07 - MOBILE HM PARK, 09 - PROPERTY MANAGEMENT COMPANY, 12 - RV PARK /CAMPGD, 13 - SINGLE FAMILY	***January***	***4,632,779.35***	***4,632,779.35***	***Tourist Tax***	***Grand Total***

Collier County Tax Collector - Tourist BOCC - Rental Type Report (Detailed Distribution Data) - Run 02/04/2025 09:35AM

Tourist Rental Type	Allocation Date (Month)	Allocated	Distributed Amt	Distribution Category	Allocation Date
-- Any --	*-- Any of: --*			*-- Tourist Tax --*	*-- 10/01/2024-01/31/202 5 --*
01 - APARTMENTS	**October**	**113.17**	**113.17**	**Tourist Tax**	**10/11/2024**
02 - CONDOMINIUM	January	287,321.98	287,321.98	Tourist Tax	
02 - CONDOMINIUM	October	81,224.40	81,224.40	Tourist Tax	
02 - CONDOMINIUM	November	57,047.69	57,047.69	Tourist Tax	
02 - CONDOMINIUM	December	123,047.99	123,047.99	Tourist Tax	
02 - CONDOMINIUM	**December, January, November, October**	**548,642.06**	**548,642.06**	**Tourist Tax**	
05 - HOTEL	January	2,855,575.15	2,855,575.15	Tourist Tax	
05 - HOTEL	October	1,090,686.73	1,090,686.73	Tourist Tax	
05 - HOTEL	November	1,405,067.56	1,405,067.56	Tourist Tax	
05 - HOTEL	December	2,401,054.30	2,401,054.30	Tourist Tax	
05 - HOTEL	**December, January, November, October**	**7,752,383.74**	**7,752,383.74**	**Tourist Tax**	
06 - INTERVAL OWNER	January	24,469.69	24,469.69	Tourist Tax	
06 - INTERVAL OWNER	October	16,647.27	16,647.27	Tourist Tax	
06 - INTERVAL OWNER	November	14,377.09	14,377.09	Tourist Tax	
06 - INTERVAL OWNER	December	25,418.42	25,418.42	Tourist Tax	
06 - INTERVAL OWNER	**December, January, November, October**	**80,912.47**	**80,912.47**	**Tourist Tax**	
07 - MOBILE HM PARK	January	2,821.70	2,821.70	Tourist Tax	
07 - MOBILE HM PARK	October	580.49	580.49	Tourist Tax	
07 - MOBILE HM PARK	November	1,087.15	1,087.15	Tourist Tax	
07 - MOBILE HM PARK	December	1,636.88	1,636.88	Tourist Tax	
07 - MOBILE HM PARK	**December, January, November, October**	**6,126.22**	**6,126.22**	**Tourist Tax**	

Collier County Tax Collector - Tourist BOCC - Rental Type Report (Detailed Distribution Data) - Run 02/04/2025 09:35AM

Tourist Rental Type	Allocation Date (Month)	Allocated	Distributed Amt	Distribution Category	Allocation Date
09 - PROPERTY MANAGEMENT COMPANY	January	434,145.63	434,145.63	Tourist Tax	
09 - PROPERTY MANAGEMENT COMPANY	October	35,604.14	35,604.14	Tourist Tax	
09 - PROPERTY MANAGEMENT COMPANY	November	57,918.16	57,918.16	Tourist Tax	
09 - PROPERTY MANAGEMENT COMPANY	December	102,412.59	102,412.59	Tourist Tax	
09 - PROPERTY MANAGEMENT COMPANY	**December, January, November, October**	**630,080.52**	**630,080.52**	**Tourist Tax**	
12 - RV PARK /CAMPGD	January	22,679.38	22,679.38	Tourist Tax	
12 - RV PARK /CAMPGD	October	3,739.68	3,739.68	Tourist Tax	
12 - RV PARK /CAMPGD	November	2,072.30	2,072.30	Tourist Tax	
12 - RV PARK /CAMPGD	December	6,817.01	6,817.01	Tourist Tax	
12 - RV PARK /CAMPGD	**December, January, November, October**	**35,308.37**	**35,308.37**	**Tourist Tax**	
13 - SINGLE FAMILY	January	1,005,765.82	1,005,765.82	Tourist Tax	
13 - SINGLE FAMILY	October	751,764.69	751,764.69	Tourist Tax	
13 - SINGLE FAMILY	November	599,992.37	599,992.37	Tourist Tax	
13 - SINGLE FAMILY	December	804,890.73	804,890.73	Tourist Tax	
13 - SINGLE FAMILY	**December, January, November, October**	**3,162,413.61**	**3,162,413.61**	**Tourist Tax**	
01 - APARTMENTS, 02 - CONDOMINIUM, 05 - HOTEL, 06 - INTERVAL OWNER, 07 - MOBILE HM PARK, 09 - PROPERTY MANAGEMENT COMPANY, 12 - RV PARK /CAMPGD, 13 - SINGLE FAMILY	***December, January, November, October***	***12,215,980.16***	***12,215,980.16***	***Tourist Tax***	***Grand Total***

Executive Summary

Recommendation to approve a work order with APTIM Environmental & Infrastructure, LLC to provide professional engineering services for the 2025 Naples Beach Renourishment Project under Contract No. 18-7432-CZ for time and material not to exceed $149,010.40,and make a finding that this item promotes tourism (Fund 1105, Project No. 90068).

OBJECTIVE: To move forward with professional Engineering Services for the 2025 Naples Beach Renourishment Project.

CONSIDERATIONS: Naples beach from approximately Doctors Pass to 18th Avenue South is planned to be renourished in the fall of 2025. An estimated 100,000 cubic yards of sand will be imported from the upland sand mine in Immokalee via truck haul and placed on the beach to provide protection from erosion as well as additional recreational area for visitors to the beach. APTIM Environmental & Infrastructure, LLC will assist the County in conducting beach renourishment activities on Naples Beach from FDEP reference monuments R-58A to R-79. This work order will provide professional services including engineering design, preparation of construction plans and technical specifications, bidding services, coordination with permitting agencies for Notice to Proceed, and serving as the Engineer of Record for the construction event.

This item is consistent with the Quality of Place Objectives of the County's Strategic Plan.

ADVISORY COMMITTEE RECOMMENDATIONS: This item will be presented to the Coastal Advisory Committee (CAC) on March 13, 2025, and the Tourist Development Council (TDC) on March 18, 2025.

FISCAL IMPACT: Funding in the amount of $149,010.40 is available within Tourist Development Tax Beach Renourishment Fund (1105), Project 90068 (County/Naples Beach Monitoring). The source of funding is Tourist Development Tax.

LEGAL CONSIDERATIONS: This item is approved as to form and legality and requires majority vote for approval. – CMG

RECOMMENDATIONS: To approve a work order with APTIM Environmental & Infrastructure, LLC to provide professional engineering services for 2025 Naples Beach Renourishment Project under Contract No. 18-7432-CZ for time and material not to exceed $149,010.40, and make a finding that this item promotes tourism (Fund 1105, Project No. 90068).

PREPARED BY: Andrew Miller, P.E., Coastal Zone Management, Capital Project Planning, Impact Fees, and Program Management Division

ATTACHMENTS:

1. WO - APTIM - Naples Beach Renourishment

WORK ORDER/PURCHASE ORDER

Contract 18-7432-CZ "Professional Services Library- Coastal Engineering Category"
Contract Expiration Date: March 9, 2026

This Work Order is for professional Engineering services for work known as:

Project Name: 2025 Naples Beach Renourishment
Project No: 90068.1

The work is specified in the proposal dated January 31, 2025 which is attached hereto and made a part of this Work Order. In accordance with Terms and Conditions of the Agreement referenced above, this Work Order/Purchase Order is assigned to: APTIM Environmental & Infrastructure, LLC

Scope of Work: As detailed in the attached proposal and the following:

* Task 1 Pre-Construction Survey
* Task 2 Design, Construction Plans & Specifications
* Task 3 Bidding Assistance & Notice to Proceed
* Task 4 Engineer of Record

Schedule of Work: Complete work within 270 days from the date of the Notice to Proceed which is accompanying this Work Order. The Consultant agrees that any Work Order that extends beyond the expiration date of Agreement # 18-7432-CZ will survive and remain subject to the terms and conditions of that Agreement until the completion or termination of this Work Order.

Compensation: In accordance with the Agreement referenced above, the County will compensate the Firm in accordance with following method(s): ☒Negotiated Lump Sum (NLS) ☐Lump Sum Plus Reimbursable Costs (LS+RC) ☐Time & Material (T&M) (established hourly rate – Schedule A) ☐ Cost Plus Fixed Fee (CPFF), (define which method will be used for which tasks) as provided in the attached proposal.

Task 1	$42,467.80
Task 2	$35,203.00
Task 3	$9,270.80
Task 4	$62,068.80
TOTAL FEE	$149,010.40

PREPARED BY: MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.26 15:18:43 -05'00' _____ _____
Andrew Miller, Coastal Zone Manager — Date

APPROVED BY: Anthony Khawaja P.E. Digitally signed by Anthony Khawaja P.E. Date: 2025.02.27 12:35:54 -05'00' _____ _____
Jay Ahmad, Director Transportation Engineering — Date

APPROVED BY: AhmadJay Digitally signed by AhmadJay Date: 2025.03.07 14:15:40 -05'00' _____ _____
Trinity Scott, Department Head — Date

CAO

By the signature below, the Firm (including employees, officers and/or agents) certifies, and hereby discloses, that, to the best of their knowledge and belief, all relevant facts concerning past, present, or currently planned interest or activity (financial, contractual, organizational, or otherwise) which relates to the proposed work; and bear on whether the Firm has a potential conflict have been fully disclosed.

Additionally, the Firm agrees to notify the Procurement Director, in writing within 48 hours of learning of any actual or potential conflict of interest that arises during the Work Order and/or project duration.

ACCEPTED BY: APTIM Environmental & Infrastructure, LLC

Jeffrey Andrews Digitally signed by Jeffrey Andrews Date: 2025.03.06 11:52:42 -05'00'

Jeffrey Andrews, Director

Date

(Remainder of page intentionally left blank)

CAO

Page 182 of 1328

IN WITNESS WHEREOF, the parties hereto, have each, respectively, by an authorized person or agent, have executed this Work Order on the date and year first written below.

ATTEST:
, Clerk of Courts

By: _____

Dated: _____
(SEAL)

_____
First Witness

_____
↑Type/print witness name↑

_____
Second Witness

_____
↑Type/print witness name↑

Approved as to Form and Legality:

CMB

_____
Assistant County Attorney

_____
Print Name

BOARD OF COUNTY COMMISSIONERS
COLLIER COUNTY, FLORIDA

By: _____
Burt L. Saunders, Chairman

APTIM Environmental & Infrastructure, LLC

By: Jeffrey Andrews Digitally signed by Jeffrey Andrews Date: 2025.03.06 12:55:58 -05'00'
_____
Signature

_____
↑Type/print signature and title↑

CAO

APTIM
6401 Congress Avenue, Suite 140
Boca Raton, FL 33487
Tel: +1 561 391 8102
www.aptim.com

January 31, 2025

Andy Miller
Collier County Coastal Zone Management
2685 S. Horseshoe Drive, Unit 103
Naples, FL 34104

Re: Engineering Services for 2025 Naples Beach Renourishment Project (Contract No. 18-7432-CZ)

Dear Andy:

This letter is in response to Collier County's (County) request for a proposal for Aptim Environmental & Infrastructure, LLC (APTIM) to support the County in conducting beach renourishment activities on Naples Beach (R58A-R79) beaches. APTIM will perform professional services including pre-construction survey, engineering design, preparation of construction plans and technical specifications, coordination with permitting agencies for a Notice to Proceed, and serve as the Engineer of Record for the construction event.

Included as Exhibits are: the Scope of Work (Exhibit A), Fee Proposal (Exhibit B), and the Rate Schedule (Exhibit C). APTIM proposes to provide these services on a lump sum basis with a cost of $149,010.40 under the terms and conditions of the existing Contract No. 18-7432-CZ and as amended May 7, 2020. Barring any unforeseen circumstances, all work will be completed within 270 days of receiving the Notice to Proceed.

Sincerely,

Nicole S. Sharp, P.E.
Director, Coastal Sciences & Engineering
Aptim Environmental & Infrastructure, LLC

cc: James Austin, P.E., APTIM
Steve Keehn, P.E., APTIM

CAO

APTIM

Exhibit A

Scope of Work

CAO

EXHIBIT A
SCOPE OF WORK
2025 NAPLES BEACH RENOURISHMENT PROJECT
COLLIER COUNTY, FL
JANUARY 2025

Introduction

This is a scope of work for Aptim Environmental & Infrastructure, LLC (APTIM) to provide the engineering services described below to support the County in preparing the pre-construction survey, design, plans and specifications, bidding, construction & permit documents for conducting a truck haul beach renourishment project on Naples Beach (R-58A to R-79).

This proposal contains the tasks necessary to bring the project through construction. APTIM will assist the County in preparing for construction by conducting analyses to determine project extents and volumes, producing construction plans and technical specifications, coordinating with FDEP for Notice to Proceed, and providing bidding assistance to the County. APTIM will support the County's inspection efforts during construction and will develop the post-construction certification based largely on the surveys, reports and observation of the contractor and the County during construction.

1. Pre-Construction Survey

This task includes pre-construction survey services for 204 profiles from R-58A-500 to R-79. This includes 25 Depth of Closure (DOC) lines at FDEP monuments and necessary intermediates, as well as 179 upland and wading depth lines at 100' spacing between FDEP monuments. The 179 upland and wading depth lines will extend seaward to 150' past the construction toe of fill, and will at least extend landward of the landward limit of fill.

Prior to the start of the survey, reconnaissance of published National Geodetic Survey (NGS) and/or FDEP 2nd order control monuments will be conducted to confirm that survey control is in place and undisturbed. Global Navigation Satellite System (GNSS) techniques will be used to locate and confirm survey control for this project.

Horizontal and vertical positioning checks will be conducted at the beginning and end of each survey day using at least two (2) 2nd order monuments or TBMs in the project area. All survey data collected will meet the vertical accuracy required for this survey as outlined in FDEP monitoring standards of 0.16' US survey feet.

The horizontal positions will be collected in United States (U.S.) survey feet relative to the North American Datum of 1983/1990 (NAD 83/90), FIPS Florida East (0901) State Plane. All vertical data will be collected in U.S. survey feet relative to the North American Vertical Datum of 1988 (NAVD 88).

Surveyors will collect upland and nearshore portions of the cross-section using GNSS rovers. Offshore sections of the profiles will be collected using an Teledyne Marine E20 sounder with digitizer on the survey vessel, with a centrally located hull-mounted transducer. A Trimble GNSS and a dynamic motion sensor (or similar) will be used onboard the survey vessel to provide instantaneous tide corrections as well as attitude corrections. To maintain the vessel navigation

CAO

along the profile lines, HYPACK navigation software will be used for real time navigation and data acquisition.

The sounder will be calibrated with a sound velocity probe and conventional bar-check at the beginning and end of each survey day. Bar-checks will be performed as a redundant calibration from a depth of five (5) feet to a minimum depth of twenty (20) feet. Tide readings will be taken while conducting the onshore portion of the profile to verify onboard tide readings.

All work shall be conducted under the direct supervision of a licensed Florida Professional Surveyor and Mapper as well as an American Congress of Surveying and Mapping Certified Hydrographer and will be in accordance with Chapter 5J-17 Florida Administrative Code (F.A.C.) pursuant to Chapter 472 of the Florida Statutes (FS) as well as the May 2014 FDEP Monitoring Standards for Beach Erosion Control Projects, Sections 01000 and 01100.

Deliverables for this task will include XYZ ASCII data and a pdf of profile plots.

2. Design, Construction Plans & Specifications

APTIM engineers will perform engineering analysis to determine project extents and estimate volumes needed. The goal of the design will be to place material so that the project area will be able to absorb 5 to 6 years of typical erosion in order to last until the next major nourishment project, barring any major storm events. The design will be based on the matrix design method updated with the latest composite erosion rate and 2025 pre-construction survey. After review of the preliminary volume estimates, an analysis will be conducted to optimize placement areas and volumes. APTIM will finalize the quantities and fill areas based on consultation with Collier County and permitting agencies. APTIM will support the County with one coordination meeting related to the project with local stakeholders.

APTIM will consult with permit agencies and their consultants, about the newest permit conditions. This will include Specific Conditions described in the November 2017 FDEP Permit No. 0331817-004-JM., which include

- Fill history and incremental volume analysis
- Refine beach design to avoid or minimize hardbottom impacts based on the latest physical and biological monitoring surveys.

Once the target volumes and placement areas have been approved by the County, APTIM will conduct engineering design work to prepare the construction templates. APTIM's GIS/CAD professionals will work directly with APTIM engineers to update the construction plans including plan views and cross-sections of project areas, beach access, equipment storage areas, environmental protection areas and other information required for execution of this project.

The construction plans and volumes for bidding will be based on the 2025 pre-construction surveys performed by APTIM (Task 1). Technical specifications developed for the project will integrate the QA/QC plans, environmental standards, and permit conditions into the work. APTIM will assist the County in preparation of the environmental protection plan, which will be integrated into the bidding documents.

APTIM understands that time is of the essence on this truck haul renourishment project and will have plans, specifications and bidding documents prepared 50 days after receipt of NTP to allow

beach renourishment to begin by 11/1/2025, provided that required documentation such as survey data from others and County approvals are received in a timely manner to proceed with the work.

3. Bidding Assistance & Notice to Proceed

Once the construction plans and technical specifications are completed, APTIM will provide the FDEP all items necessary to request a Notice to Proceed (NTP) and provide the County with a bid package containing: construction plans, technical specifications, project permits, bid form, contractor questionnaire, and engineer's opinion of probable costs. The questionnaire will be integrated into the technical specifications.

APTIM will assist the County in their lead of the bidding process. APTIM will participate in the Pre-Bid Meeting via phone conference, and assist the County in answering technical questions as needed during the bidding process. Once the bids have been opened, APTIM will assist the County in reviewing the bids and provide a recommendation to the County based on a review of the submitted bids.

4. Engineer of Record

As the Engineer of Record, APTIM will conduct pre-, during- and post-construction tasks necessary for certification of the project. An APTIM engineer will attend the pre-construction conference and update the construction profiles using the pre-construction surveys (Task 1). During construction, APTIM will support the County's inspection efforts and perform weekly site visits to inspect the work and attend weekly construction meetings. It is assumed that there will be up to 10 weeks of active hauling during construction. APTIM will prepare a QA/QC check list, delineating the County, contractor, inspector and APTIM duties as a guideline for during construction coordination.

APTIM will prepare a post-construction certification to meet permit requirements, based largely on surveys, weight tickets, daily reports and observations made by the contractor and County inspectors. APTIM will also provide a construction and as-built summary based on the contractor's as-built drawings. It is assumed that the annual physical monitoring survey and engineering report will be contracted by the County under separate work order. The third party's annual monitoring report will serve as the post-construction report and may include APTIM's as-built summary as an appendix.

APTIM will review the contractor's pay applications, reconcile and/or review the pay volumes/tonnage based on mine records, weights tickets collected at the beach and physical surveys.

Summary

This work will be performed on a lump sum (LS) basis with a cost of $149,010.40 as outlined in the attached fee spreadsheet. The overall time of the contract to complete the surveys, design, construction administration, and Engineer of Record signoff will be within 270 days of receipt of the Notice to Proceed.

Assumptions

- Dune restoration and dune vegetation are not part of this work assignment.

- County inspectors will collect weight tickets, observe delivered sand quality and beach construction, and reconcile sand mine records with weight tickets collected at the beach.
- The County or a third party will perform and prepare reports on the following tasks:
  - 2026 Physical Monitoring
  - Turbidity Monitoring
  - Biological Monitoring and Hardbottom Edge Surveys
  - Submerged Aquatic Vegetation Surveys
  - Marine Turtle Monitoring and Related FWC Coordination
  - Shorebird Monitoring

APTIM

Exhibit B

Fee Proposal

CAO

EXHIBIT B

ESTIMATED FEE PROPOSAL FOR
2025 Naples Beach Renourishment Project
Collier County

January 29, 2025

	Task Item	Cost	LABOR COSTS												TRAVEL COSTS			Equipment							
			Principal (Hours)	Senior Project Manager (Hours)	Engineer (Hours)	Senior Marine Biologist/ Hydrogeologist (Hours)	Marine Biologist/ Hydrogeologist (Hours)	Senior GIS Specialist (Hours)	CADD Technician (Hours)	Surveyor and Mapper (Hours)	Senior Scientist/ Geologist (Hours)	Scientist/ Geologist (Hours)	Survey Crew - 2 man (Hours)	Survey Crew - 3 man	Clerical/ Administrative (Hours)	Mileage	Tolls	Meals	Survey Boat 24' (Days)	RTK GPS (Days)	Heave, Pitch & Roll Compensator (Days)	Speed of Sound Velocity Meter (Days)	Hypack/ Hysweep Navigation System (Days)	Odom Hydrotrac Sounder (Days)	Digital Camera (Days)	UTV and Trailer Rental (Days)
1	Pre-Construction Survey	$42,467.80	1		1					10			40	148		440	4	36	1	8	1	1	1	1	8	8
2	Design, Construction Plans & Specifications	$35,293.00	22	24	110	16	10	4	56	2	2	1			2											
3	Bidding Assistance & Notice to Proceed	$9,270.80	16	4	20	6			8						1	440	2	4								
4	Engineer of Record	$62,068.80	32	52	230	24	12	4	50	8					4	2,640	18	18								
		Total Hours =	71	80	361	46	22	8	114	20	2	1	40	148	7	3,520	24	58	1	8	1	1	1	1	8	8
		Rate =	$231	$203	$130	$145	$120	$155	$107	$125	$153	$115	$145	$180	$73	$0.445	$12.00	$36.00	$790.000	$495.00	$215.00	$63.000	$260.00	$165.00	$10.00	$168.00
		Cost =	$16,401	$16,240	$46,930	$6,670	$2,640	$1,240	$12,198	$2,500	$306	$115	$5,800	$26,640	$511	$1,566.40	$288.00	$2,088.00	$790.00	$3,960.00	$215.00	$63.00	$260.00	$165.00	$80.00	$1,344.00
	LUMP SUM TOTAL	$149,010.40																								

CAO

APTIM

Exhibit C

Rate Schedule

CAO

* * * * *

SCHEDULE B-ATTACHMENT 1

RATE SCHEDULE

Title	Hourly Rate
Principal	**$231**
Senior Project Manager	**$203**
Project Manager	**$160**
Senior Engineer	**$177**
Engineer	**$130**
Senior Inspector	**$126**
Inspector	**$93**
Senior Planner	**$150**
Planner	**$120**
Senior Designer	**$140**
Designer	**$105**
Environmental Specialist	**$120**
Senior Environmental Specialist	**$167**
Scientist/Geologist	**$115**
Senior Scientist/Geologist	**$153**
Marine Biologist/Hydrogeologist	**$120**
Senior Marine Biologist/Hydrogeologist	**$145**
Senior GIS Specialist	**$155**
GIS Specialist	**$115**
Clerical/Administrative	**$73**
Senior Technician	**$103**
Technician	**$83**
Surveyor and Mapper	**$125**
CADD Technician	**$107**
Survey Crew - 2 man	**$145**
Survey Crew - 3 man	**$180**
Survey Crew - 4 man	**$215**
Senior Architect	**$160**
Architect	**$125**

The above hourly rates are applicable to Time and Materials task(s) only. The above list may not be all inclusive. Hourly rates for additional categories required to provide particular project services shall be mutually agreed upon by the County and firm, in writing, on a project by project basis, as needed, and will be set forth in the Work Order agreed upon by the parties.

☒ **Grant Funded**: The above rates are for purposes of providing estimate(s), as required by the grantor agency.

* * * * *

CAO

CAO

Collier County
Procurement Services Division

Direct Select Form

Request Date	Contract No.	Proposal Cost Estimate	Construction Cost Estimate
1/21/25	18-7432-CZ	$150,000	$5M

Requested By (*Use name as it appears in Outlook*):	Division / Department:
Andrew Miller	Transportation Mgmt Svcs

Administrative Agent (*If different from Requestor*):

Library Category:	Vendor Name:
Coastal Zone	Aptim Envrironmental & Infrastructure, LLC

Work Assignment Title: 2025 Naples Beach Renourishment Design

Description of Requested Services:

Professional engineering services for the design, bidding, permitting, and construction administration for 2025 Naples Beach Renourishment.

Justification: (*Select all that apply and explain below*)	
	☑ Past experience with project
	☐ Continuation of previous work assignment
	☑ Unique qualifications
	☐ Other

Comments / Explanation of Direct Select:

APTIM has designed multiple County beach renourishment projects and are very experienced with the requirements for permitting and design needed to accomplish this project on an accelerated time frame for a November 2025 construction start. Reference PO 4500231654.

Requestor: Andrew Miller	**Signature:** MillerAndrew Digitally signed by MillerAndrew Date: 2025.01.21 13:01:54 -05'00'	**Date:**
Division Director: Jay Ahmad	**Signature:** AhmadJay Digitally signed by AhmadJay Date: 2025.01.21 14:28:46 -05'00'	**Date:**
Procurement Director/Designee:	**Signature:** SarahHamilton Digitally signed by SarahHamilton Date: 2025.01.31 10:48:26 -05'00'	**Date:**

Please be sure to attach the fully approved form to the requisition in SAP.

Rev. January 2024

CAO

Executive Summary

Recommendation to approve a work order with APTIM Environmental & Infrastructure, LLC, to provide professional engineering services for 2026-2027 Local Government Funding Request, under Contract No. 18-7432-CZ, for time and material not to exceed $28,462, and make a finding that this item promotes tourism (Fund 1105, Project No. 90065).

OBJECTIVE: To move forward with preparation of the 2026-2027 Local Government Funding Request (LGFR) for Collier County's shore protection projects.

CONSIDERATIONS: Collier County participates in the LGFR process annually. APTIM Environmental & Infrastructure, LLC, (APTIM) will assist the County with Preparation of the 2026-2027 LGFR for Collier County's shore protection projects; South Marco Island and Collier County Beach Renourishment projects; and the County's inlet projects: Wiggins Pass and Doctors Pass. APTIM will evaluate all the elements of the coastal projects as they apply to the Florida Administrative Code, and the LGFR application and guidance documents will be evaluated to increase Florida Department of Environmental Protection (FDEP) ranking and cost-sharing opportunities where applicable. Additionally, APTIM will update the application response to account for the modification of the LGFR based on the latest rating guidelines, rules, and current project cost information. Once APTIM has completed a draft of the LGFR application, they will provide it to Collier County for review and comment prior to submittal to FDEP.

FDEP will review the application and may request additional information (RAI). APTIM will respond to FDEP's RAI and provide additional information to the FDEP on behalf of Collier County as needed. FDEP then reviews the applications in detail and provides initial project rankings and initial project assessments. Collier County can respond to the initial project assessment. APTIM will then review the initial project assessment on behalf of Collier County and, if warranted, prepare a letter on behalf of the County to the FDEP identifying the area within the application that may provide additional points to the County. The County will issue a Work Order under Contract No. 18-7432-CZ, which the BCC approved on March 10, 2020, item 16.E.4.

This item is consistent with the Infrastructure and Asset Management element of Collier County's Strategic Plan by preparing for the impacts of natural disasters on our critical infrastructure and natural resources.

ADVISORY COMMITTEE RECOMMENDATIONS: This item will be presented to the Coastal Advisory Committee (CAC) on March 13, 2025, and the Tourist Development Council (TDC) on March 18, 2025.

FISCAL IMPACT: Funding for the proposed work order, in the amount of $28,462, is available in the Tourist Development Tax Fund (1105), Project No. 90065, FDEP LGFR Analysis. The source of funding is Tourist Development Tax. Funding for this work order will not be requested for reimbursement from any grantor agency.

LEGAL CONSIDERATIONS: This item is approved as to form and legality and requires majority vote for approval. – CMG

RECOMMENDATIONS: To approve a work order with APTIM Environmental & Infrastructure, LLC, to provide professional engineering services for 2026-2027 Local Government Funding Request, under Contract No. 18-7432-CZ, for time and material not to exceed $28,462, and make a finding that this item promotes tourism (Fund 1105, Project No. 90065).

PREPARED BY: Andrew Miller, P.E., Coastal Zone Management, Capital Project Planning, Impact Fees, and Program Management Division

ATTACHMENTS:

1. .WO - APTIM - LGFR 2026-2027

WORK ORDER/PURCHASE ORDER

Contract 18-7432-CZ "Professional Services Library Coastal Engineering Category"
Contract Expiration Date: March 9, 2026

This Work Order is for professional Engineering Services for work known as:

Project Name: FDEP LGFR Analysis
Project No: 90065.1

The work is specified in the proposal dated February 12, 2025, which is attached hereto and made a part of this Work Order. In accordance with Terms and Conditions of the Agreement referenced above, this Work Order/Purchase Order is assigned to: APTIM Environmental & Infrastructure, LLC.

Scope of Work: As detailed in the attached proposal and the following:

* Task 1 South Marco Beach LGFR Application
* Task 2 North County Beaches & Doctors Pass LGFR Application
* Task 3 Wiggins Pass LGFR Application

Schedule of Work: Complete work within 210 days from the date of the Notice to Proceed which is accompanying this Work Order. The Consultant agrees that any Work Order that extends beyond the expiration date of Agreement # 18-7432-CZ will survive and remain subject to the terms and conditions of that Agreement until the completion or termination of this Work Order.

Compensation: In accordance with the Agreement referenced above, the County will compensate the Firm in accordance with following method(s): ☐Negotiated Lump Sum (NLS) ☐Lump Sum Plus Reimbursable Costs (LS+RC) ☒Time & Material (T&M) (established hourly rate – Schedule A) ☐ Cost Plus Fixed Fee (CPFF), as provided in the attached proposal.

Task 1	$ 9,098.00
Task 2	$ 10,266.00
Task 3	$ 9,098.00
TOTAL FEE	$ 28,462.00

PREPARED BY: MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.26 06:37:21 -05'00' _____ _____

Andrew Miller, Manager - CZM Date

APPROVED BY: Anthony Khawaja P.E. Digitally signed by Anthony Khawaja P.E. Date: 2025.02.26 08:57:06 -05'00' _____ _____

Jay Ahmad, Division Director Date

APPROVED BY: _____ _____

Trinity Scott, Department Head Date

By the signature below, the Firm (including employees, officers and/or agents) certifies, and hereby discloses, that, to the best of their knowledge and belief, all relevant facts concerning past, present, or currently planned interest or activity (financial, contractual, organizational, or otherwise) which relates to the proposed work; and bear on whether the Firm has a potential conflict have been fully disclosed.

Additionally, the Firm agrees to notify the Procurement Director, in writing within 48 hours of learning of any actual or potential conflict of interest that arises during the Work Order and/or project duration.

ACCEPTED BY: APTIM Environmental & Infrastructure, LLC

Nicole Sharp, Program Manager	Date

(Remainder of page intentionally left blank)

IN WITNESS WHEREOF, the parties hereto, have each, respectively, by an authorized person or agent, have executed this Work Order on the date and year first written below.

ATTEST:
, Clerk of Courts

By: _____

Dated: _____
(SEAL)

BOARD OF COUNTY COMMISSIONERS
COLLIER COUNTY, FLORIDA

By: _____
Burt L. Saunders , Chairman

APTIM Environmental & Infrastructure, LLC.

By:_____
Signature
Nicole Sharp, Program Manager
↑Type/print signature and title↑

_____
First Witness

_____
↑Type/print witness name↑

_____
Second Witness

_____
↑Type/print witness name↑

Approved as to Form and Legality:

_____
Assistant County Attorney

_____
Print Name

APTIM
6401 Congress Avenue, Suite 140
Boca Raton, FL 33487
Tel: +1 561 391 8102
www.aptim.com

February 12, 2025

Andy Miller
Collier County Coastal Zone Management
2685 S. Horseshoe Drive
Naples, FL 34104

Re: 2026-2027 Local Government Funding Request (LGFR) Preparation
Collier County, Contract No. 18-7432-CZ

Dear Andy:

This letter is in response to Collier County's (County) request for a proposal for support services from Aptim Environmental & Infrastructure, LLC (APTIM). The services will include funding and technical support to assist the County with submittal of the 2026-2027 Local Government Funding Requests (LGFR) for Collier County's: South Marco Island Beach Renourishment Project, North County Beach Renourishment Program including Doctors Pass, and the County's inlet project at Wiggins Pass.

Included as Exhibits are: Scope of Work (Exhibit A), Estimated Fee Proposal (Exhibit B), and Rates Schedule (Exhibit C). APTIM proposes to provide these services on a time and materials basis not-to-exceed $28,462.00 under the terms and conditions of the existing Contract No. 18-7432-CZ dated March 10, 2020, and as amended May 7, 2020. Barring any unforeseen circumstances, all work will be completed within 210 days of receiving the Notice to Proceed.

Sincerely,

Nicole S. Sharp, P.E.
Director, Coastal Sciences & Engineering
Aptim Environmental & Infrastructure, LLC

_____
Client Authorized Signature

_____
Name

_____
Title

cc: Erica Carr-Betts, APTIM

Exhibit A
Scope of Work

2026-2027 Local Government Funding Requests (LGFR)
Collier County, Florida
Scope of Work

Introduction

To distribute state funds for shore protection and inlet management projects, the Florida Department of Environmental Protection (FDEP) requests that local sponsors submit an annual Local Government Funding Request (LGFR) for their projects. This scope of work details the tasks required to assist the County with preparing and submitting the 2026-2027 LGFRs to the FDEP and responding to both the FDEP's Application Review and Project Assessment for Collier County's South Marco and North County Beach Renourishment projects, and inlet maintenance projects at Doctors Pass, and Wiggins Pass. Once a draft of the LGFR applications have been completed, a copy will be provided to Collier County for review and comment prior to Collier County submittal to the FDEP.

Following application submission, the FDEP will review the application in detail and provide initial project rankings and initial project assessments. APTIM will perform a review of the initial project assessment on behalf of Collier County and, if warranted, provide the County with a draft letter to the FDEP identifying the areas within the applications that may provide additional points to the County.

1. South Marco Beach LGFR Application

APTIM will assist the County with preparation of the 2026-2027 LGFR for Collier County's South Marco Island Renourishment Project. Building upon past LGFR applications, APTIM will update the application response to account for updates to the project. All the elements of the projects as they apply to the 62B-36 Rule and the LGFR application and guidance document will be evaluated to optimize FDEP ranking and cost sharing opportunities where practical. Additionally, maps will be updated and the FDEP's application response will be reviewed and, if required, a response to the draft assessment will be completed.

2. North County Beaches & Doctors Pass LGFR Application

APTIM will assist the County with preparation of the 2026-2027 LGFR for Collier County's North County beaches (Vanderbilt, Park Shore, and Naples Beach) and Doctors Pass projects. Building upon past LGFR applications, APTIM will update the application response to account for current project status and cost information. All the elements of the projects as they apply to the 62B-36 Rule and the LGFR application and guidance, documents will be evaluated to optimize FDEP ranking and cost sharing opportunities where practical. Additionally, maps will be updated and the FDEP's application response will be reviewed and, if required, a response to the draft assessment will be completed.

3. Wiggins Pass LGFR Application

APTIM will assist the County with preparation of the 2026-2027 LGFR for Collier County's Wiggins Pass inlet maintenance project. All the elements of the project as they apply to the 62B-36 Rule, LGFR application, and guidance document will be evaluated to increase FDEP ranking and cost sharing opportunities where practical. Additionally, maps will be updated and the FDEP's application response will be reviewed and, if required, a response to the draft assessment will be completed.

Exhibit B
Estimated Fee Proposal

ESTIMATED FEE PROPOSAL FOR
2026-2027 LOCAL GOVERNMENT FUNDING REQUEST (LGFR) PREPARATION
COLLIER COUNTY, Contract No. 18-7432-CZ

February 12, 2025

	Task Item	Cost	Principal (Hours)	Senior Engineer (Hours)	Engineer (Hours)	GIS Specialist (Hours)	Clerical/ Administrative (Hours)
1	**South Marco Beach LGFR Application**	**$9,098.00**	8	24	12	10	4
2	**North County Beaches & Doctors Pass LGFR Application**	**$10,266.00**	8	28	12	14	4
3	**Wiggins Pass LGFR Application**	**$9,098.00**	8	24	12	10	4
		Total Hours =	24	76	36	34	12
		Rate =	$231	$177	$130	$115	$73
		Cost =	$5,544	$13,452	$4,680	$3,910	$876

TOTAL **$28,462.00**

Exhibit C
Rate Schedule

DocuSign Envelope ID: 80B82885-B471-4CCC-BC63-021FDAD6CE8B

* * * * *

SCHEDULE B-ATTACHMENT 1

RATE SCHEDULE

Title	Hourly Rate
Principal	**$231**
Senior Project Manager	**$203**
Project Manager	**$160**
Senior Engineer	**$177**
Engineer	**$130**
Senior Inspector	**$126**
Inspector	**$93**
Senior Planner	**$150**
Planner	**$120**
Senior Designer	**$140**
Designer	**$105**
Environmental Specialist	**$120**
Senior Environmental Specialist	**$167**
Scientist/Geologist	**$115**
Senior Scientist/Geologist	**$153**
Marine Biologist/Hydrogeologist	**$120**
Senior Marine Biologist/Hydrogeologist	**$145**
Senior GIS Specialist	**$155**
GIS Specialist	**$115**
Clerical/Administrative	**$73**
Senior Technician	**$103**
Technician	**$83**
Surveyor and Mapper	**$125**
CADD Technician	**$107**
Survey Crew - 2 man	**$145**
Survey Crew - 3 man	**$180**
Survey Crew - 4 man	**$215**
Senior Architect	**$160**
Architect	**$125**

The above hourly rates are applicable to Time and Materials task(s) only. The above list may not be all inclusive. Hourly rates for additional categories required to provide particular project services shall be mutually agreed upon by the County and firm, in writing, on a project by project basis, as needed, and will be set forth in the Work Order agreed upon by the parties.

☒ **Grant Funded**: The above rates are for purposes of providing estimate(s), as required by the grantor agency.

* * * * *

CAO

Collier County
Procurement Services Division

Direct Select Form

Request Date	Contract No.	Proposal Cost Estimate	Construction Cost Estimate
	18-7432-CZ	$27,000	N/A

Requested By (*Use name as it appears in Outlook*):	**Division / Department:**
Andrew Miller	Transportation Management / Coastal Zone

Administrative Agent (*If different from Requestor*):

Library Category: Coastal Engineering	**Vendor Name:** APTIM Environmental & Infrastructure, LLC

Work Assignment Title: Professional Support Services 2026-2027 LGFR

Description of Requested Services:

APTIM will assist the County with preparation of the 2026-2027 LGFR (Local Government Funding Request) for Collier County's South Marco Island Beach Renourishment Project, North County Beach Renourishment program including Doctors Pass, and the County's inlet project at Wiggins Pass.

Justification: (*Select all that apply and explain below*)	☑ Past experience with project ☐ Continuation of previous work assignment ☐ Unique qualifications ☐ Other

Comments / Explanation of Direct Select:

APTIM prepares the LGFR applications annually and provides cost effective and efficient services due to their previous experience. (FY24 PO 4500230418)

Requestor: Andrew Miller	**Signature:** MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.04 08:20:50 -05'00'	**Date:**
Division Director: Jay Ahmad	**Signature:** AhmadJay Digitally signed by AhmadJay Date: 2025.02.04 08:47:04 -05'00'	**Date:**
Procurement Director/Designee:	**Signature:** SarahHamilton Digitally signed by SarahHamilton Date: 2025.02.05 14:01:50 -05'00'	**Date:**

Please be sure to attach the fully approved form to the requisition in SAP.

Rev. January 2024

Executive Summary

Recommendation to approve Change Order No. 3 for contract No. 24-8292 with Earth Tech Enterprises, Inc., for the Park Shore Beach Renourishment, increasing the contract amount by $7,000, and make a finding that this item promotes tourism (Project 90067).

OBJECTIVE: To process a change order for construction contract 24-8292 for the 2024 truck haul beach renourishment project at Park Shore, increasing the contract amount by $7,000.

CONSIDERATIONS: On December 10, 2024, (Item 16.B.14), the Board of County Commissioners (the "Board") approved contract 24-8292 Park Shore Beach Renourishment, with Earth Tech Enterprises, Inc., in the amount of $3,817,530.

Shortly after the project started, the Sea House Condominium contacted staff and advised that they would not agree to a standard Temporary Beach Restoration Easement and required a Beach Access License Agreement before allowing the County to proceed with renourishment on their property. As the contractor advanced beach fill activities, staff directed the contractor to forego filling at Sea House until an agreement was reached. A Beach Access License Agreement was agreed to on February 7, 2025. At that time the contractor had advanced the beach fill operation well to the south of Sea House Condominium. It is important to the County's design that all properties in Park Shore are filled to the design template to ensure sustainability of design and protection of upland properties. Completion of this design serves a public purpose.

On February 19, 2025, staff issued a written Work Directive to the contractor to fill the beach at Sea House Condominium. Since hauling northward will damage the newly constructed beach, the contractor needs to re-work the damaged beach by re-blading the previously completed section.

Filling the beach at the Sea House parcel is important to maintain the new beach berm at a continuous elevation, protecting upland properties without a gap in the berm.

A summary of the changes identified in the Work Directive is shown below:

- Return operations to the beach at Sea House parcel approximately R-45+700 to fill per design template.
- Re-blade completed beach to remove ruts from hauling activities between Sea House and Horizon Way.

This item is consistent with the Quality of Place Objectives of the County's Strategic Plan.

ADVISORY COMMITTEE RECOMMENDATIONS: This item will be presented to the Coastal Advisory Committee (CAC) on March 13, 2025 and to the Tourism Development Council on March 18, 2025.

FISCAL IMPACT: Change Order #3 increases the overall contract by $7,000. The additional funding is available with the TDC Beach Renourishment Fund (1105), Project 90067. The source of funding is Tourist Development Tax.

FDEP cost-share funding will be requested if eligible at a future date to reimburse Collier County for a portion of the completed work.

LEGAL CONSIDERATIONS: This item is approved as to form and legality and requires majority vote for approval. – CMG

RECOMMENDATIONS: To approve Change Order No. 3 for contract No. 24-8292 with Earth Tech Enterprises, Inc., for the Park Shore Beach Renourishment, increasing the contract amount by $7,000, and make a finding that this item promotes tourism (Project 90067).

PREPARED BY: Andrew Miller, P.E., Coastal Zone Management, Transportation Engineering Division

ATTACHMENTS:
1. CZM- CO#3 - Park Shore

Collier County

Procurement Services Change Order Form

Contract# 24-8292 **CO#** 3 **PO#** 4500236559 **Project #:** 90067

Project Name: 2024 Park Shore Renourishment

Contractor/Consultant Name: Earth Tech Enterprises, Inc.

Select One: ☑ **Contract Modification (Construction or Project Specific)** ☐ **Work Order Modification**

Project Manager Name: Andrew Miller **Division Name:** Transportation Engineering

Original Contract/Work Order Amount	$3,817,530.00	12/10/2024 16.B.14	**Original BCC Approval Date; Agenda Item #**
Current BCC Approved Amount	$6,556,683.00	2/25/2025 16.B.9	**Last BCC Approval Date; Agenda Item #**
Current Contract/Work Order Amount	$6,556,683.00	5/2/2025	**SAP Contract Expiration Date (MASTER)**
Dollar Amount of this Change	$7,000.00	71.94%	**Total % Change from Original Amount**
Revised Contract/Work Order Total	$6,563,683.00	0.11%	**% Change from Current BCC Approved Amount**
Total Cumulative Changes	$2,746,153.00	0.11%	**% Change from Current Amount**

Notice to Proceed Date 1/2/2025 **Original NTP # of Days** 75 **Original Final Completion Date** 3/18/2025 **Last Final Approved Date** 5/2/2025

# of Days Added 0 **Revised Final Date** (includes this change) N/A **Current Substantial Completion Date** (if applicable) 4/2/2025

Provide responses after each question in box below (Responses should be **brief and specific**). Attach additional information and/or documentation from the Design Professional and/or Contractor, if needed, with your submission of this Change Order and complete summary on next page. **Check all that apply to this Change Order request:** ☐ **Add Time;** ☑ **Add funds**; ☐ **Use of Allowance;** ☐ **Modify/Delete existing Task(s);** ☐ **Add new Task(s);** ☐ **Reallocate funds;** ☐ **Other** (must be explained in detail below)

1.) This Change Order will add $7,000 to re-blade the newly constructed beach after filling the skipped parcel at sea House

2.) "N/A"

3.) This change was not included in the contract because the original intent was to construct the beach linearly without gaps. Unfortunately the county did not have a right-of-access agreement in place when the construction reached this area.

4.) If the change is not processed, the skipped parcel will not be re-nourished, introducing a gap in the protection provided by the filled beach.

Collier County

Procurement Services Change Order Form

Contract# 24-8292 **CO#** 3 **PO#** 4500236559 **Project #:** 90067

Project Name: 2024 Park Shore Renourishment

Contractor/Consultant Name: Earth Tech Enterprises, Inc.

Change Order/Amendment Summary

(If additional spaces needed, attached a separate Summary page to this amendment request)

CO#	AMD#	Description	COST		TIME		Justification
			Additive (+)	Deductive (-)	Days Added	Total New Time	
1		add additional time to continue renourishment			15	90	project sand volume increased due to previous storm season
2		add additional time, additional funding and the use of the allowance funds of $254,000	$2,739,153		30	120	Increased volume is necesssary to provide County design standard beach width
3		add additional funding to close the gap at Sea House Condos	$7,000				right-of-access agreement was delayed

☐ Check here if additional summary page/s are attached to this Change Order

Collier County

Procurement Services Change Order Form

Contract# 24-8292	**CO#** 3	**PO#** 4500236559	**Project #:** 90067

Project Name: 2024 Park Shore Renourishment

Contractor/Consultant Name: Earth Tech Enterprises, Inc.

Acceptance of this Change Order shall constitute a modification to contract / work order identified above and will be subject to all the same terms and conditions as contained in the contract / work order indicated above, as fully as if the same were stated in this acceptance. The adjustment, if any, to the Contract shall constitute a full and final settlement of any and all claims of the Contractor / Vendor / Consultant / Design Professional arising out of or related to the change set forth herein, including claims for impact and delay costs.

Contractor/Consultant/Design Professional signature below must be from an authorized person/officer/director of the Company or listed as the qualified licensed Professional "Project Coordinator" or Design/Engineer Professional under the agreement. Signature authority of person signing will be verified through the contract OR through the Florida Department of State, Division of Corporations (Sunbiz) website (https://dos.myflorida.com/sunbiz/search/). If the person signing is not listed, we will require signature authority by one of the listed officers/directors of the company giving that person signature authority.

Prepared by: MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.19 12:41:09 -05'00' Date: _____
Signature-**Division Project Manager**

_____
Printed Name

Accepted by: _____ Date: _____
Signature- **Design/Engineer Professional** (if applicable)

_____
Printed Name/Title/Company Name

Accepted by: _____ Date: _____
Signature- **Contractor/Consultant/Vendor**

_____
Printed Name/Title/ Company Name

Approved by: _____ Date: _____
Signature-**Division Manager or Designee** ***(Optional)***

_____
Printed Name

Approved by: AhmadJay Digitally signed by AhmadJay Date: 2025.02.19 12:59:12 -05'00' Date: _____
Signature-**Division Director or Designee** ***(Optional)***

_____
Printed Name

Approved by: _____ Date: _____
Signature-**Division Administrator or Designee** ***(Optional)***

_____
Printed Name

Collier County

Procurement Services Change Order Form

Contract# 24-8292	**CO#** 3	**PO#** 4500236559	**Project #:** 90067

Project Name: 2024 Park Shore Renourishment

Contractor/Consultant Name: Earth Tech Enterprises, Inc.

FOR PROCURMENT USE ONLY

FY ____ CHO Request # ☐

Approved by: _____
Signature-Procurement Professional Signature/Date

Approved by: _____
Signature-Procurement Manager/Director ***(OPTIONAL)***

APPROVAL TYPE:

☐ **Administrative** ☐ **Administrative-BCC Report** ☐ **BCC Stand-Alone ES (BCC Approval Required)**

BCC APPROVAL

ATTEST:

Crystal K. Kinzel, Clerk of the Circuit Court
and Comptroller

By: _____

Dated: _____

(SEAL)

BOARD OF COUNTY COMMISSIONERS
COLLIER COUNTY, FLORIDA

By: _____

_____, Chairman

Date: _____

Agenda # _____

Approved as to Form and Legality:

_____
Deputy County Attorney

_____
Print Name

EARTH TECH
ENTERPRISES

6180 Federal Court
Ft. Myers, FL 33905
Phone 239-774-1223
Fax 239-774-1227

Proposal

Date: 2/21/2025

Submitted To: Collier County
Project Name: Parkshoer regrade

Schedule of Values

Item #	Descripton	Quantity	Measure	Price	Total
	Regreade truck ruts due to traveling over completed work	36	hr	$ 195.00	$ 7,000.00
	Sitework Total				

Transportation Management Services
WORK DIRECTIVE CHANGE

CONTRACT # /PROJECT NAME: 24-8292 Park Shore Renourishment **CHANGE # 2**

DATE OF ISSUANCE: February 19, 2025 **EFFECTIVE DATE: February 19, 2025**

OWNER: Collier County Board of Commissioners **PROJECT#: 90067**

CONTRACTOR: Earth Tech Enterprises, Inc. **ENGINEER/DESIGN**
PROFESSIONAL: APTIM Environmental and Infrastructure, LLC.

You are directed to proceed promptly with the following change(s):

Description:

- Return operations to beach at Sea House parcel approximately R-45+700 to fill per design template.
- Re-blade completed beach to remove ruts from hauling activities between Sea House and Horizon Way

Purpose of Work Directive Change: Complete design beach template at Sea House parcel previously skipped due to lack of executed right-of-access agreement.

If a claim is made that the above change(s) have affected Contract Price or Contract Times any claim for a Change Order based thereon will involve one or more of the following methods of determining the effect of the changes(s).

Method of determining change in Contract Price:
☐ Unit Prices
☐ Lump Sum
☒ Other lump sum for additional re-grading

Method of determining change in Contract Times:
☐ Contractor's records
☐ Engineer's record
☐ Other

Estimated **increase** in Contract Price
$ **7,000.00**

Estimated change in Contract Time:
Increase by 0 calendar days.

RECOMMENDED:

By: Nicole Sharp Digitally signed by Nicole Sharp Date: 2025.02.18 15:47:21 -05'00'
Engineer

AUTHORIZED:

By: MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.18 15:08:29 -05'00'
Owner's Representative

Executive Summary

Recommendation to approve a work order with Humiston & Moore Engineers to provide professional engineering services for the 2025 Vanderbilt Beach Renourishment Project and 2025 Pelican Bay Beach Renourishment under Contract No. 18-7432-CZ, for time and material not to exceed $143,811, and make a finding that this item promotes tourism (Fund 1105, Project No. 90066 and 50126).

OBJECTIVE: To move forward with professional engineering services for the 2025 Vanderbilt Beach and Pelican Bay Beach Renourishment Projects.

CONSIDERATIONS: Humiston & Moore Engineers will assist the County in conducting beach renourishment activities on Vanderbilt Beach from FDEP reference monuments R-22 to R-31.5 and in Pelican Bay Beach from R-31.5 to R-37. This work order will provide professional services including engineering design, preparation of construction plans and technical specifications, bidding services, coordination with permitting agencies for Notice to Proceed, and serving as the Engineer of Record for the construction events. As with past renourishments, Pelican Bay Services Division will pay for its share of the engineering services. The location of the project is not eligible for tourist development taxes.
The engineering costs for Vanderbilt Beach and Pelican Bay Beach are listed below according to the tasks "a" and "b" respectively, as outlined in H&M's proposal:

Vanderbilt Beach Project 90066: $95,121
Pelican Bay Beach Project 50126: $48,690

Pelican Bay Services Division will contribute funding based on the ratio/quantity of sand placed at their beach versus the overall project quantity.

This item is consistent with the Quality of Place Objectives of the County's Strategic Plan.

ADVISORY COMMITTEE RECOMMENDATIONS: This item will be presented to the Coastal Advisory Committee (CAC) on March 13, 2025, and the Tourist Development Council (TDC) on March 18, 2025.

FISCAL IMPACT: The work order totals $143,811. Funding in the amount of $95,121 is available within Tourist Development Tax Beach Renourishment Fund (1105), Projects 90066, and funding in the amount of $48,690 is available within Pelican Bay Irrigation and Landscape (3041) Project 50126. Pelican Bay Services Division will contribute funding based on the ratio/quantity of sand placed at their beach versus the overall project quantity. Sources of funding include Tourist Development Tax and Pelican Bay Capital Funding.

If eligible at a future date, FDEP cost-share funding will be requested to reimburse Collier County for a portion of the completed work.

LEGAL CONSIDERATIONS: This item is approved as to form and legality and requires majority vote for approval. – CMG

RECOMMENDATIONS: To approve a work order with Humiston & Moore Engineers to provide professional engineering services for the 2025 Vanderbilt Beach Renourishment Project and 2025 Pelican Bay Beach Renourishment under Contract No. 18-7432-CZ, for time and material not to exceed $143,811.00, and make a finding that this item promotes tourism (Fund 1105, Project No. 90066 and 50126).

PREPARED BY: Andrew Miller, P.E., Coastal Zone Management, Capital Project Planning, Impact Fees, and Program Management Division

ATTACHMENTS:

1. .Work Order-HM Vanderbilt - Pelican Bay Beach Design GH MLDH signed 2025

WORK ORDER/PURCHASE ORDER

Contract 18-7432-CZ "Professional Services Library- Coastal Engineering Category"
Contract Expiration Date: March 9, 2026

This Work Order is for professional Engineering services for work known as:

Project Name: 2025 Vanderbilt & Pelican Bay Beach Renourishment
Project No: 90066.1 & 50126.2

The work is specified in the proposal dated February 4, 2025 which is attached hereto and made a part of this Work Order. In accordance with Terms and Conditions of the Agreement referenced above, this Work Order/Purchase Order is assigned to: Humiston & Moore Engineers, P.A.

Scope of Work: As detailed in the attached proposal and the following:

* Task 1a Design, Construction Plans and Specifications – Vanderbilt Beach
* Task 1b Design, Construction Plans and Specifications – Pelican Bay

* Task 2a Bidding Assistance & Notice to Proceed – Vanderbilt Beach
* Task 2b Bidding Assistance & Notice to Proceed – Pelican Bay

* Task 3a Engineer of Record – Vanderbilt Beach
* Task 3b Engineer of Record – Pelican Bay

* Task 4a Surveys – Vanderbilt Beach
* Task 4b Surveys – Pelican Bay

Schedule of Work: Complete work within 270 days from the date of the Notice to Proceed which is accompanying this Work Order. The Consultant agrees that any Work Order that extends beyond the expiration date of Agreement # 18-7432-CZ will survive and remain subject to the terms and conditions of that Agreement until the completion or termination of this Work Order.

Compensation: In accordance with the Agreement referenced above, the County will compensate the Firm in accordance with following method(s): ☒Negotiated Lump Sum (NLS) ☐Lump Sum Plus Reimbursable Costs (LS+RC) ☐Time & Material (T&M) (established hourly rate – Schedule A) ☐ Cost Plus Fixed Fee (CPFF), (define which method will be used for which tasks) as provided in the attached proposal.

Task 1a	$19,868.00
Task 1b	$11,712.00
Task 2a	$2,809.00
Task 2b	$1,708.00
Task 3a	$43,694.00
Task 3b	$26,020.00
Task 4a	$28,750.00
Task 4b	$9,250.00
TOTAL FEE	$143,811.00

PREPARED BY: MillerAndrew Digitally signed by MillerAndrew Date: 2025.02.26 15:14:40 -05'00' _____ _____

Andrew Miller, Coastal Zone Manager Date

APPROVED BY: Anthony Khawaja P.E. Digitally signed by Anthony Khawaja P.E. Date: 2025.02.26 16:06:05 -05'00' _____ _____

Jay Ahmad, Director Transportation Engineering Date

APPROVED BY: _____ _____

Trinity Scott, Department Head Date

By the signature below, the Firm (including employees, officers and/or agents) certifies, and hereby discloses, that, to the best of their knowledge and belief, all relevant facts concerning past, present, or currently planned interest or activity (financial, contractual, organizational, or otherwise) which relates to the proposed work; and bear on whether the Firm has a potential conflict have been fully disclosed.

Additionally, the Firm agrees to notify the Procurement Director, in writing within 48 hours of learning of any actual or potential conflict of interest that arises during the Work Order and/or project duration.

ACCEPTED BY: Humiston & Moore Engineers, P.A.

_____ _____

Brett Moore, President Date

(Remainder of page intentionally left blank)

IN WITNESS WHEREOF, the parties hereto, have each, respectively, by an authorized person or agent, have executed this Work Order on the date and year first written below.

ATTEST:
, Clerk of Courts

By: _____

Dated: _____
(SEAL)

_____
First Witness

_____
↑Type/print witness name↑

_____
Second Witness

_____
↑Type/print witness name↑

Approved as to Form and Legality:

_____
Assistant County Attorney

_____
Print Name

BOARD OF COUNTY COMMISSIONERS
COLLIER COUNTY, FLORIDA

By: _____
Burt L. Saunders, Chairman

Humiston & Moore Engineers, P.A.

By:_____
Signature

_____
↑Type/print signature and title↑

Page 1350 of 1378

HUMISTON
& MOORE
ENGINEERS
COASTAL
ENGINEERING DESIGN
AND PERMITTING

5679 STRAND COURT
NAPLES, FLORIDA 34110
FAX:239 594 2025
PHONE: **239 594 2021**

February 4, 2025
(Proposal valid for 120 days.)

Andrew Miller, Principal Project Manager
Coastal Zone Management (CZM)
Collier County Government
2685 South Horseshoe Drive Unit 103
Naples, FL 34104

Re: Humiston & Moore Engineers (HM) Engineering Services for 2025 Vanderbilt and Pelican Bay Beach Renourishment Project (Contract No. 18-7432-CZ)

Dear Andy:

Enclosed is a proposal to support CZM in conducting beach renourishment activities on Vanderbilt (R22+300 to R31.5) and Pelican Bay (R31.5 to R37) beaches. HM will provide professional services including the pre-construction survey, engineering design, preparation of construction plans and technical specifications in coordination with permitting agencies for a Notice to Proceed. HM will serve as the Engineer of Record for the construction project.

Included with the project proposal is the Scope of Work, Fee Proposal, and the Rate Schedule. HM proposes to provide these services on a lump sum basis with a cost of $143,811.00 under the terms and conditions of the existing Contract No. 18-7432-CZ.

Barring any unforeseen circumstances, all work will be completed within 270 days of receiving the Notice to Proceed.

Please call if you have any questions.

Sincerely yours,

HUMISTON & MOORE ENGINEERS

Brett D. Moore, P.E.
President

EXHIBIT A
SCOPE OF WORK
VANDERBILT & PELICAN BAY BEACH
RENOURISHMENT COLLIER COUNTY, FL
January 2025

Introduction

This is a scope of work for Humiston & Moore Engineers (H&M) to provide the engineering services described below to support the County in preparing the design, plans and specifications, bidding, construction & permit documents for conducting a truck haul beach renourishment project on Vanderbilt Beach (R-22+300 to R-31.5) and Pelican Bay (R31.5 to R-37).

This proposal contains the tasks necessary to bring the project through construction. H&M will assist the County in preparing for construction by conducting analyses to determine project extents and volumes, producing construction plans and technical specifications, coordinating with FDEP for Notice to Proceed, and providing bidding assistance to the County. H&M will support the County's Inspection efforts during construction and will develop the post-construction certification based largely on the surveys, reports and observation of the work conducted by contractor during construction.

Task 1a. Design, Construction Plans & Specifications - Vanderbilt Beach $19,868.00

H&M engineers will perform engineering analysis to determine project extents and estimate volumes needed. The goal of the design will be to place material so that the project area will be able to absorb 5 to 6 years of typical erosion in order to last until the next major nourishment project, barring any major storm events. The design will be based on the matrix-design method updated with the latest composite erosion rate and the most recent annual monitoring survey which was conducted in 2024. After reviewing the preliminary volume estimates, an analysis will be conducted to optimize placement areas and volumes. H&M will finalize the quantities and fill areas based on consultation with Collier County and permitting agencies. H&M will support the County with one coordination meeting related to the project with local stakeholders as deemed necessary. H&M will consult with permit agencies and their consultants about the newest permit conditions. This will include Specific Conditions described in the November 2017 FDEP Permit No. 0331817- 004-JM., which include

- Fill history and incremental volume analysis (paragraph 1.b.)
- Refine beach design to avoid or minimize hardbottom impacts based on the latest physical and biological monitoring surveys.

Once the target volumes and placement areas have been approved by the County, H&M will conduct engineering design work to prepare the construction templates. H&M engineers will update the construction plans including plan views and cross-sections of project areas, beach access, equipment storage areas, environmental protection areas and other information required for execution of this project.

The construction plans and volumes for bidding will be based on the most recent annual physical monitoring surveys which were conducted in 2024. Technical specifications developed for the project will integrate the QA/QC plans, environmental standards, and permit conditions into the work.

H&M will assist the County in preparation of the environmental protection plan, which will be integrated into the bidding documents.

H&M understands that time is of the essence on this truck haul renourishment project and will have plans, specifications and bidding documents prepared by 7/1/2025 to allow beach renourishment to begin by 11/1/2025, provided that required documentation such as preconstruction survey data, finalized construction plans, and County approvals are conducted in a timely manner to proceed with the work.

Task 1b. Design, Construction Plans & Specifications - Pelican Bay $11,712.00

H&M engineers will perform engineering analysis to determine project extents and estimate volumes needed. The goal of the design will be to place material so that the project area will be able to absorb 5 to 6 years of typical erosion in order to last until the next major nourishment project, barring any major storm events. The design will be based on the matrix-design method updated with the latest composite erosion rate and the most recent annual monitoring survey which was conducted in 2024. After reviewing the preliminary volume estimates, an analysis will be conducted to optimize placement areas and volumes. H&M will finalize the quantities and fill areas based on consultation with Collier County and permitting agencies. H&M will support the County with one coordination meeting related to the project with local stakeholders as deemed necessary. H&M will consult with permit agencies and their consultants about the newest permit conditions. This will include Specific Conditions described in the November 2017 FDEP Permit No. 0331817- 004-JM., which include

- Fill history and incremental volume analysis (paragraph 1.b.)
- Refine beach design to avoid or minimize hardbottom impacts based on the latest physical and biological monitoring surveys.

Once the target volumes and placement areas have been approved by the County, H&M will conduct engineering design work to prepare the construction templates. H&M engineers will update the construction plans including plan views and cross-sections of project areas, beach access, equipment storage areas, environmental protection areas and other information required for execution of this project.

The construction plans and volumes for bidding will be based on the most recent annual physical monitoring surveys which were conducted in 2024. Technical specifications developed for the project will integrate the QA/QC plans, environmental standards, and permit conditions into the work.

H&M will assist the County in preparation of the environmental protection plan, which will be integrated into the bidding documents.

H&M understands that time is of the essence on this truck haul renourishment project and will have plans, specifications and bidding documents prepared by 7/1/2025 to allow beach renourishment to begin by 11/1/2025, provided that required documentation such as preconstruction survey data, finalized construction plans, and County approvals are conducted in a timely manner to proceed with the work.

Task 2a. Bidding Assistance & Notice to Proceed- Vanderbilt Beach $2,809

Once the construction plans and technical specifications are completed, H&M will provide the FDEP all Items necessary to request a Notice to Proceed (NTP) and provide the County with a bid package containing construction plans, technical specifications, project permits, bid form, contractor questionnaire, and engineer's opinion of probable costs. The questionnaire will be integrated into the technical specifications.

H&M will assist the County in their lead in the bidding process. H&M will participate in the Pre- Bid Meeting and assist the County in answering technical questions as needed during the bidding process. Once the bids have been opened, H&M will assist the County in reviewing the bids and provide a recommendation to the County based on a review of the submitted bids.

Task 2b. Bidding Assistance & Notice to Proceed- Pelican Bay $1,708.00

Once the construction plans and technical specifications are completed, H&M will provide the FDEP all Items necessary to request a Notice to Proceed (NTP) and provide the County with a bid package containing construction plans, technical specifications, project permits, bid form, contractor questionnaire, and engineer's opinion of probable costs. The questionnaire will be integrated into the technical specifications.

H&M will assist the County in their lead in the bidding process. H&M will participate in the Pre- Bid Meeting and assist the County in answering technical questions as needed during the bidding process. Once the bids have been opened, H&M will assist the County in reviewing the bids and provide a recommendation to the County based on a review of the submitted bids.

Task 3a. Engineer of Record- Vanderbilt Beach $43,694.00

As the Engineer of Record, H&M will conduct pre-, during- and post-construction tasks necessary for certification of the project. An H&M engineer will attend the pre-construction conference and update the construction profiles using County pre-placement surveys. During construction, H&M will support the County's inspection efforts and perform weekly site visits to inspect the work and attend weekly construction meetings. It is assumed that there will be up to 10 weeks of active hauling during construction. H&M will prepare a QA/QC check list, delineating the County, contractor, inspector and H&M duties as a guideline for construction coordination.

H&M will prepare a post-construction certification to meet permit requirements, based largely on surveys, weight tickets, daily reports and observations made by the contractor, County inspectors, and H&M staff. H&M will also provide a construction and as-built summary based on the contractor's as-built drawings. It is assumed that the annual physical monitoring survey and engineering report will be contracted by the County under separate work order. The third party's annual monitoring report will serve as the post-construction report and may include H&M's as-built summary as an appendix.

H&M will review the contractor's pay applications, reconcile and/or review the pay volumes/tonnage based on mine records, weights tickets collected at the beach and physical surveys. Reconciling the truck tickets with records from the mine will be a responsibility of the Contractor.

Task 3b. Engineer of Record- Pelican Bay $26,020

As the Engineer of Record, H&M will conduct pre-, during- and post-construction tasks necessary for certification of the project. An H&M engineer will attend the pre-construction conference and update the construction profiles using County pre-placement surveys. During construction, H&M will support the County's inspection efforts and perform weekly site visits to inspect the work and attend weekly construction meetings. It is assumed that there will be up to 10 weeks of active hauling during construction. H&M will prepare a QA/QC check list, delineating the County, contractor, inspector and H&M duties as a guideline for construction coordination.

H&M will prepare a post-construction certification to meet permit requirements, based largely on surveys, weight tickets, daily reports and observations made by the contractor, County inspectors, and H&M staff. H&M will also provide a construction and as-built summary based on the contractor's as-built drawings. It is assumed that the annual physical monitoring survey and engineering report will be contracted by the County under separate work order. The third party's annual monitoring report will serve as the post-construction report and may include H&M's as-built summary as an appendix.

H&M will review the contractor's pay applications, reconcile and/or review the pay volumes/tonnage based on mine records, weights tickets collected at the beach and physical surveys. Reconciling the truck tickets with records from the mine will be a responsibility of the Contractor.

Task 4a. Surveys- Vanderbilt Beach $ 28,750

H&M will utilize the most recent monitoring survey to prepare design plans for bidding. H&M and their subconsultant will collect updated survey date and construction profiles for the purpose of preparing construction plan detail prior to commence of construction. H&M will coordinate with County staff and utilize progress as-built surveys collected during construction to prepare the post construction report and certification to the regulatory agencies.

Task 4b. Surveys- Pelican Bay $ 9,250

H&M will utilize the most recent monitoring survey to prepare design plans for bidding. H&M and their subconsultant will collect updated survey date and construction profiles for the purpose of preparing construction plan detail prior to commence of construction. H&M will coordinate with County staff and utilize progress as-built surveys collected during construction to prepare the post construction report and certification to the regulatory agencies.

Summary

This work will be performed on a lump sum (LS) basis with a cost of $143,811.00 as outlined in the attached fee spreadsheet. The overall time of the contract to complete design, construction administration, and Engineer of Record signoff will be within 270 days of receipt of the Notice to Proceed.

Assumptions

- Dune restoration and dune vegetation are not part of this work assignment.
- County inspectors will collect weight tickets, observe delivered sand quality and beach construction, and reconcile sand mine records with weight tickets collected at the beach.
- The County or a third party will perform and prepare reports on the following tasks:
  - 2024 Physical Monitoring
  - Turbidity Monitoring
  - Biological Monitoring and Hardbottom Edge Surveys
  - Submerged Aquatic Vegetation Surveys
  - Marine Turtle Monitoring and Related FWC Coordination
  - Shorebird Monitoring
  - Geotechnical Analysis

Vanderbilt & Pelican Bay Beach Renourishment 2025			
Estimated Costs			
	Total Hours	**Rate**	**Cost**
1a Design, Construction Plans & Specifications - Vanderbilt Beach			
Principal	26	$231.00	$6,006.00
Engineer	30	$130.00	$3,900.00
Scientist/Geologist	10	$115.00	$1,150.00
Senior Tech	44	$103.00	$4,532.00
CADD	40	$107.00	$4,280.00
			$19,868.00
	Total Hours	**Rate**	**Cost**
1b Design, Construction Plans & Specifications - Pelican Bay			
Principal	20	$231.00	$4,620.00
Engineer	32	$130.00	$4,160.00
Scientist/Geologist	2	$115.00	$230.00
Senior Tech	20	$103.00	$2,060.00
CADD	6	$107.00	$642.00
			$11,712.00
	Total Hours	**Rate**	**Cost**
2a Bidding Assistance & Notice to Proceed - Vanderbilt Beach			
Principal	2	$231.00	$462.00
Engineer	14	$130.00	$1,820.00
Scientist/Geologist		$115.00	$0.00
Senior Tech	2	$103.00	$206.00
CADD	3	$107.00	$321.00
			$2,809.00
	Total Hours	**Rate**	**Cost**
2b Bidding Assistance & Notice to Proceed - Pelican Bay			
Principal	2	$231.00	$462.00
Engineer	8	$130.00	$1,040.00
Scientist/Geologist		$115.00	$0.00
Senior Tech	2	$103.00	$206.00
CADD		$107.00	$0.00
			$1,708.00
	Total Hours	**Rate**	**Cost**
3a Engineer of Record - Vanderbilt Beach			
Principal	60	$231.00	$13,860.00
Engineer	100	$130.00	$13,000.00
Scientist/Geologist	36	$115.00	$4,140.00
Senior Tech	90	$103.00	$9,270.00
CADD	32	$107.00	$3,424.00
			$43,694.00
	Total Hours	**Rate**	**Cost**
3b Engineer of Record - Pelican Bay			
Principal	40	$231.00	$9,240.00
Engineer	80	$130.00	$10,400.00
Scientist/Geologist	10	$115.00	$1,150.00
Senior Tech	30	$103.00	$3,090.00
CADD	20	$107.00	$2,140.00
			$26,020.00
			$105,811.00
4a Surveys - Vanderbilt Beach		SDI	**$28,750.00**
4a Surveys - Pelican Bay		SDI	**$9,250.00**
Vanderbilt Beach Totals			
	Total Hours	**Rate**	**Cost**
Principal	88	$231.00	$20,328.00
Engineer	144	$130.00	$18,720.00
Scientist/Geologist	46	$115.00	$5,290.00
Senior Tech	136	$103.00	$14,008.00
CADD	75	$107.00	$8,025.00
			$66,371.00
Surveys - Vanderbilt Beach		SDI	
		Total Vanderbilt	**$66,371.00**
Pelican Bay Totals			
	Total Hours	**Rate**	**Cost**
Principal	62	$231.00	$14,322.00
Engineer	120	$130.00	$15,600.00
Scientist/Geologist	12	$115.00	$1,380.00
Senior Tech	52	$103.00	$5,356.00
CADD	26	$107.00	$2,782.00
			$39,440.00
4a Surveys - Pelican Bay		**SDI**	
			$39,440.00
		Total:	**$143,811.00**

Sea Diversified, Inc.
160 Congress Park Drive, #114
Delray Beach, Florida 33445
Phone: 561-243-4920
Facsimile: 561-243-4957

February 4, 2025

Mr. Steve Foge, P.E.
Humiston & Moore Engineers
5679 Strand Court, Suite 110
Naples, Florida 34110

Sent via electronic mail 2/04/2025
(SF@HumistonandMoore.com)

Re: Proposal / Agreement for Professional Services
Pre-Construction Beach Profile Survey
Collier Truck Haul Project
Naples Beach
Collier County, Florida
Sea Diversified P.N. 25-3081

Dear Mr. Foge:

In accordance with your request, Sea Diversified, Inc. (SDI) is pleased to submit the following proposal for professional services. The scope of work shall include pre-construction beach profile surveys associated with the Collier Truck Haul project at Naples Beach in Collier County, Florida. In accordance with your e-mail on January 28, 2025, the survey shall be encompass beach and offshore data collection at 100-foot stations extending 150 feet from the fill template divided into two (2) ranges:

- Range One: R22+200 to R31.5 (115 Profiles)
- Range Two: R31.5 to R37+100 (37 Profiles)

General:
SDI shall provide supervision, field / office support staff and equipment to perform the scope of work described, herewith. All work shall be conducted to the highest level of industry standards and under the responsible charge of a Professional Surveyor and Mapper registered in the State of Florida. All work shall meet or exceed the Standards of Practice (Standards) set forth by the Florida Board of Professional Surveyors and Mappers in Chapter 5J-17, Florida Administrative Code, pursuant to Section 472.027, Florida Statutes, and in compliance with the Bureau of Beaches and Coastal Systems Monitoring Standards for Beach Erosion Control Projects, Sections 01000 and 01100 (Updated October 2014). If time permits, deviations from the scope of work shall be addressed via formal approved addendum to the executed Agreement for Professional Services.

Horizontal and Vertical Data:
Horizontal Datum: Feet, relative to the Florida State Plane Coordinate System, East Zone, North American Datum of 1983 (NAD83)
Vertical Datum: Feet, relative to the North American Vertical Datum of 1988 (NAVD88)

Horizontal / Vertical Control Verification
SDI will verify the horizontal and vertical position of all found and used monuments for the survey. Horizontal and vertical positions will be verified via Real-Time Kinematic GPS procedures.

Beach Profile Data Collection:
Profile data will be collected using Real-time Kinematic Differential Global Positioning techniques. Data points will be collected at a maximum interval of twenty-five (25) feet and at all grade breaks (exceeding one-foot) and material changes along the profile. The reference monument or baseline between monuments shall be recorded as range 0.0 along the profile with positive ranges extending seaward of the monument and negative ranges extending landward of the monument.

Bathymetric Data Collection:
The bathymetric survey shall be conducted using an automated hydrographic system comprised of a survey launch equipped with a marine grade, single-beam sounder, global positioning system and computer-based navigation / data collection system. An RTK (Real Time Kinematic) GPS system shall be used for vessel positioning and navigation with RTK tides applied in

Page 1 of 3

real-time. The survey-grade sounder will include a 200-kHz narrow beam (3˚) transducer. This system, when calibrated to manufacturer's specifications, will yield accuracies of 1 cm plus 0.10% of the water depth when corrected for sound velocity. The sounder shall be calibrated via bar checks at the beginning of each survey day.

Data Processing and Final Deliverables

Upon completion of field survey activities, data will be edited and reduced to the project datum and translated to an x,y,z, ASCII format for submittal to Humiston & Moore (H&M). H&M will be provided the following deliverables:

1. Survey report certified by a Professional Surveyor and Mapper
2. Topographic/Bathymetric data in ASCII (x,y,z) format
3. Control Tabulation
4. DEP formatted data
5. Metadata files

Cost:

Range One: R22+200 to R31.5 (115 Profiles):	$28,750.00 Lump Sum
Range Two: R31.5 to R37+100 (37 Profiles):	$ 9,250.00 Lump Sum

Costs are based on conducting surveys along both ranges concurrently. Estimated timeframe for the survey shall be the Fall of 2025.

Should you have questions or require additional information please do not hesitate to contact us at your convenience. We appreciate this opportunity to assist you with this project and look forward to hearing from you soon.

Best Regards,

William T. Sadler Jr., P.E., P.S.M.
President
Sea Diversified, Inc.

Approved this _____ day of _____, 2025

_____
Mr. Steve Foge, P.E. or Authorized
Humiston & Moore Engineers Representative

DocuSign Envelope ID: 48AA2CF9-7EBA-4898-A562-21BE50C5C49A

* * * * *

SCHEDULE B-ATTACHMENT 1

RATE SCHEDULE

Title	Hourly Rate
Principal	**$231**
Senior Project Manager	**$203**
Project Manager	**$160**
Senior Engineer	**$177**
Engineer	**$130**
Senior Inspector	**$126**
Inspector	**$93**
Senior Planner	**$150**
Planner	**$120**
Senior Designer	**$140**
Designer	**$105**
Environmental Specialist	**$120**
Senior Environmental Specialist	**$167**
Scientist/Geologist	**$115**
Senior Scientist/Geologist	**$153**
Marine Biologist/Hydrogeologist	**$120**
Senior Marine Biologist/Hydrogeologist	**$145**
Senior GIS Specialist	**$155**
GIS Specialist	**$115**
Clerical/Administrative	**$73**
Senior Technician	**$103**
Technician	**$83**
Surveyor and Mapper	**$125**
CADD Technician	**$107**
Survey Crew - 2 man	**$145**
Survey Crew - 3 man	**$180**
Survey Crew - 4 man	**$215**
Senior Architect	**$160**
Architect	**$125**

The above hourly rates are applicable to Time and Materials task(s) only. The above list may not be all inclusive. Hourly rates for additional categories required to provide particular project services shall be mutually agreed upon by the County and firm, in writing, on a project by project basis, as needed, and will be set forth in the Work Order agreed upon by the parties.

☒ **Grant Funded**: The above rates are for purposes of providing estimate(s), as required by the grantor agency.

* * * * *

CAO

Collier County
Procurement Services Division

Direct Select Form

Request Date	Contract No.	Proposal Cost Estimate	Construction Cost Estimate
1/21/25	18-7432-CZ	$150,000	$5M

Requested By (*Use name as it appears in Outlook*):	Division / Department:
Andrew Miller	Transportation Mgmt Svcs

Administrative Agent (*If different from Requestor*):

Library Category:	Vendor Name:
Coastal Zone	Humiston & Moore Engineers PA

Work Assignment Title: 2025 Vanderbilt Beach Renourishment Design

Description of Requested Services:

Professional engineering services for the design, bidding, permitting, and construction administration for 2025 Vanderbilt Beach Renourishment.

Justification: (*Select all that apply and explain below*)	
	☑ Past experience with project
	☐ Continuation of previous work assignment
	☑ Unique qualifications
	☐ Other

Comments / Explanation of Direct Select:

Humiston & Moore is a local firm, amply experienced with renourishing Collier beaches and the requirements for permitting and design needed to accomplish this project on an accelerated time frame for a November 2025 construction start. Reference PO 4500175310 and PO 4500196422.

Requestor: Andrew Miller	**Signature:** MillerAndrew Digitally signed by MillerAndrew Date: 2025.01.21 12:56:11 -05'00'	**Date:**
Division Director: Jay Ahmad	**Signature:** AhmadJay Digitally signed by AhmadJay Date: 2025.01.21 14:28:07 -05'00'	**Date:**
Procurement Director/Designee:	**Signature:** SarahHamilton Digitally signed by SarahHamilton Date: 2025.01.31 11:08:14 -05'00'	**Date:**

Please be sure to attach the fully approved form to the requisition in SAP.

Rev. January 2024

2024 FBUNC RECAP

NAPLES · MARCO ISLAND
EVERGLADES
PARADISECOAST.COM

FBU NATIONAL CHAMPIONSHIP™

TABLE OF CONTENTS

SLIDE 3:	EVENT SUMMARY
SLIDE 4:	DIGITAL INTEGRATION & EMAIL BLAST
SLIDE 5:	PROMOTIONAL GRAPHICS
SLIDE 6:	MATCHUPS & EVENT PACKET
SLIDE 7:	SOCIAL MEDIA
SLIDE 8:	ACTIVATION
SLIDE 9:	COMMERCIAL
SLIDE 10:	LODGING
SLIDE 11:	SURVEY & RESULTS

OVERVIEW

The 2024 FBU National Championship was held in multiple states across the country, culminating in Naples, FL for Championship Week. The FBUNC continues to expand as over 150 Teams participated in 2024, with 61 teams visiting the Paradise Coast of Naples, FL this past December. As the tournament continues to grow, FBU's economic and social impact on Collier County strengthens. Below you'll find a key highlights from this year's tournament:

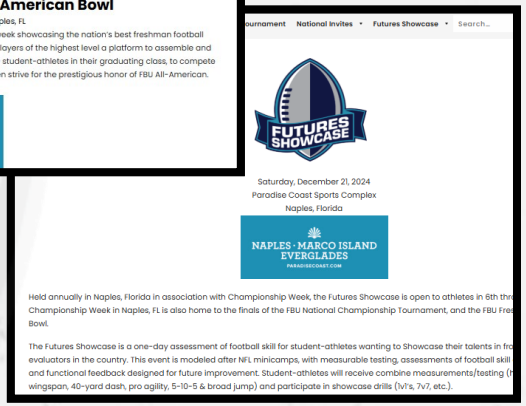
- With over ***5,000*** student-athletes participating, over ***7,500*** people descended upon Naples, FL this past December for the 2024 FBUNC
- Team Travel Source, our housing partner, reported 2,500+ room nights were booked, with an estimated **$650K** in revenue from the 2024 FBUNC
- The Top **65** Freshman in the country participated in the FBU Freshman All-American Bowl powered by Battle – which has garnered over ***20K views*** on YouTube & PrepSpin and over ***25 MILLION*** impressions/views across FBU's social media platforms
- ***425+*** student-athletes in the 2028, 2029, 2030 and 2031 grad classes attended the FBU Futures Showcase on Saturday, December 21st at the Paradise Coast Sports Complex, participating in a 1-day combine and competing for invitations to the 2026 National Combine, 2026 UA Next 8th Grade Game and 2025 FBU Freshman All-American Bowl
- **8** student-athletes received invites to the ***2025 FBU Freshman Bowl*** at the Paradise Coast Sports Complex in Naples, FL
- **3** athletes received invites to the ***2026 National Combine*** at the Alamo Dome in San Antonio, TX – #1 High School Combine in the world
- Over ***100 MILLION*** impressions and views were caught during the 2024 FBUNC across our different social media platforms and collaborated posts & engagements

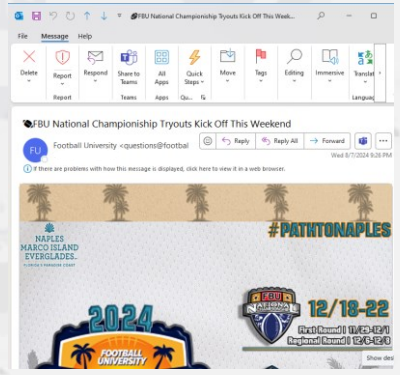
DIGITAL INTEGRATION & EMAIL BLASTS

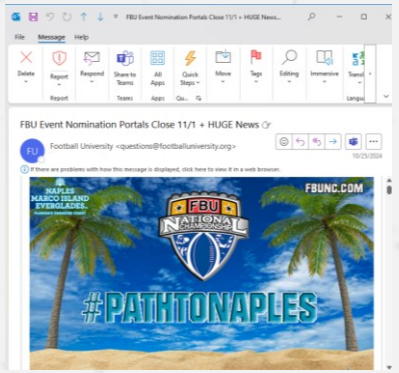
Digital Integration

- **FBUNC Web Page**
- **FBU Futures Showcase**
- **FBU Freshman Bowl Web Page**
- **Logos/Pages include link to Paradise Coast Website**









Email Blasts

- **100+ Email Blasts mentioning "Paradise Coast" and #PathToNaples to promote the 2024 FBU National Championship**



PROMOTIONAL GRAPHICS

Integrated the Paradise Coast logo and/or mention of the #PathToNaples in multiple promotional graphics and EVERY tryout flyer throughout the 2024 FBUNC







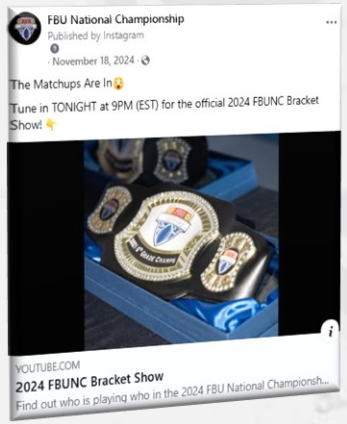




BRACKETS & DRAW SHOW







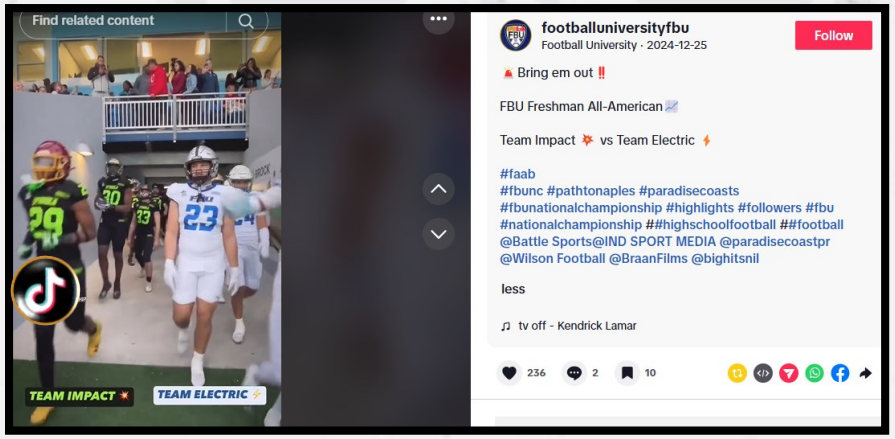




SOCIAL MEDIA ACTIVITY









ACTIVATION


FBU
NATIONAL CHAMPIONSHIP


Kuh

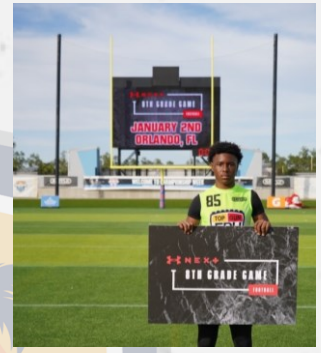

THE PATH
TO NAPLES






WELCOME TO THE ELITE

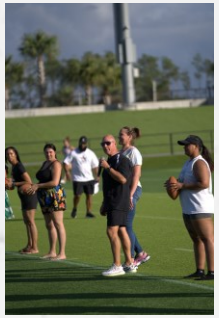

FUTURES
SHOWCASE


JANUARY 2ND
ORLANDO, FL
8TH GRADE GAME




Football University
@FBUcamp
Official Recap of the 2024
ican Bowl
2028 WR Brysen Wright leads off top performers from FBU Freshman All-American Bowl
From 247sports.com
3:17 PM · Dec 23, 2024 · 2,943 Views






8TH GRADE
2024
UTAH
NATIONAL CHAMPIONS
BATTLE


GATORADE
BATTLE

COMMERCIALS

NBCUniversal

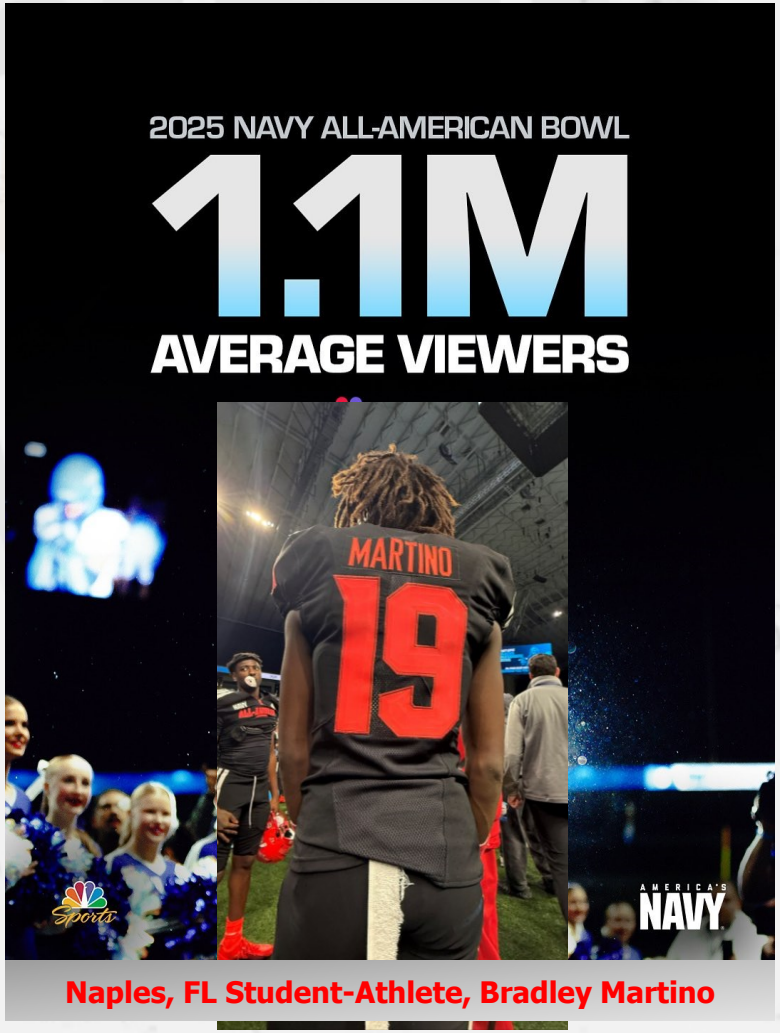
Denver Sports Rundown Report

Broadcast Date: SATURDAY 01/11/2025 Show Title: FOOTBALL: ALL AMERICAN BOWL Group: 01/11/2025:4600

Report Run Time: 01/10/2025 17:23:44 Air: 01:00:00 PM

Item	Pod	Code	Event Title	Material ID	Product Name	Dur
1				12:59:55		
		OP	SPT NBC SPORTS HALLMARK	015M119SPS1105H	SPT NBC SPORTS HALLMARK	00:15
2						
		SH	NYL/ PRE-KICK			
3						
			POS #1	13:07:02		
	01A	NC	PANINI AMERICA, INC	PANINIA1219H	PANINI AMERICA	00:30
	01B	NC	OUTLYR, LLC	CCT1296AIPNA H	524 NAPLES, MARCO ISLAND, EVERGLA	:15
	01C	NC	PAPA JOHN'S INTERNATIONAL, INC	XQUT0802000H	PAPA JOHN'S	00:15
	01D	NC	CAPITAL ONE	PTCP4147000H	CAPITAL ONE SAVOR CARD,SNL50	00:30
	01E	PR	ENT ST. DENIS MEDICAL: WEEKLY TOPICAL (MIDSEASON R	N030ASDM114105H	ENT ST. DENIS MEDICAL: WEEKLY	00:30
4						
		SH	NYL 1ST QRTR			

19						
			POS #9 End 2nd Qtr.		14:20:23	
	09A	PR	COMMANDERS V BUCS SUN 7:30 ET (NBC & PCK) :30 ***D	030A112NFL1105H	SPT SNF WILD CARD | COMMANDER	00:30
		BL	BLACK			00:01
	09B	SB	STATION BREAK 2	NBCLCL24204H		02:04
20						
		SH	NYL/HALFTIME			
21						
			POS #10		14:27:22	
	10A	NC	OUTLYR, LLC	CCT1296AIPN H	2024 NAPLES, MARCO ISLAND, EVERGLA	
	10B	NC	CAPITAL ONE	TURW3656000H		00:30
	10C	NC	NBC UNIVERSAL, INC	EIFKMHF2430H	KIDS MENTAL HEALTH FOUNDATION	00:30
22						
		SH	NYL/SEG			
23						
			POS #11		14:33:14	
	11A	PR	ENT AMERICAS: CO-VIEWING SELL - 2/23 8/7C :30 (NB	N030XAMC223415H	ENT AMERICAS: CO-VIEWING SELL	00:30
		BL	BLACK			00:01
	11B	SB	STATION BREAK 3	NBCLCL24134H		01:34
24						
		SH	NYL/3RD QRTR			
25						
			POS #12		14:46:01	



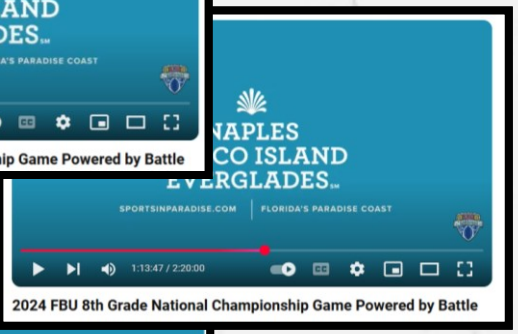
Naples, FL Student-Athlete, Bradley Martino



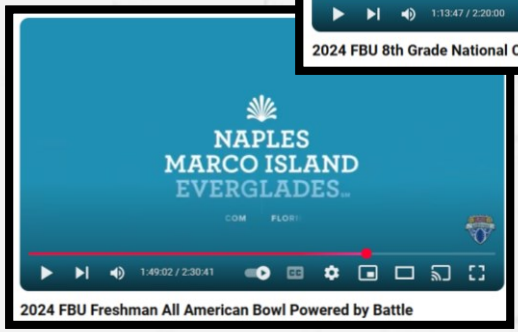
2024 FBU 6th Grade National Championship Game Powered by Battle



2024 FBU 7th Grade National Championship Game Powered by Battle



2024 FBU 8th Grade National Championship Game Powered by Battle



2024 FBU Freshman All American Bowl Powered by Battle

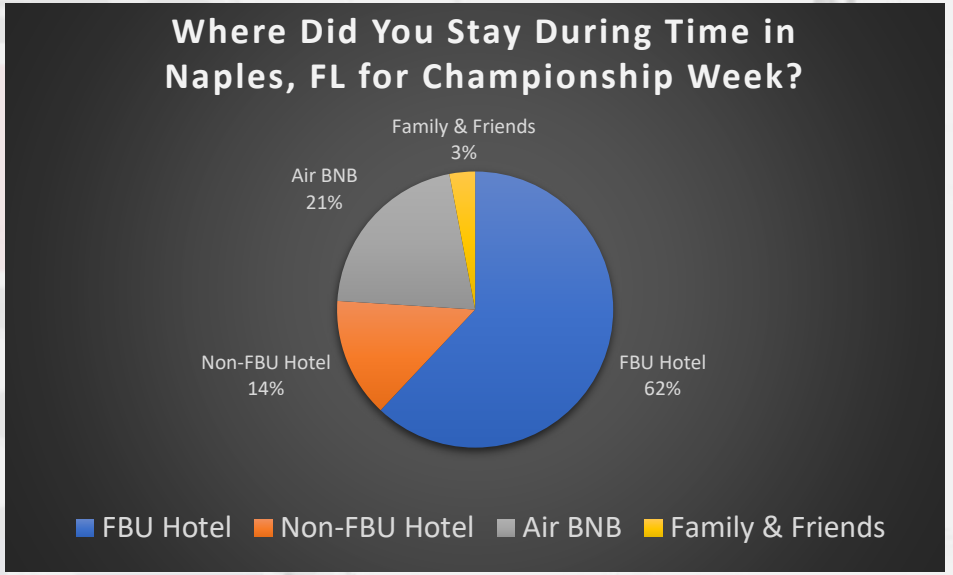
CHAMPIONSHIP WEEK LODGING

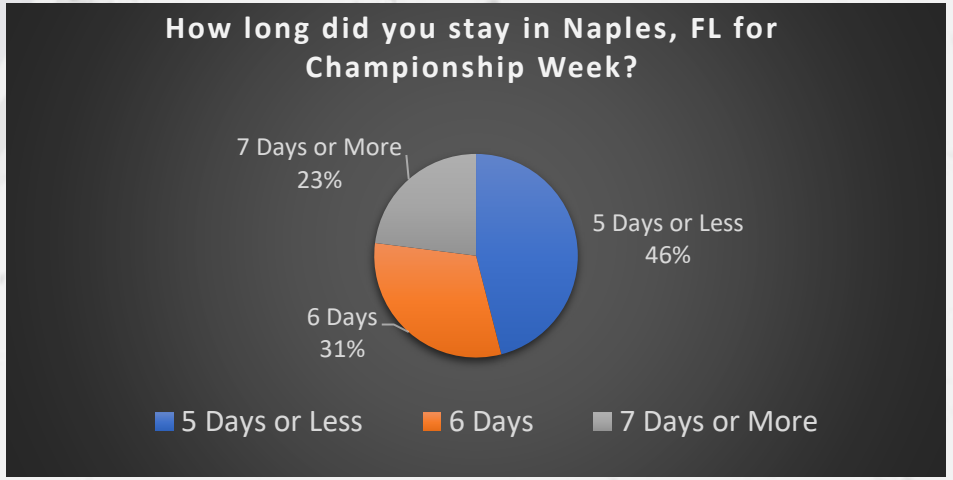
2500+
FBUNC Room Nights

650K+
FBUNC Room Rev.

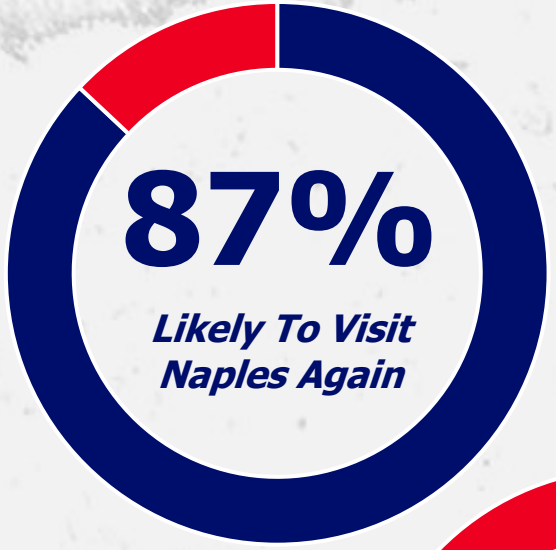
5000+
FBUNC + NHF Room Nights

1.2M
FBUNC + NHF Room Rev.





CHAMPIONSHIP WEEK ACTIVITIES







TOP 3 ACTIVITIES

1.) Beach

2.) Shopping

3.) The Zoo

2024 FBUNC RECAP

NAPLES · MARCO ISLAND
EVERGLADES

PARADISECOAST.COM

FBU NATIONAL CHAMPIONSHIP™

PARADISE COAST SPORTS COMPLEX

Paradise Coast Sports Complex (PCSC)

TDC Report

Q1 Report FY 24-25

Q1 RECAP SPORTS EVENTS

October	November	December
Naples Canes	Legends Lax	AYF National Champs.
Starability 5k	Alliance Soccer (TSG)	FBUNC (3Step)
ACS 5k Walk	~~Paradise Classic Lax~~	~~RISE Flag Football~~
River Plate Soccer (TSG)	Pinnacle Lax	Golden Cup (Yth Sports)
	Team 1 Connect Softball	MSM Academy Camp
	Field Hockey (3Step)	

Q1 RECAP OTHER EVENTS

October	November	December
Fall Fest	Legends Concert	~~Legends Concert~~
Rocktoberfest	USA Today Wine + Food	Healthcare Networks
	Magic of Lights	SnowFest
		Treviso Bay
		FC Naples Kit Launch
		Magic of Lights

Q1 2024-2025 FINANCIALS

YTD 2024				
	Actual	Budget	over Budget	% of Budget
Revenue	$1,054,122	$1,486,599	$ (432,477)	71%
Cost of Goods Sold	$ 329,110	$ 606,761	$ (277,651)	54%
Gross Profit	$ 725,012	$ 879,838	$ (154,826)	82%
Expenses	$ 438,484	$ 570,138	$ (131,654)	77%
Net Operating Income	$ 286,528	$ 309,700	$ (23,172)	-7%

Q1 Headlines

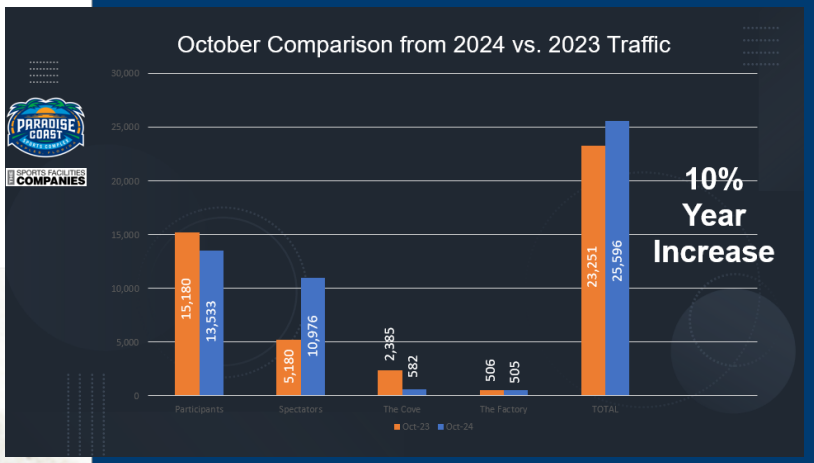
- $1m in revenue
- Record December performance carried lower than expected in Oct/Nov
- COGS and Expenses managed
- NOI target well in sights
- Q2 catch up with increased schedule and FC Naples Schedule

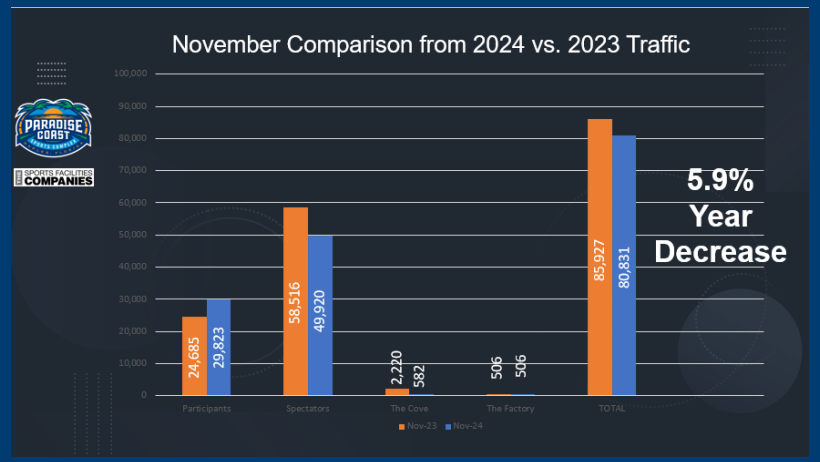
UPCOMING EVENTS Q2

January	February	March
~~Florida Fast Pitch~~	NXT Lax	FC Naples March 8
~~4v4 Nationals (Yth Spts)~~	Peak Perf. Soccer Camp	FC Naples March 15
XPO Lax (Steps)	National Scout Combine	FC Naples March 29
Soccer/Lax Masters	B10 Officials Clinics	Trilogy Lax
Paradise Cup (TSG)	Weston Cup (TSG)	
True Lax	SouthWest FL Shootout	
EDP Soccer (3Step)	~~Winter Classic Lax~~	Naples MotoFest
Humane Society 5k	CCPS Soccer Finals	Country Jam
Legends Concert	Legends Concert	Legends Concert

Q4 ON-SITE FOOT TRAFFIC

2023 Quarterly Total Foot Traffic: **222,478**
2024 Quarterly Total Foot Traffic: **204,858**







2023 Oct. Total Foot Traffic: 23,251
2024 Oct. Total Foot Traffic: 25,596

Increased Fall Fest Attendance
Addition of River Plate Tournament

2023 Nov. Total Foot Traffic: 85,927
2024 Nov. Total Foot Traffic: 80,831

No Doral Cup
Alliance Cup & National Field Hockey
Were both much smaller in 2024

2023 Dec. Total Foot Traffic: 113,300
2024 Dec. Total Foot Traffic: 98,431

FBU Attendance Decrease

DEC. 2024 ONLINE & SOCIAL TRAFFIC SNAPSHOT

Total Viewed Web Pages:

Dec. 2024
Sessions: **25,844**

VS. Dec. 2023
Sessions: **18,685**

Dec. 2024
Pageviews : **53,172**

VS. Dec. 2023
Pageviews : **38,071**

New Site Visitors:

Dec. 2024

Search: **18,709**

VS. Dec. 2023
Search: **9,256**

Google My Business

PCSC Profile
Interactions: **10,463**
PCSC Profile Views: **19,477**
PCSC Profile Searches: **13,192**

Cove Profile
Interactions: **404**
Views: **9,945**
Searches: **6,113**

Factory Profile
Interactions: **90**
Views: **1,009**
Searches: **331**

Facebook

Monthly Posts: 62

Facebook Reach: 369,514

Facebook Views: 91,271

Page Likes: 9,731 (UP +614)

Total Followers: 11,647 (UP +416)

Linked In

Followers: 636 (UP +56)

E-Newsletter

Three Dec. Newsletters sent to total of 6,559 Subscribers

53.67% Avg. Open Rate

2.84% Avg. Click Rate

Instagram

Posts This Month: 25

Total Posts: 1,522

Total Followers: 6,191 (UP +527)

X (Twitter)

Tweets This Month: 17

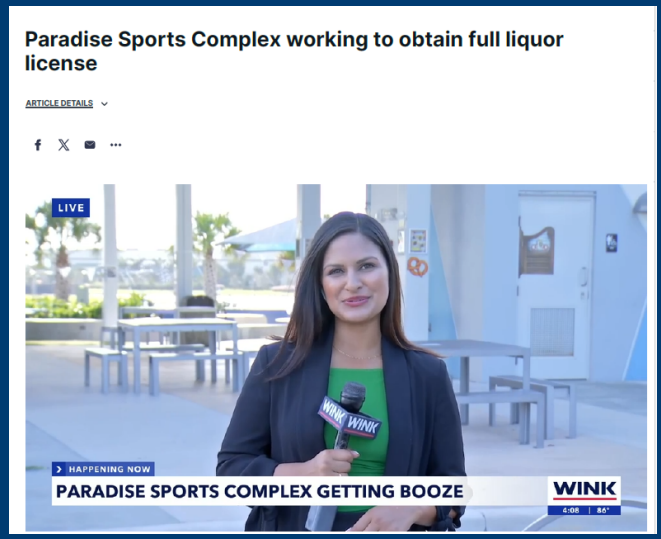
Total Posts: 2,333

Tweet Impressions: 4,326

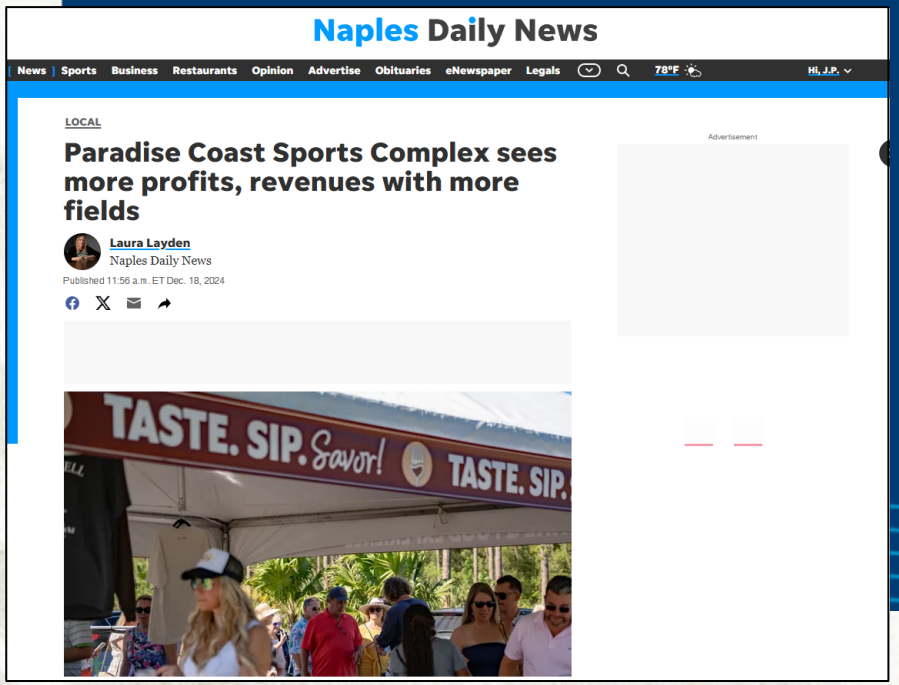
Total Followers: 1,271 (UP +36)

OCT.-DEC. 2024 MAIN MEDIA PROMOTIONS

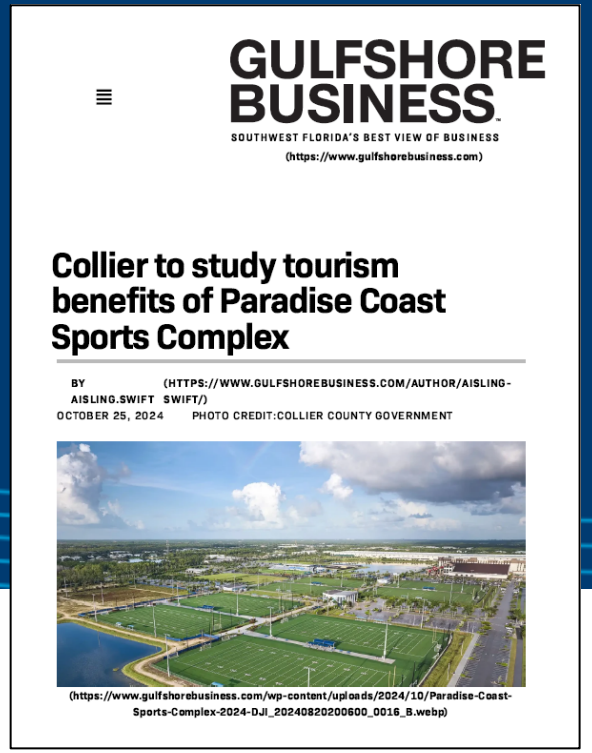
December 19, 2024
WINK News
PCSC working to obtain full liquor license



December 18, 2024
Naples Daily News
PCSC sees more profits, revenues with more fields



October 25, 2024
Gulfshore Business Magazine
Collier to study tourism benefits
Of PCSC



THANK YOU!



LOU HAMMOND GROUP

THE ART & IMPACT OF PR



INTRODUCTION TO PR

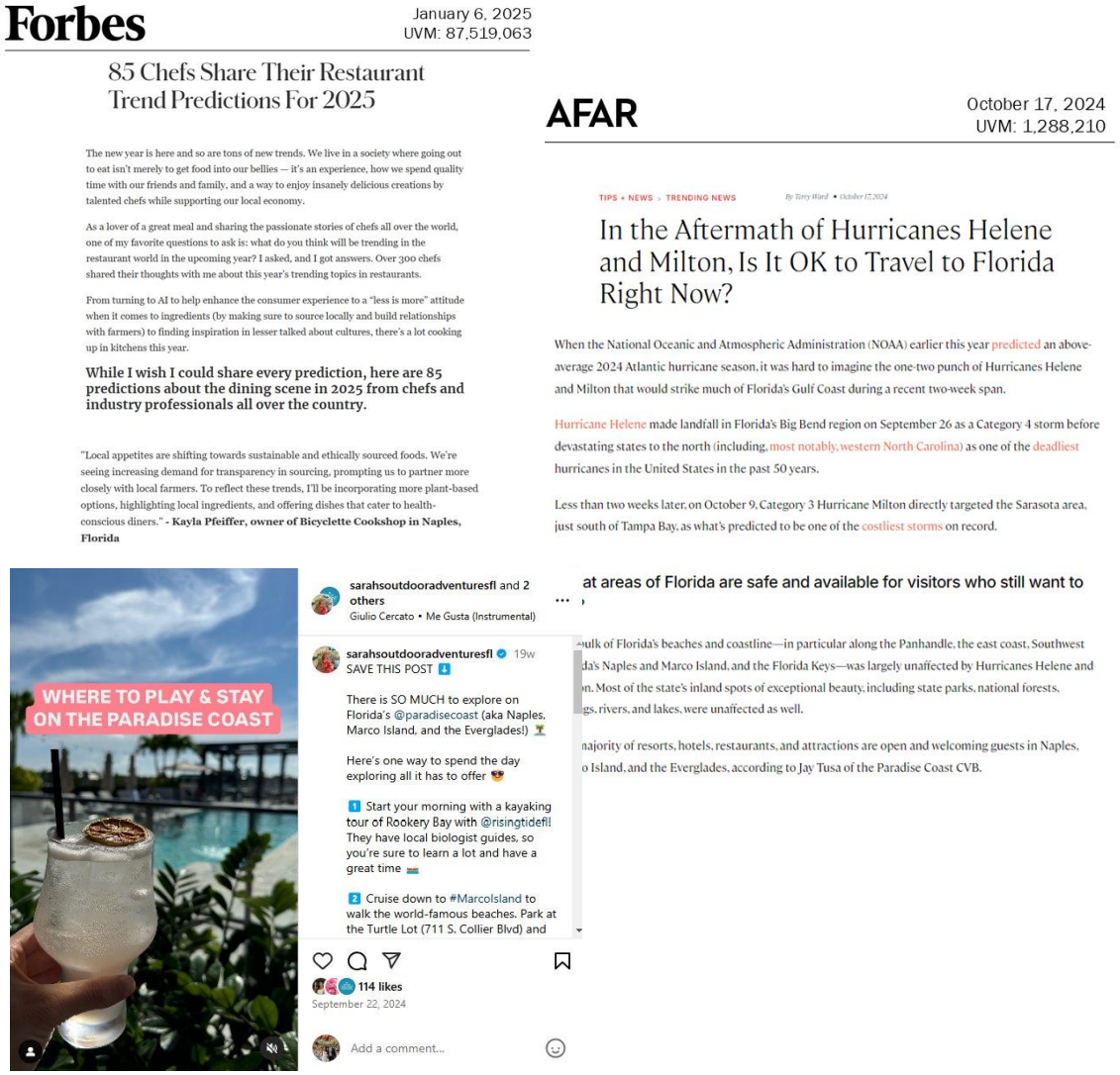
WHAT IS PUBLIC RELATIONS?

- **What is PR?**
  - **Public Relations (PR) is a strategic communication** process that builds and maintains a positive reputation between an organization and its audiences.
  - It focuses on earned media rather than paid advertising, leveraging storytelling, media outreach, and relationships.
- **Why Does PR Matter?**
  - Shapes public perception of a brand, destination, or organization.
  - Enhances credibility by securing third-party validation from journalists, influencers, and the public.
  - Helps organizations communicate effectively during both successes and challenges.
- **Who Is Our Audience?**
  - Media & Journalists: Press releases, interviews, and thought leadership.
  - Visitors & Locals: Social media, events, and community engagement.
  - Stakeholders & Partners (local businesses): Corporate reputation and crisis management.

THE KEY PILLARS OF PR

THE FOUNDATION OF EFFECTIVE PR

- **Media Relations:** Securing press coverage and building relationships with journalists.
  - Building relationships with journalists, bloggers, and media outlets.
  - Crafting press releases and pitching newsworthy stories to secure earned media coverage.
  - Responding to media inquiries and shaping the narrative.
- **Crisis Communication:** Managing reputation during challenges.
  - Example: Red Tide, Hurricanes, etc.
- **Community Engagement:** Strengthening ties with local audiences.
- **Content Creation:** Storytelling through articles, social media, and blogs.
- **Influencer & Partner Collaboration:** Leveraging third-party credibility.
  - Example: co-branded campaigns that amplify PR efforts.



Forbes

January 6, 2025
UVM: 87,519,063

85 Chefs Share Their Restaurant Trend Predictions For 2025

The new year is here and so are tons of new trends. We live in a society where going out to eat isn't merely to get food into our bellies — it's an experience, how we spend quality time with our friends and family, and a way to enjoy insanely delicious creations by talented chefs while supporting our local economy.

As a lover of a great meal and sharing the passionate stories of chefs all over the world, one of my favorite questions to ask is: what do you think will be trending in the restaurant world in the upcoming year? I asked, and I got answers. Over 300 chefs shared their thoughts with me about this year's trending topics in restaurants.

From turning to AI to help enhance the consumer experience to a "less is more" attitude when it comes to ingredients (by making sure to source locally and build relationships with farmers) to finding inspiration in lesser talked about cultures, there's a lot cooking up in kitchens this year.

While I wish I could share every prediction, here are 85 predictions about the dining scene in 2025 from chefs and industry professionals all over the country.

"Local appetites are shifting towards sustainable and ethically sourced foods. We're seeing increasing demand for transparency in sourcing, prompting us to partner more closely with local farmers. To reflect these trends, I'll be incorporating more plant-based options, highlighting local ingredients, and offering dishes that cater to health-conscious diners." - **Kayla Pfeiffer, owner of Bicyclette Cookshop in Naples, Florida**

AFAR

October 17, 2024
UVM: 1,288,210

TIPS + NEWS > TRENDING NEWS

In the Aftermath of Hurricanes Helene and Milton, Is It OK to Travel to Florida Right Now?

When the National Oceanic and Atmospheric Administration (NOAA) earlier this year predicted an above-average 2024 Atlantic hurricane season, it was hard to imagine the one-two punch of Hurricanes Helene and Milton that would strike much of Florida's Gulf Coast during a recent two-week span.

Hurricane Helene made landfall in Florida's Big Bend region on September 26 as a Category 4 storm before devastating states to the north (including, most notably, western North Carolina) as one of the deadliest hurricanes in the United States in the past 50 years.

Less than two weeks later, on October 9, Category 3 Hurricane Milton directly targeted the Sarasota area, just south of Tampa Bay, as what's predicted to be one of the costliest storms on record.

WHERE TO PLAY & STAY ON THE PARADISE COAST

sarahsoutdooradventuresfl and 2 others
Giulio Cercato • Me Gusta (Instrumental)

sarahsoutdooradventuresfl 19w
SAVE THIS POST

There is SO MUCH to explore on Florida's @paradisecoast (aka Naples, Marco Island, and the Everglades!)

Here's one way to spend the day exploring all it has to offer

1 Start your morning with a kayaking tour of Rookery Bay with @risingtidefl! They have local biologist guides, so you're sure to learn a lot and have a great time

2 Cruise down to #MarcoIsland to walk the world-famous beaches. Park at the Turtle Lot (711 S. Collier Blvd) and

114 likes
September 22, 2024

Add a comment...

at areas of Florida are safe and available for visitors who still want to

ulk of Florida's beaches and coastline—in particular along the Panhandle, the east coast, Southwest da's Naples and Marco Island, and the Florida Keys—was largely unaffected by Hurricanes Helene and n. Most of the state's inland spots of exceptional beauty, including state parks, national forests, gs, rivers, and lakes, were unaffected as well.

ajority of resorts, hotels, restaurants, and attractions are open and welcoming guests in Naples, o Island, and the Everglades, according to Jay Tusa of the Paradise Coast CVB.

HOW PR DIFFERS FROM MARKETING

PR vs. MARKETING vs. ADVERTISING

PR: Earned media, reputation management, long-term credibility.

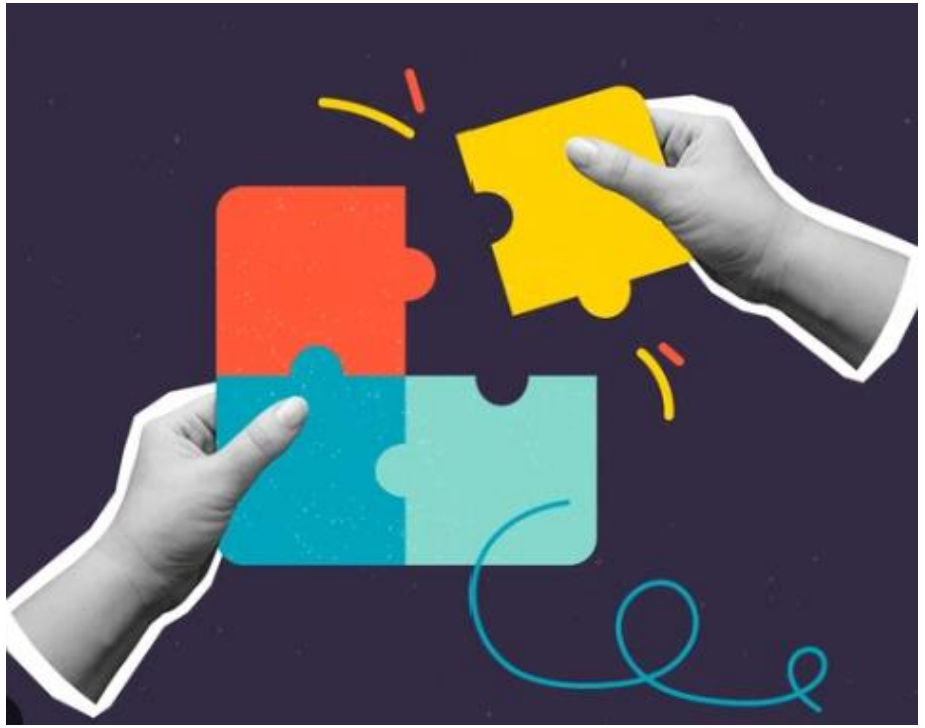
- Earned media (news articles, influencer shoutouts, word-of-mouth).
- Builds long-term reputation and credibility.
- Focuses on content development and strategic messaging.
- Manages crises and public perception.

Marketing: Focused on driving sales through targeted campaigns.

- Paid and owned media (social media ads, SEO, email marketing).
- Designed to drive sales, conversions, and revenue.
- Uses data-driven targeting to reach specific audiences.
- Shorter-term campaigns for measurable results.

Advertising: Paid placements with direct messaging control.

- Fully paid placements (TV ads, billboards, Google Ads).
- Complete control over messaging and branding.
- Focuses on direct promotion of products/services.
- Highly transactional with a clear call to action.



WHY PR MATTERS FOR TOURISM

PR'S ROLE IN DESTINATION MARKETING

- **Building a Positive Destination Image**
  - Shapes the destination's story and image – promoting culture, beach, luxury and outdoor pursuits
- **Attracting Visitors Through Media Exposure**
  - Showcasing authentic traveler experiences through PR storytelling.
- **Strengthening Community & Economic Growth**
  - Encouraging local businesses to engage in destination promotion
  - Supports economic growth by driving tourism.
- **Managing Reputation & Crisis Communications**
  - Addressing negative press, traveler concerns, or crisis situations (natural disasters, political unrest, safety concerns).

Subject: Caviar Bumps are out. Caviar & Bugles are in.

Hi Lynn,

National Caviar Day (July 18) calls for indulgence and a celebration of culinary creativity. The luxury traveler who prefers hidden gems can sate their curiosity in Naples, Florida.

Take it from a *Chopped* champion:

"Bugles and caviar? I like to say it was the perfect mistake. The idea came from a trip to the beach; I paired the nostalgic corn chip with several different tins of caviar to surprise my friends. It was unexpectedly delicious, earning its place on the menu at Bicyclette Cookshop, served in custom-labeled tins and layered with rich crème fraîche hidden underneath." -- Chef Kayla Pfeiffer, Bicyclette Cookshop.

Available for interviews. She is a passionate creative who is an absolute pleasure to speak with!

Caviar, Bugles and crème fraîche
Photo Link: https://spaces.hightail.com/space/lfyq8X8G9a
Photo Credit: Florida's Paradise Coast CVB

Did I forget to mention the cocktail topped with Pop Rocks?

Forbes

July 9, 2024
UMV: 87,519,063

50 Creative Ways To Celebrate National Caviar Day

Caviar is among the most opulent of delicacies, and it's hard to picture a romantic or special occasion without this luxury ingredient making an appearance.

But something rather magical has happened in recent years, as caviar has suddenly become less aspirational and more approachable. It's still an elegant addition to an evening of martinis and seafood towers, but it's now also often seen as an accompaniment to dishes such as baked potatoes or fried chicken—making it something we're gleeful to see featured a lot more often on a great many menus in all sorts of inventive ways.

National Caviar Day will be celebrated on July 18, and it's a perfect opportunity to try caviar in some of its most unique and delicious variations.

Caviar, Bugles and Crème Fraîche



"Bugles and caviar? I like to say it was the perfect mistake. The idea came from a trip to the beach; I paired the nostalgic corn chip with several different tins of caviar to surprise my friends. It was unexpectedly delicious, earning its place on the menu at Bicyclette Cookshop, served in custom-labeled tins and layered with rich crème fraîche hidden underneath," said Chef Kayla Pfeiffer, Bicyclette Cookshop in Naples, Florida.

COVERAGE HIGHLIGHTS

- **118** Overall Placements
- **$8.2 Million+** in Ad-Value Equivalency
- **2.5 Billion+** Unique Monthly Visitors

TRAVEL+ LEISURE yahoo!life

August 21, 2024
UVM: 424,329,111

This Florida Island Is Just 6 Miles Long — and a Gateway to Everglades National Park

Plus, it gets approximately 300 days of sunshine per year.



At just six miles long, yet home to some of the top all-inclusive resorts in Florida, Marco Island is the largest and only inhabited of Florida's Ten Thousand Islands, as well as a gateway to Everglades National Park, the largest subtropical wilderness in the U.S. It's hard to believe walking on the alabaster beaches, watching dolphins frolic in the waves, that just a few miles away lies a mangrove wonderland, black-whiskered vireos serenade the alligators and crocodiles, and a tangle of coastal hammocks teem with wildlife. Located on the Gulf of Mexico, with approximately 300 days of sunshine per year, Marco Island offers a respite of luxury tucked into the wilds of Old Florida.

Hyla Crane, executive director of Marco Island Center for the Arts, traded New York City for the small barrier island and never looked back. "It's a tropical vacation without leaving the country — the beaches are beautiful, the pace of life is calm and relaxing, and the art scene is vibrant." she told *Travel + Leisure* about what makes Marco Island so special. "There are spas, museums, a theater, great restaurants, and plenty of water sports. When you cross the Jolley Bridge, you feel like you are on holiday."

FOOD&WINE

September 11, 2024
UVM: 13,753,411

Stone Crab Season Kicks Off on October 15 – Here's Where to Taste the Famous Claws

Here's what's special about the crab variety that's famous on Florida's Gulf Coast.

By **Carrie Honaker** | Published on September 11, 2024



Stone crabs at Truluck's. PHOTO: COURTESY OF THE NAPLES, MARCO ISLAND, EVERGLADES CVB

Surrounded by waving seagrass, salt flats, white ibis, and murky swamps, Highway 41 (known as Tamiami Trail) was the original Alligator Alley and the one way into Florida's Everglades City. The population hovers under 500 in this quaint fishing town, the self-proclaimed Stone Crab Capital of the World. Stone crab traps line the yard surrounding the Museum of the Everglades, waiting to be assembled into the annual crab trap holiday tree. Everywhere you look, the influence of this small creature can be seen from the errant buoys, to the bits of seagrass blowing around, to the little markets and restaurants emblazoned with dates of stone crab season.


THANK YOU
NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST
LHG
LOU HAMMOND GROUP



NAPLES · MARCO ISLAND
EVERGLADES℠
FLORIDA'S PARADISE COAST

JANUARY 2025 Monthly Highlights



1

MONTHLY HIGHLIGHTS

JANUARY 2025 | TOURISM METRICS

downs & st. germain RESEARCH

Metric	January 2024	January 2025	Percent Change
Visitors	271,400	286,800	+ 5.7%
Visitor Days	1,671,700	1,915,800	+ 14.6%
Direct Spending	$319,428,700	$324,649,100	+ 1.6%
Economic Impact	$442,768,200	$448,665,100	+ 1.3%
Room Nights	262,700	276,100	+ 5.1%
Occupancy	67.2%	66.2%	- 1.5%
Average Daily Rate	$497.71	$485.57	- 2.4%
RevPAR	$334.46	$321.45	- 3.9%

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

PARADISECOAST.COM

FYTD 2025 | TOURISM METRICS

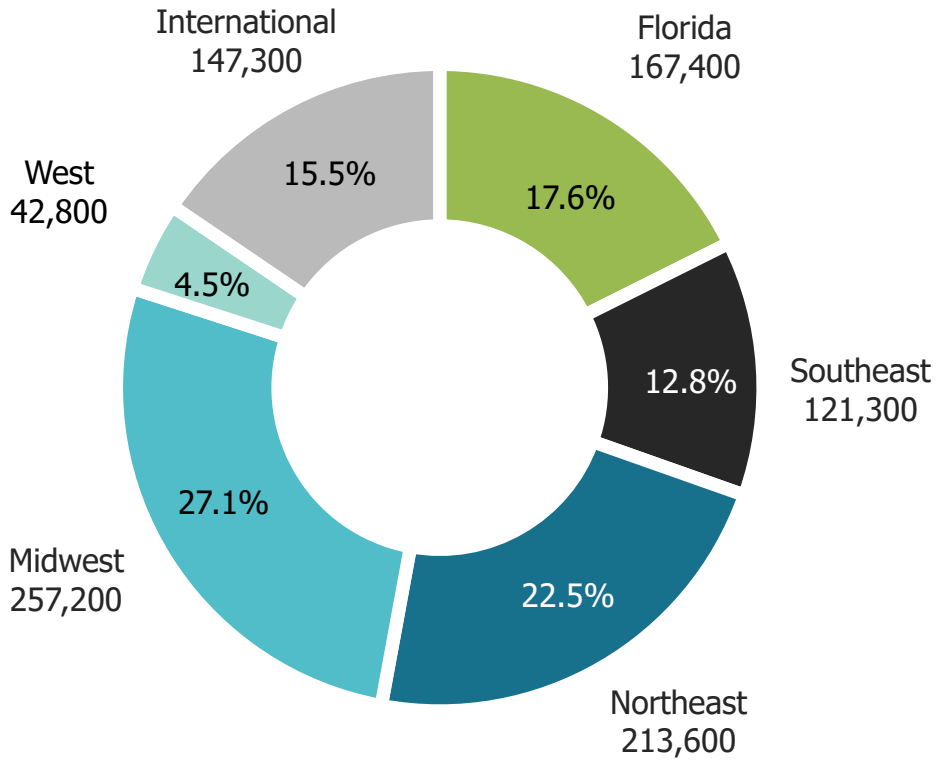
downs & st. germain RESEARCH

Metric	FYTD 2024	FYTD 2025	Percent Change
Visitors	909,300	949,600	+ 4.4%
Visitor Days	5,716,800	6,273,500	+ 9.7%
Direct Spending	$915,751,500	$952,624,700	+ 4.0%
Economic Impact	$1,270,424,200	$1,317,037,500	+ 3.7%
Room Nights	919,900	982,100	+ 6.8%
Occupancy	60.0%	60.6%	+ 1.0%
Average Daily Rate	$357.47	$348.14	- 2.6%
RevPAR	$214.48	$210.97	- 1.6%

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST
PARADISECOAST.COM

FYTD 2025 | VISITOR ORIGIN

	FYTD 2024		FYTD 2025		Percent Change (±Δ%)	
Region	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Florida	169,900	18.8%	167,400	17.6%	-1.5%	-6.5%
Southeast	117,000	13.0%	121,300	12.8%	3.7%	-1.6%
Northeast	200,700	22.3%	213,600	22.5%	6.4%	1.0%
Midwest	237,600	26.4%	257,200	27.1%	8.2%	2.7%
West	47,900	5.3%	42,800	4.5%	-10.6%	-15.2%
Canada	46,000	5.1%	59,100	6.2%	28.5%	21.9%
Europe	62,200	6.9%	63,500	6.7%	2.1%	-3.1%
C/S America	8,500	0.9%	12,700	1.3%	49.4%	41.8%
Other	11,400	1.3%	12,000	1.3%	5.3%	-0.1%
Total	901,200	100.0%	949,600	100.0%		



JANUARY 2025 | Highlights & Areas of Concern

downs & st. germain RESEARCH

Highlights

- Key performance metrics (visitation, room nights, direct spend, and economic impact) were all up at least slightly compared to January 2024.

- International visitors accounted for 19% of visitation in January, and they have accounted for 15.5% of all visitation so far in FY 2025.

Potential Areas of Concern

- Occupied room nights increased 5.1% year-over-year, which is a positive, but it was slightly outpaced by the year-over-year increase in room supply, causing the overall Occupancy Rate to fall 1.5% compared to January 2024.

- Additionally, the Average Daily Rate (ADR) dropped 2.4% year-over-year, dropping the Revenue Per Available Room (RevPAR) 3.9% year-over-year.
  - This is to be expected with increased competition but is something to keep an eye on going forward.
  - Maintaining steady demand increases should be able to help counteract the impact of a slightly lower ADR.

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

PARADISECOAST.COM



NAPLES · MARCO ISLAND EVERGLADES℠

FLORIDA'S PARADISE COAST

January 2025 Monthly Visitor Dashboard

TABLE OF CONTENTS

1) **Monthly Highlights:** pg. 3-7

2) **Monthly Executive Summary:** pgs. 8-14

3) **Fiscal Year-to-Date (FYTD) Executive Summary:** pgs. 15-19

4) **Destination Comparisons**: pgs. 20-33

   a) Monthly Comparisons: pgs. 20-26
   b) Fiscal Year-to-Date (FYTD) Comparisons: pgs. 27-33

5) **Industry Data:** pgs. 34-39

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

PARADISECOAST.COM



1

MONTHLY HIGHLIGHTS

JANUARY 2025 | TOURISM METRICS

downs & st. germain RESEARCH

Metric	January 2023	January 2024	Percent Change
Visitors	271,400	286,800	+ 5.7%
Visitor Days	1,671,700	1,915,800	+ 14.6%
Direct Spending	$319,428,700	$324,649,100	+ 1.6%
Economic Impact	$442,768,200	$448,665,100	+ 1.3%
Room Nights	262,700	276,100	+ 5.1%
Occupancy	67.2%	66.2%	- 1.5%
Average Daily Rate	$497.71	$485.57	- 2.4%
RevPAR	$334.46	$321.45	- 3.9%

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST
PARADISECOAST.COM

FYTD 2025 | TOURISM METRICS

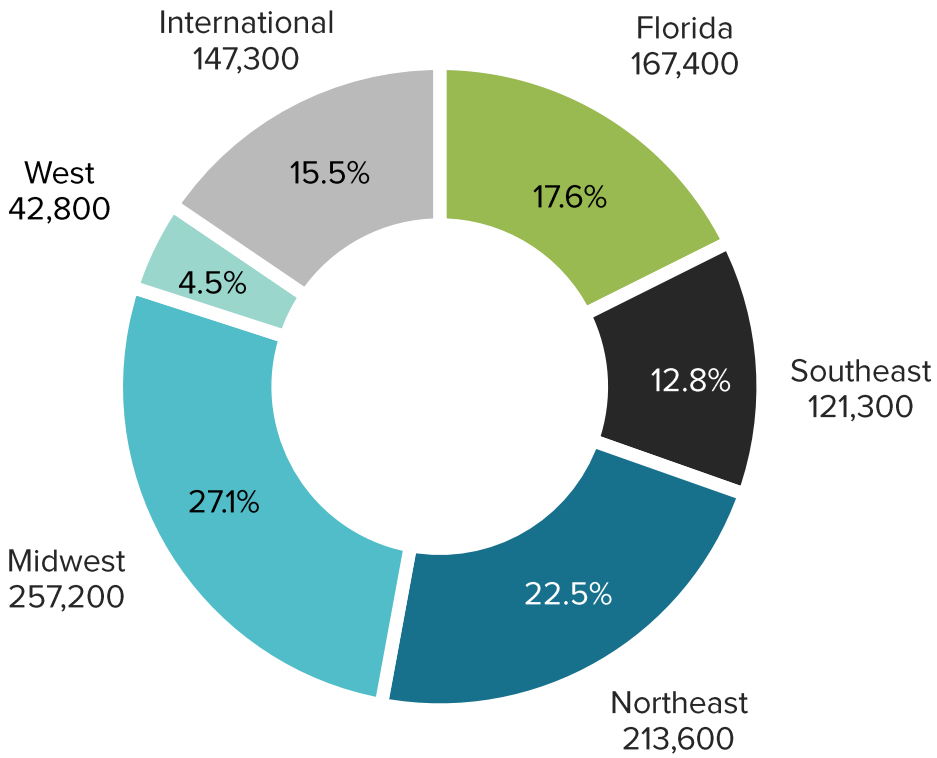
downs & st. germain RESEARCH

Metric	FYTD 2024	FYTD 2025	Percent Change
Visitors	909,300	949,600	+ 4.4%
Visitor Days	5,716,800	6,273,500	+ 9.7%
Direct Spending	$915,751,500	$952,624,700	+ 4.0%
Economic Impact	$1,270,424,200	$1,317,037,500	+ 3.7%
Room Nights	919,900	982,100	+ 6.8%
Occupancy	60.0%	60.6%	+ 1.0%
Average Daily Rate	$357.47	$348.14	- 2.6%
RevPAR	$214.48	$210.97	- 1.6%

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST
PARADISECOAST.COM

FYTD 2025 | VISITOR ORIGIN

	FYTD 2024		FYTD 2025		Percent Change (±Δ%)	
Region	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Florida	169,900	18.8%	167,400	17.6%	-1.5%	-6.5%
Southeast	117,000	13.0%	121,300	12.8%	3.7%	-1.6%
Northeast	200,700	22.3%	213,600	22.5%	6.4%	1.0%
Midwest	237,600	26.4%	257,200	27.1%	8.2%	2.7%
West	47,900	5.3%	42,800	4.5%	-10.6%	-15.2%
Canada	46,000	5.1%	59,100	6.2%	28.5%	21.9%
Europe	62,200	6.9%	63,500	6.7%	2.1%	-3.1%
C/S America	8,500	0.9%	12,700	1.3%	49.4%	41.8%
Other	11,400	1.3%	12,000	1.3%	5.3%	-0.1%
Total	901,200	100.0%	949,600	100.0%		



Packet Pg. 1409 of 1528

JANUARY 2025 | Highlights & Areas of Concern

downs & st. germain RESEARCH

Highlights

- Key performance metrics (visitation, room nights, direct spend, and economic impact) were all up at least slightly compared to January 2024.

- International visitors accounted for 19% of visitation in January, and they have accounted for 15.5% of all visitation so far in FY 2025.

Potential Areas of Concern

- Occupied room nights increased 5.8% year-over-year, which is a positive, but it was slightly outpaced by the year-over-year increase in room supply, causing the overall Occupancy Rate to fall 1.5% compared to January 2024.

- Additionally, the Average Daily Rate (ADR) dropped 2.4% year-over-year, dropping the Revenue Per Available Room (RevPAR) 3.9% year-over-year.
  - This is to be expected with increased competition but is something to keep an eye on going forward.
  - Maintaining steady demand increases should be able to help counteract the impact of a slightly lower ADR.

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST
PARADISECOAST.COM



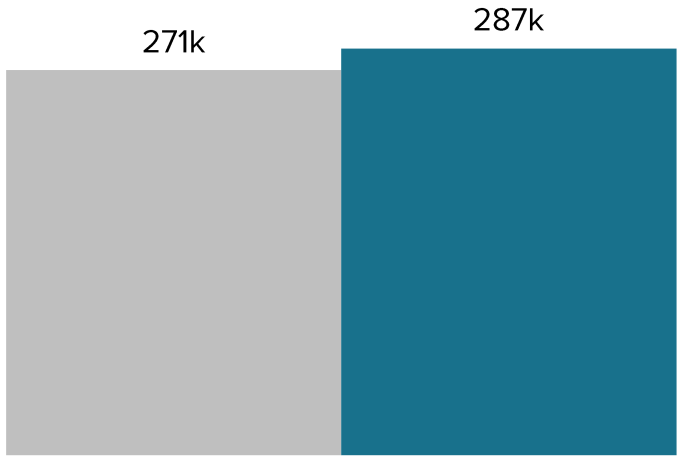
2

EXECUTIVE MONTHLY SUMMARY

JANUARY 2025 | VISITATION & ROOM NIGHTS

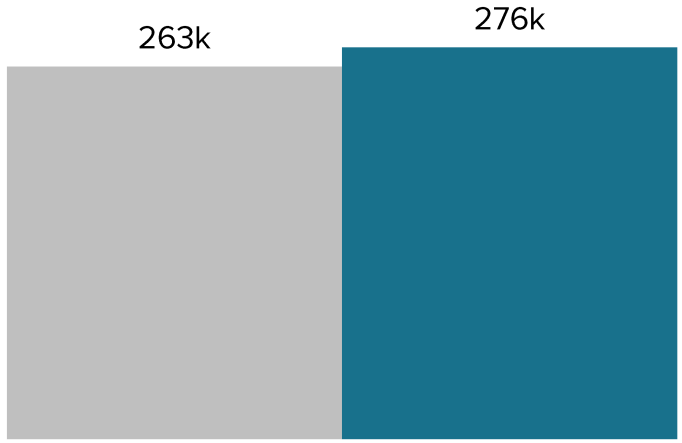
downs & st. germain RESEARCH

VISITORS
286,800



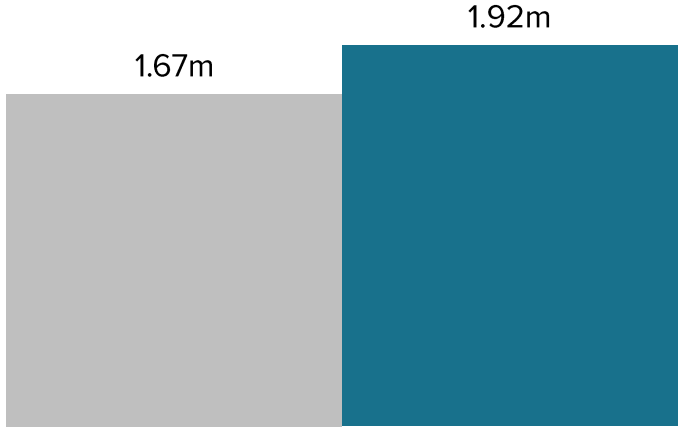
+ **5.7%** from 2024

ROOM NIGHTS
276,100



+ **5.1%** from 2024

VISITOR DAYS
1,915,800



+ **14.6%** from 2024

Jan-24 Jan-25

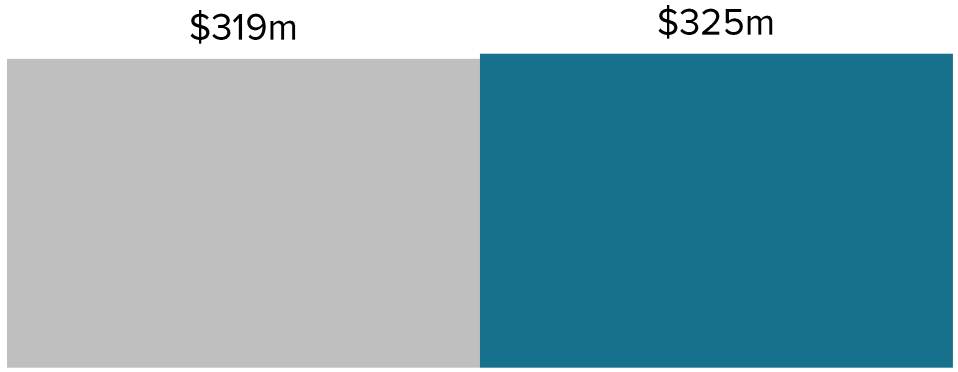
NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST
PARADISECOAST.COM

JANUARY 2025 | SPENDING & ECONOMIC IMPACT[1]

downs & st. germain RESEARCH

DIRECT SPENDING

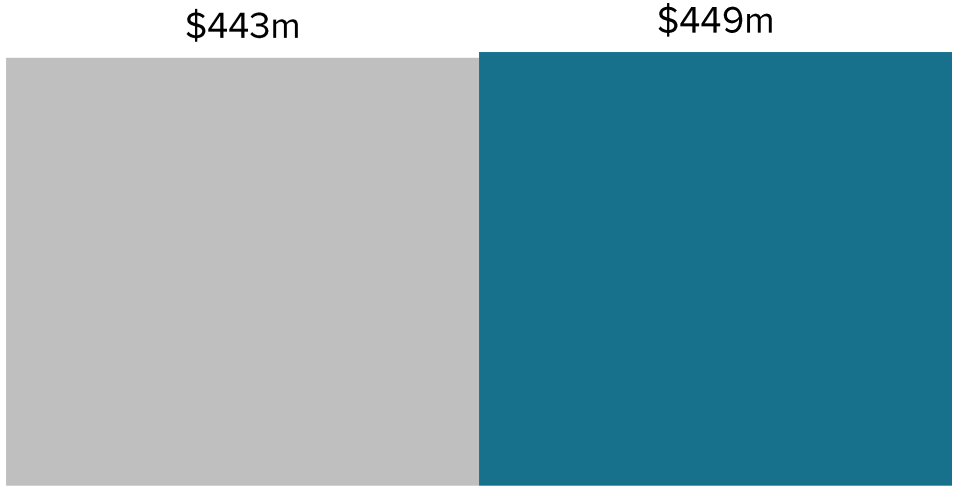
$324,649,100



+ 1.6% from 2024

ECONOMIC IMPACT

$448,665,100



+ 1.3% from 2024

Jan-24 Jan-25

[1]The IMPLAN multiplier for Collier County was 1.386 for 2024 and is 1.382 in 2025.

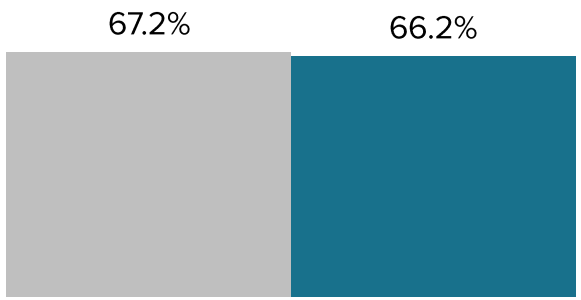
NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

JANUARY 2025 | OVERALL LODGING METRICS[1,2]

downs & st. germain RESEARCH

OCCUPANCY RATE

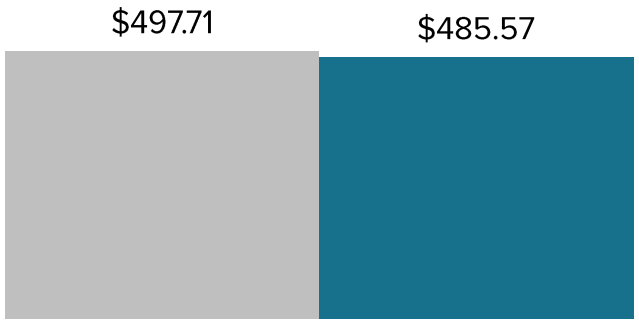
66.2%



- 1.5% from 2024

AVERAGE DAILY RATE

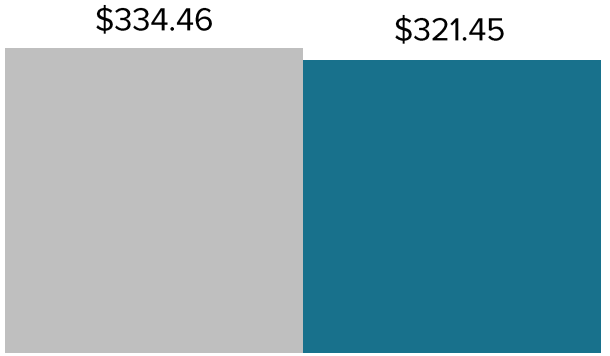
$485.57



- 2.4% from 2024

REVENUE PER AVAILABLE ROOM

$321.45



- 3.9% from 2024

Jan-24 Jan-25

[1] Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.
[2] Overall Lodging Metrics are reflective of paid accommodations as a whole, including both hotels and vacation rentals within Collier County.

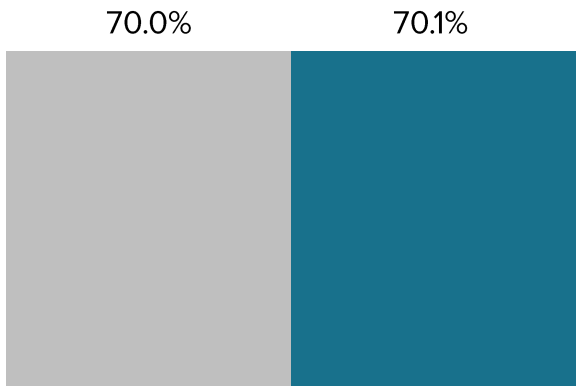
NAPLES · MARCO ISLAND EVERGLADES
PARADISECOAST.COM

JANUARY 2025 | HOTEL LODGING METRICS[1,2]

downs & st. germain RESEARCH

OCCUPANCY RATE

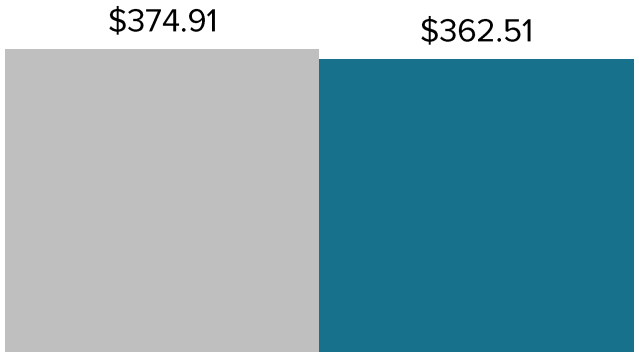
70.1%



+ 0.1% from 2024

AVERAGE DAILY RATE

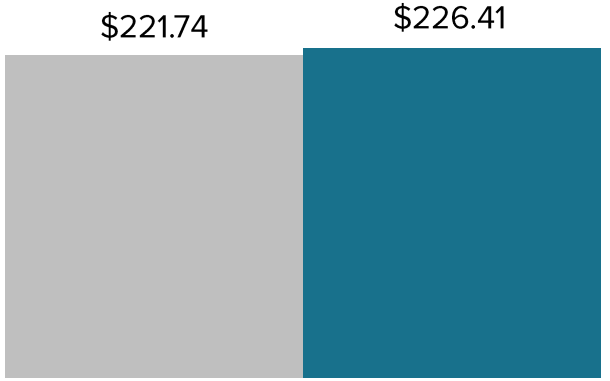
$362.51



- 3.3% from 2024

REVENUE PER AVAILABLE ROOM

$254.06



- 3.2% from 2024

Jan-24 Jan-25

[1]Source: STR data
[2] Lodging metrics on this slide are only reflective of the hotels within Collier County.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

JANUARY 2025 | VISITOR ORIGINS

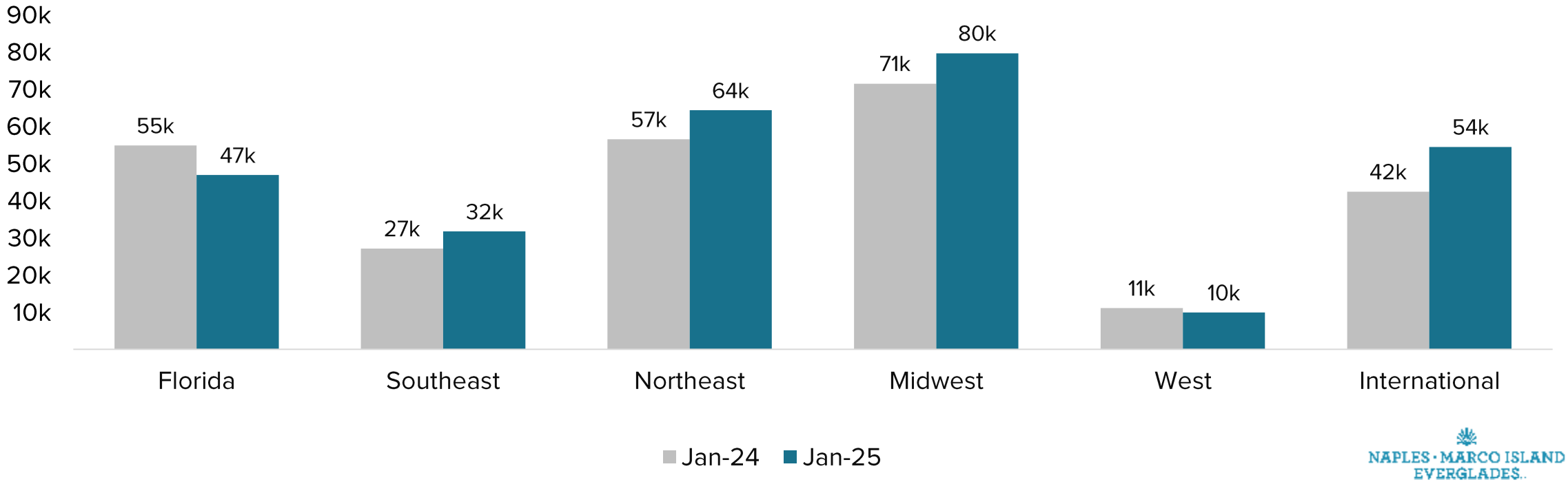
downs & st. germain RESEARCH

FLORIDA VISITORS

46,900

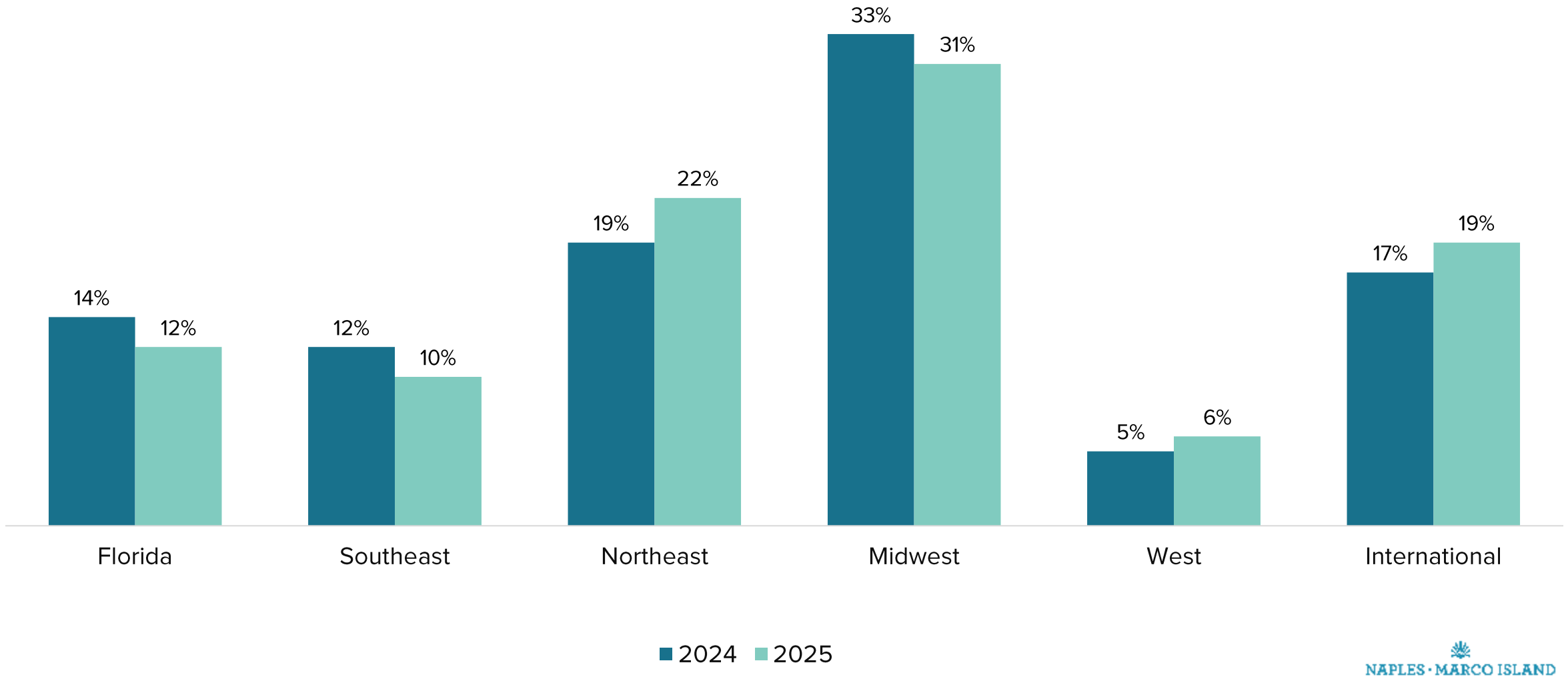
OUT-OF-STATE VISITORS

239,900



NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

JANUARY 2025 | OVERNIGHT VISITOR ORIGINS





3

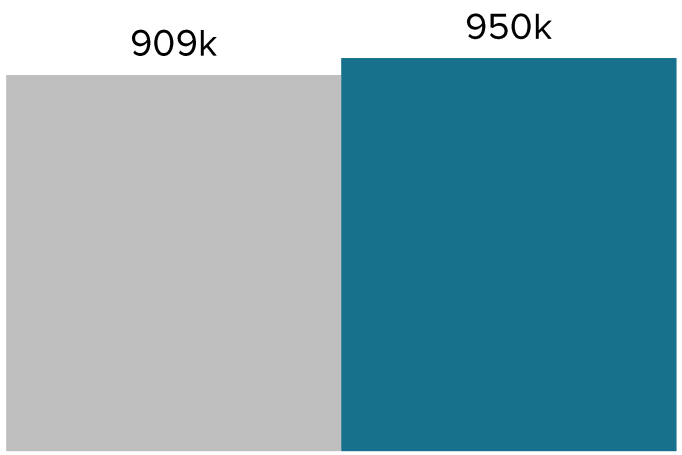
EXECUTIVE FISCAL YEAR-TO-DATE (FYTD) SUMMARY

FYTD 2025 | VISITATION METRICS

downs & st. germain RESEARCH

FYTD VISITORS

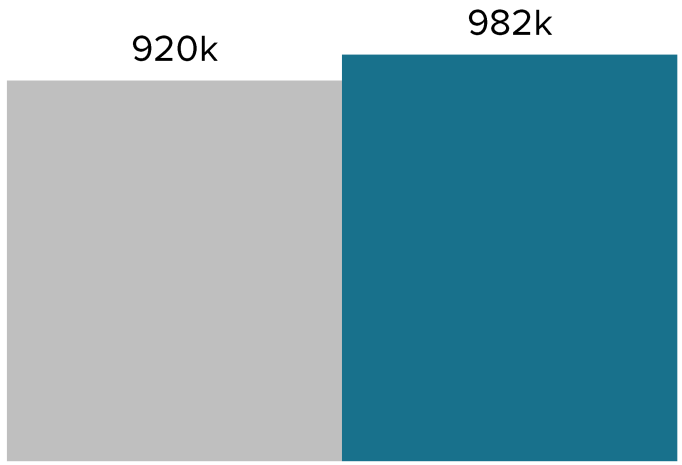
909,300



+ **4.4%** from FYTD 24

FYTD ROOM NIGHTS

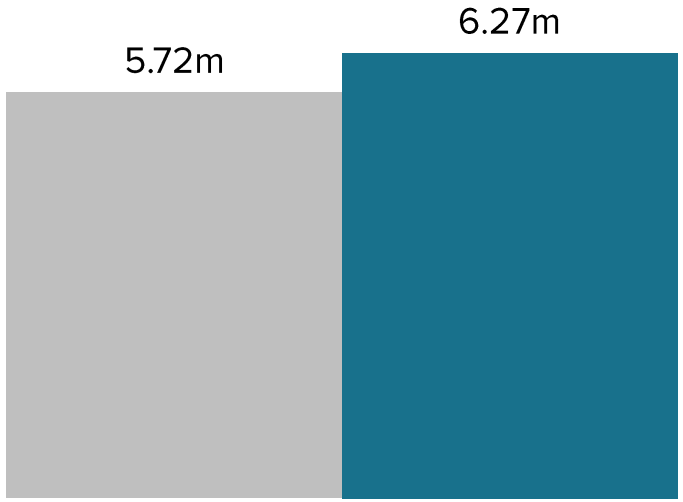
919,900



+ **6.8%** from FYTD 24

FYTD VISITOR DAYS

5,716,800



+ **9.7%** from FYTD 24

FYTD 24 FYTD 25

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST
PARADISECOAST.COM

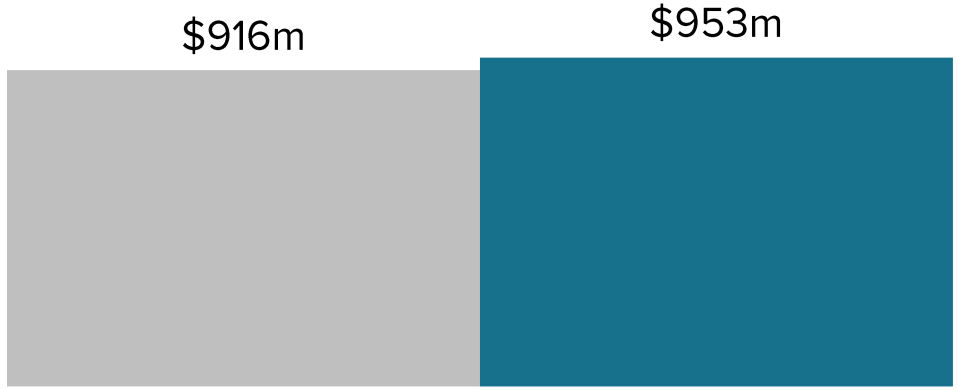
FYTD 2025 | SPENDING & ECONOMIC IMPACT

downs & st. germain RESEARCH

FYTD DIRECT SPENDING

$952,624,700

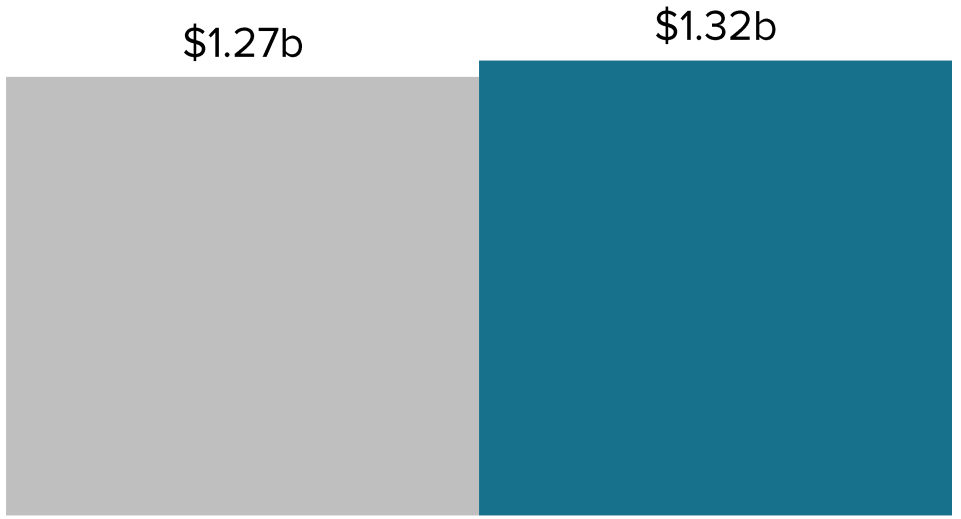
+ **4.0%** from FYTD 24



FYTD ECONOMIC IMPACT

$1,317,037,500

+ **3.7%** from FYTD 24[1]



FYTD 24 FYTD 25

[1]The IMPLAN multiplier for Collier County was 1.386 for 2024 and is 1.382 in 2025.

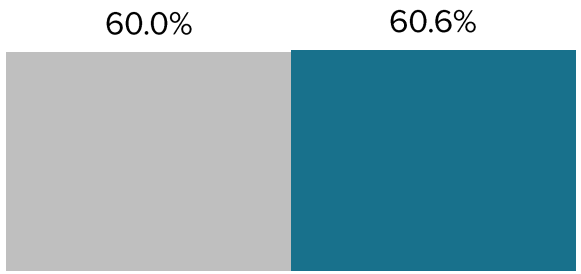
NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

FYTD 2025 | OVERALL LODGING METRICS[1,2]

downs & st. germain RESEARCH

OCCUPANCY RATE

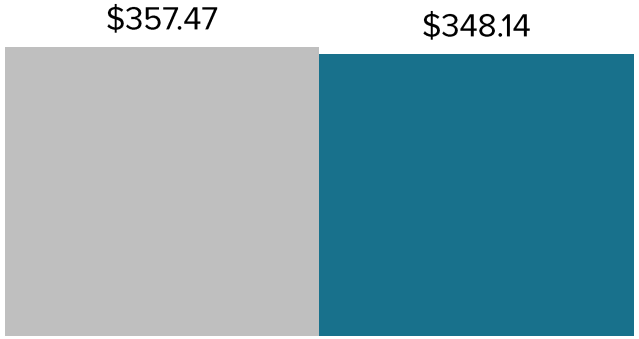
60.6%



+ 1.0% from FYTD 24

AVERAGE DAILY RATE

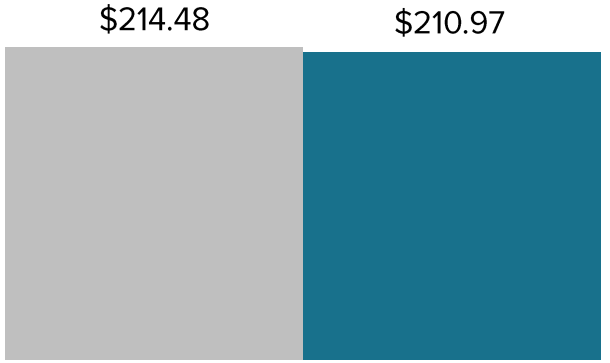
$348.14



- 2.6% from FYTD 24

REVENUE PER AVAILABLE ROOM

$210.97



- 1.6% from FYTD 24

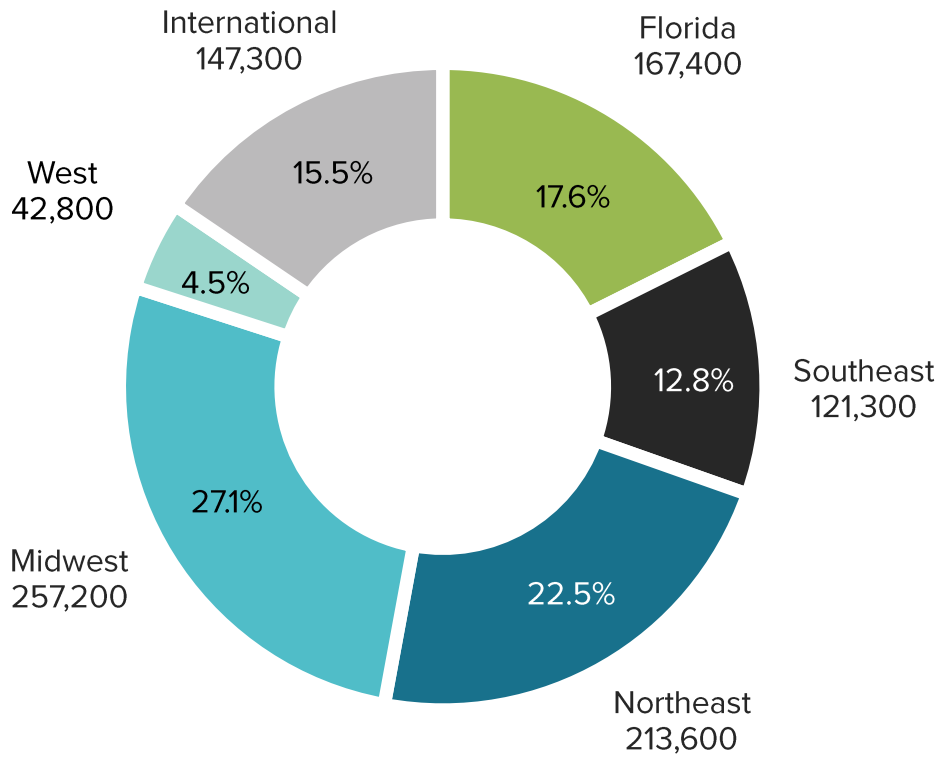
[1] Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.
[2] Overall Lodging Metrics are reflective of paid accommodations as a whole, including both hotels and vacation rentals within Collier County.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

FYTD 2025 | VISITOR ORIGIN

downs & st. germain RESEARCH

	FYTD 2024		FYTD 2025		Percent Change (±Δ%)	
Region	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Florida	169,900	18.8%	167,400	17.6%	-1.5%	-6.5%
Southeast	117,000	13.0%	121,300	12.8%	3.7%	-1.6%
Northeast	200,700	22.3%	213,600	22.5%	6.4%	1.0%
Midwest	237,600	26.4%	257,200	27.1%	8.2%	2.7%
West	47,900	5.3%	42,800	4.5%	-10.6%	-15.2%
Canada	46,000	5.1%	59,100	6.2%	28.5%	21.9%
Europe	62,200	6.9%	63,500	6.7%	2.1%	-3.1%
C/S America	8,500	0.9%	12,700	1.3%	49.4%	41.8%
Other	11,400	1.3%	12,000	1.3%	5.3%	-0.1%
Total	901,200	100.0%	949,600	100.0%		



NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM



4a

MONTHLY DESTINATION COMPARISONS

DESTINATION COMPARISONS | SUPPLY

downs & st. germain RESEARCH

	Hotel Supply (Rooms)	Δ% in Supply from January 2024
	Total	Total
Miami	2,027,958	- 0.2%
Ft. Lauderdale	1,220,098	+ 0.4%
Palm Beach	605,089	+ 1.4%
Sarasota	386,322	+ 0.9%
Ft. Myers	379,037	+ 6.6%
Florida Keys	330,460	+ 1.6%
St. Petersburg	319,858	- 10.4%
Clearwater	277,605	- 1.1%
Naples	263,872	+ 14.8%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST
PARADISECOAST.COM

DESTINATION COMPARISONS | DEMAND

downs & st. germain RESEARCH

	Hotel Demand (Rooms)				Δ% in Demand from January 2024			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
Miami	1,186,628	311,527	104,930	1,603,084	- 1.4%	+ 2.6%	+ 16.6%	+ 0.4%
Ft. Lauderdale	697,132	187,482	27,080	911,694	+ 0.9%	- 5.4%	- 19.2%	- 1.2%
Palm Beach	331,214	121,809	9,327	462,350	+ 3.9%	+ 39.1%	- 14.9%	+ 10.8%
Sarasota	207,899	69,712	9,211	286,823	+ 10.4%	+ 0.5%	+ 34.9%	+ 8.4%
Ft. Myers	181,385	55,804	19,326	256,515	+ 3.7%	- 2.5%	- 8.0%	+ 1.4%
St. Petersburg	178,020	71,889	5,868	255,777	+ 15.2%	+ 7.3%	+ 124.6%	+ 14.1%
Florida Keys	213,187	41,084	1,062	255,333	+ 1.8%	- 8.9%	+ 16.8%	-
Clearwater	141,160	75,641	0	216,801	+ 22.3%	+ 12.2%	-	+ 18.6%
Naples	117,165	67,767	0	184,932	+ 19.6%	+ 7.8%	- 100.0%	+ 14.9%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

DESTINATION COMPARISONS | OCCUPANCY

downs & st. germain RESEARCH

	Hotel Occupancy (%)				Δ% in Occupancy from January 2024			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
St. Petersburg	55.7%	22.5%	1.8%	80.0%	+ 28.6%	+ 19.8%	+ 150.7%	+ 27.4%
Miami	58.5%	15.4%	5.2%	79.0%	- 1.2%	+ 2.8%	+ 16.8%	+ 0.6%
Clearwater	50.8%	27.2%	0.0%	78.1%	+ 23.6%	+ 13.4%	-	+ 19.9%
Florida Keys	64.5%	12.4%	0.3%	77.3%	+ 0.2%	- 10.3%	+ 15.0%	- 1.6%
Palm Beach	54.7%	20.1%	1.5%	76.4%	+ 2.5%	+ 37.2%	- 16.0%	+ 9.3%
Ft. Lauderdale	57.1%	15.4%	2.2%	74.7%	+ 0.5%	- 5.8%	- 19.5%	- 1.6%
Sarasota	53.8%	18.0%	2.4%	74.2%	+ 9.4%	- 0.3%	+ 33.7%	+ 7.5%
Naples	44.4%	25.7%	0.0%	70.1%	+ 4.2%	- 6.1%	- 100.0%	+ 0.1%
Ft. Myers	47.9%	14.7%	5.1%	67.7%	- 2.7%	- 8.6%	- 13.7%	- 4.9%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

DESTINATION COMPARISONS | REVENUE

downs & st. germain RESEARCH

	Hotel Revenue (Millions of Dollars)				Δ% in Revenue from January 2024			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
Miami	$309.16	$88.42	$15.08	$412.66	+ 1.4%	+ 3.9%	+ 27.3%	+ 2.7%
Ft. Lauderdale	$139.74	$48.38	$4.57	$192.69	+ 1.0%	- 3.0%	- 18.4%	- 0.6%
Palm Beach	$103.71	$39.44	$1.47	$144.62	+ 12.4%	+ 41.5%	- 14.0%	+ 18.7%
Florida Keys	$81.48	$15.47	$0.83	$97.78	- 0.7%	- 7.5%	+ 41.2%	- 1.6%
Naples	$42.48	$24.56	$0.00	$67.04	+ 9.2%	+ 14.9%	- 100.0%	+ 11.1%
Sarasota	$44.07	$15.45	$1.63	$61.16	+ 14.4%	+ 18.4%	+ 57.9%	+ 16.2%
Ft. Myers	$32.81	$11.70	$3.70	$48.20	+ 0.9%	- 2.6%	- 0.6%	- 0.1%
St. Petersburg	$32.57	$13.60	$0.77	$46.95	+ 20.4%	+ 13.9%	+ 206.9%	+ 19.6%
Clearwater	$25.32	$15.58	$0.00	$40.90	+ 27.0%	+ 20.2%	-	+ 24.4%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

DESTINATION COMPARISONS | DAILY RATE

downs & st. germain RESEARCH

	Hotel Average Daily Rate ($)				Δ% in ADR from January 2024			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
Florida Keys	$382.20	$376.63	$777.72	$382.95	- 2.5%	+ 1.5%	+ 20.9%	- 1.6%
Naples	$362.58	$362.40	$0.00	$362.51	- 8.8%	+ 6.6%	- 100.0%	- 3.3%
Palm Beach	$313.13	$323.79	$157.49	$312.80	+ 8.2%	+ 1.7%	+ 1.0%	+ 7.2%
Miami	$260.54	$283.83	$143.70	$257.41	+ 2.8%	+ 1.3%	+ 9.2%	+ 2.3%
Sarasota	$211.99	$221.67	$177.35	$213.23	+ 3.6%	+ 17.7%	+ 17.1%	+ 7.2%
Ft. Lauderdale	$200.45	$258.05	$168.82	$211.36	+ 0.1%	+ 2.6%	+ 1.0%	+ 0.6%
Clearwater	$179.38	$205.91	$0.00	$188.64	+ 3.9%	+ 7.1%	-	+ 4.9%
Ft. Myers	$180.87	$209.61	$191.23	$187.90	- 2.7%	- 0.1%	+ 8.0%	- 1.4%
St. Petersburg	$182.98	$189.25	$131.65	$183.56	+ 4.5%	+ 6.1%	+ 36.6%	+ 4.8%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
PARADISECOAST.COM

DESTINATION COMPARISONS | REVPAR

downs & st. germain RESEARCH

	Hotel Revenue Per Available Room ($)				Δ% in RevPAR from January 2024			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
Florida Keys	$246.56	$46.82	$2.50	$295.89	- 2.3%	- 8.9%	+ 39.0%	- 3.1%
Naples	$160.99	$93.07	$0.00	$254.06	- 4.9%	+ 0.1%	- 100.0%	- 3.2%
Palm Beach	$171.40	$65.18	$2.43	$239.01	+ 10.9%	+ 39.6%	- 15.2%	+ 17.1%
Miami	$152.45	$43.60	$7.44	$203.48	+ 1.6%	+ 4.2%	+ 27.6%	+ 2.9%
Sarasota	$114.09	$40.00	$4.23	$158.31	+ 13.4%	+ 17.3%	+ 56.6%	+ 15.2%
Ft. Lauderdale	$114.53	$39.65	$3.75	$157.93	+ 0.6%	- 3.4%	- 18.7%	- 1.0%
Clearwater	$91.21	$56.11	$0.00	$147.32	+ 28.4%	+ 21.6%	-	+ 25.7%
St. Petersburg	$101.84	$42.53	$2.42	$146.79	+ 34.4%	+ 27.1%	+ 242.6%	+ 33.5%
Ft. Myers	$86.55	$30.86	$9.75	$127.16	- 5.4%	- 8.7%	- 6.8%	- 6.3%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM



4b

FISCAL YTD DESTINATION COMPARISONS

DESTINATION COMPARISONS | SUPPLY

downs & st. germain RESEARCH

	Hotel Supply (Rooms)	%Δ in Supply from FYTD 2024
	Total	Total
Miami	7,999,580	- 0.2%
Ft. Lauderdale	4,804,745	+ 0.1%
Palm Beach	2,375,372	+ 0.6%
Sarasota	1,519,118	- 0.4%
Ft. Myers	1,457,854	+ 4.9%
Florida Keys	1,310,720	+ 0.9%
St. Petersburg	1,272,227	- 9.5%
Clearwater	1,100,838	- 2.1%
Naples	1,028,646	+ 14.4%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST
PARADISECOAST.COM

DESTINATION COMPARISONS | DEMAND

downs & st. germain RESEARCH

	Hotel Demand (Rooms)				%Δ in Demand from FYTD 2024			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
Miami	4,607,881	967,904	362,175	5,937,960	- 0.3%	+ 3.6%	+ 8.6%	+ 0.9%
Ft. Lauderdale	2,773,902	591,860	95,845	3,461,606	+ 1.3%	- 1.8%	- 26.1%	- 0.2%
Palm Beach	1,285,551	406,535	33,057	1,725,143	+ 5.2%	+ 27.2%	- 10.0%	+ 9.3%
Sarasota	852,369	235,768	33,836	1,121,973	+ 13.3%	+ 24.1%	- 2.7%	+ 14.8%
St. Petersburg	698,738	252,804	23,709	975,251	+ 11.7%	+ 19.0%	+ 150.7%	+ 15.1%
Ft. Myers	705,883	185,152	70,554	961,589	+ 5.5%	+ 3.4%	- 5.2%	+ 4.2%
Florida Keys	770,395	118,708	7,207	896,310	- 3.0%	- 9.3%	+ 205.7%	- 3.3%
Clearwater	576,537	252,049	186	828,772	+ 11.7%	+ 36.3%	- 1.8%	+ 18.2%
Naples	454,960	206,209	0	661,168	+ 17.6%	+ 5.9%	- 100.0%	+ 13.5%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

DESTINATION COMPARISONS | OCCUPANCY

downs & st. germain RESEARCH

	Hotel Occupancy (%)				%Δ in Occupancy from FYTD 2024			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
St. Petersburg	54.9%	19.9%	1.9%	76.7%	+ 23.5%	+ 31.5%	+ 177.1%	+ 27.2%
Clearwater	52.4%	22.9%	0.0%	75.3%	+ 14.1%	+ 39.2%	+ 0.3%	+ 20.7%
Miami	57.6%	12.1%	4.5%	74.2%	- 0.1%	+ 3.8%	+ 8.8%	+ 1.0%
Sarasota	56.1%	15.5%	2.2%	73.9%	+ 13.7%	+ 24.6%	- 2.4%	+ 15.3%
Palm Beach	54.1%	17.1%	1.4%	72.6%	+ 4.6%	+ 26.4%	- 10.5%	+ 8.7%
Ft. Lauderdale	57.7%	12.3%	2.0%	72.0%	+ 1.2%	- 1.9%	- 26.1%	- 0.3%
Florida Keys	58.8%	9.1%	0.5%	68.4%	- 3.9%	- 10.2%	+ 202.9%	- 4.2%
Ft. Myers	48.4%	12.7%	4.8%	66.0%	+ 0.5%	- 1.5%	- 9.6%	- 0.7%
Naples	44.2%	20.0%	0.0%	64.3%	+ 2.8%	- 7.4%	- 100.0%	- 0.8%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

DESTINATION COMPARISONS | REVENUE

downs & st. germain RESEARCH

	Hotel Revenue (Millions of Dollars)				%Δ in Revenue from FYTD 2024			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
Miami	$1,099.14	$252.63	$47.76	$1,399.53	+ 2.5%	+ 9.2%	+ 19.3%	+ 4.2%
Ft. Lauderdale	$502.78	$128.00	$13.82	$644.59	+ 2.5%	- 0.8%	- 18.9%	+ 1.3%
Palm Beach	$339.39	$107.15	$4.08	$450.61	+ 10.9%	+ 21.7%	+ 0.8%	+ 13.2%
Florida Keys	$270.07	$40.41	$4.59	$315.07	- 4.5%	- 9.9%	+ 332.2%	- 4.1%
Sarasota	$162.14	$47.83	$5.14	$215.11	+ 17.7%	+ 39.0%	+ 28.0%	+ 22.1%
Naples	$145.28	$59.53	$0.00	$204.81	+ 11.8%	+ 11.3%	- 100.0%	+ 11.5%
St. Petersburg	$121.20	$42.88	$2.80	$166.88	+ 14.4%	+ 24.6%	+ 249.8%	+ 18.3%
Ft. Myers	$108.53	$31.24	$10.14	$149.91	+ 3.3%	- 2.6%	+ 0.7%	+ 1.8%
Clearwater	$99.82	$48.02	$0.00	$147.84	+ 13.5%	+ 46.4%	- 11.7%	+ 22.4%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

DESTINATION COMPARISONS | DAILY RATE

downs & st. germain RESEARCH

	Hotel Average Daily Rate ($)				%Δ in ADR from FYTD 2024			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
Florida Keys	$350.56	$340.43	$636.28	$351.52	- 1.6%	- 0.6%	+ 41.4%	- 0.8%
Naples	$319.32	$288.68	$0.00	$309.77	- 4.9%	+ 5.1%	- 100.0%	- 1.7%
Palm Beach	$264.00	$263.56	$123.37	$261.20	+ 5.4%	- 4.3%	+ 12.0%	+ 3.5%
Miami	$238.53	$261.01	$131.88	$235.69	+ 2.8%	+ 5.4%	+ 9.9%	+ 3.3%
Sarasota	$190.23	$202.85	$152.03	$191.73	+ 3.8%	+ 12.0%	+ 31.5%	+ 6.3%
Ft. Lauderdale	$181.25	$216.26	$144.15	$186.21	+ 1.2%	+ 1.0%	+ 9.7%	+ 1.5%
Clearwater	$173.14	$190.50	$6.69	$178.38	+ 1.6%	+ 7.4%	- 10.1%	+ 3.6%
St. Petersburg	$173.45	$169.63	$118.04	$171.11	+ 2.4%	+ 4.8%	+ 39.6%	+ 2.8%
Ft. Myers	$153.74	$168.72	$143.78	$155.90	- 2.0%	- 5.8%	+ 6.2%	- 2.3%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST
PARADISECOAST.COM

DESTINATION COMPARISONS | REVPAR

downs & st. germain RESEARCH

	Hotel Revenue Per Available Room ($)				%Δ in RevPAR from FYTD 2024			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
Florida Keys	$206.05	$30.83	$3.50	$240.38	- 5.4%	- 10.7%	+ 328.3%	- 5.0%
Naples	$141.23	$57.87	$0.00	$199.10	- 2.3%	- 2.8%	- 100.0%	- 2.5%
Palm Beach	$142.88	$45.11	$1.72	$189.70	+ 10.2%	+ 21.0%	+ 0.2%	+ 12.5%
Miami	$137.40	$31.58	$5.97	$174.95	+ 2.7%	+ 9.4%	+ 19.5%	+ 4.3%
Sarasota	$106.73	$31.48	$3.39	$141.60	+ 18.1%	+ 39.5%	+ 28.4%	+ 22.5%
Clearwater	$90.68	$43.62	$0.00	$134.30	+ 15.9%	+ 49.5%	- 9.8%	+ 25.0%
Ft. Lauderdale	$104.64	$26.64	$2.88	$134.16	+ 2.4%	- 0.9%	- 18.9%	+ 1.2%
St. Petersburg	$95.26	$33.71	$2.20	$131.17	+ 26.5%	+ 37.8%	+ 286.7%	+ 30.7%
Ft. Myers	$74.44	$21.43	$6.96	$102.83	- 1.5%	- 7.2%	- 4.0%	- 2.9%

[1] Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM



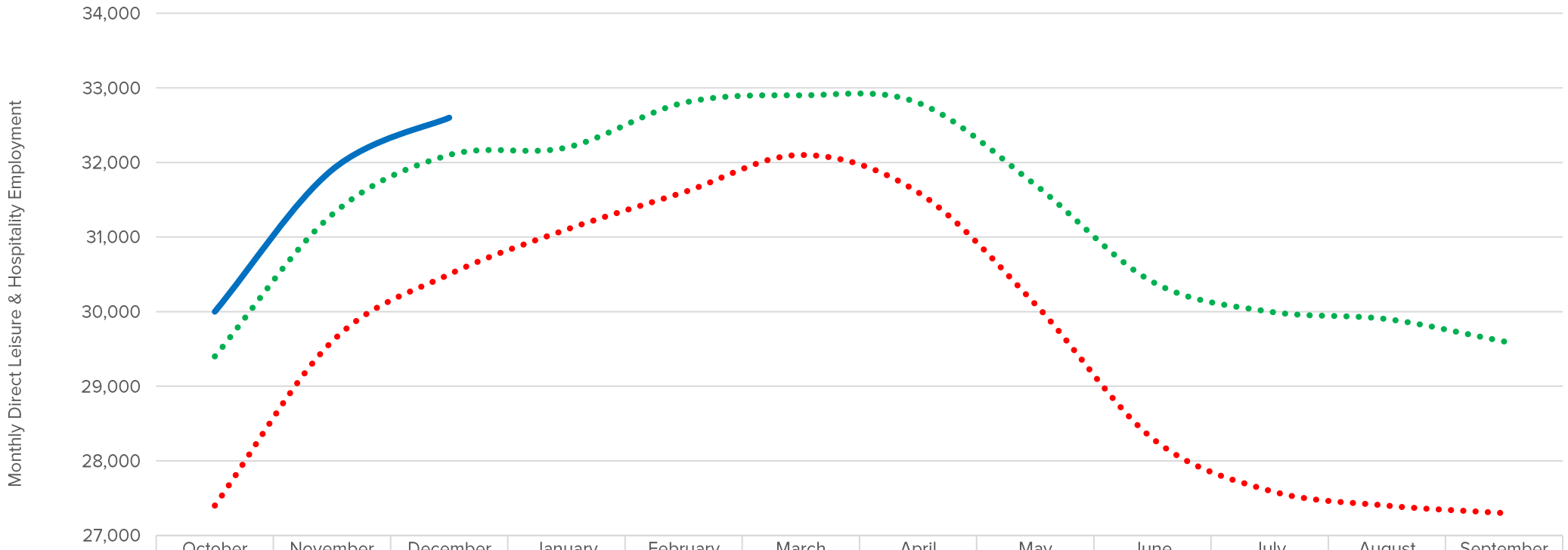
5

INDUSTRY DATA

INDUSTRY DATA | CURRENT EMPLOYMENT

downs & st. germain RESEARCH

Collier County Direct Leisure and Hospitality Employment[1]



	October	November	December	January	February	March	April	May	June	July	August	September
FY23	27,400	29,600	30,500	31,100	31,600	32,100	31,600	30,100	28,300	27,600	27,400	27,300
FY24	29,400	31,300	32,100	32,200	32,800	32,900	32,800	31,700	30,400	30,000	29,900	29,600
FY25	30,000	31,900	32,600 (P)									

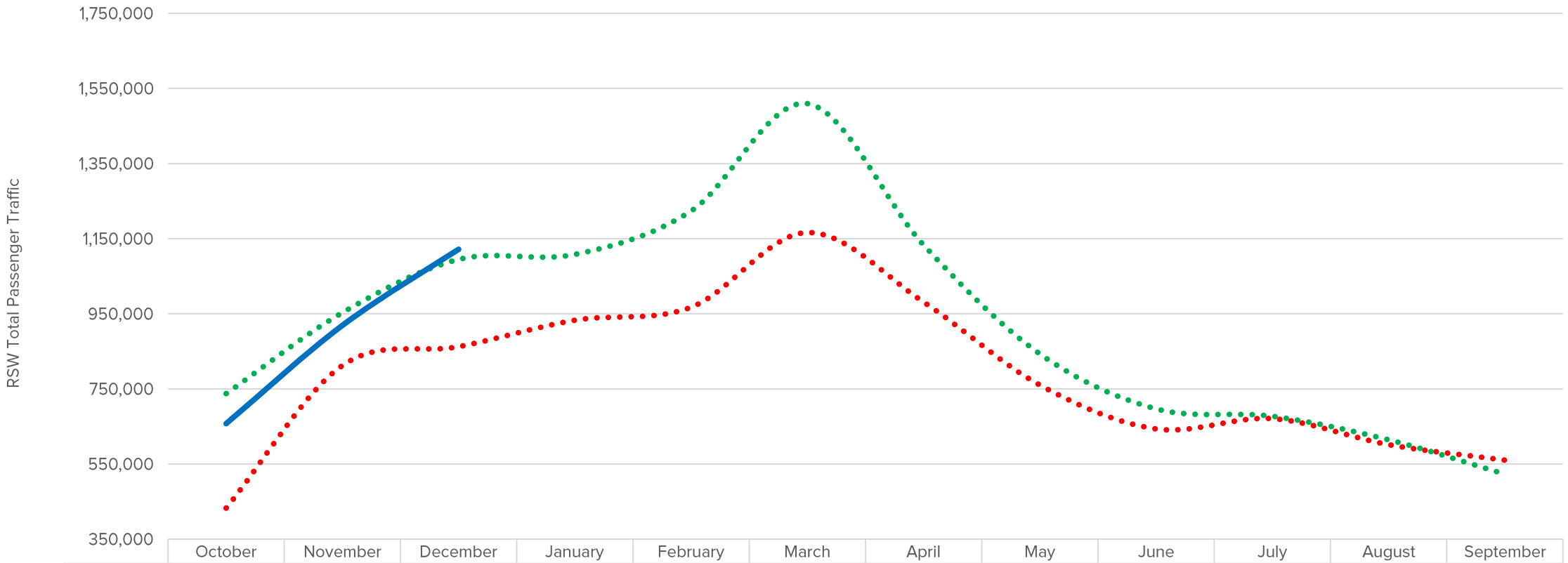
[1]SOURCE: Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector, not seasonally adjusted.
(P) Preliminary.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

INDUSTRY DATA | RSW TOTAL PASSENGER TRAFFIC

downs & st. germain RESEARCH

Southwest Florida International Airport (RSW) Total Passenger Traffic[1]



	October	November	December	January	February	March	April	May	June	July	August	September
FY23	432,667	812,305	862,368	932,896	967,416	1,166,442	981,216	760,330	643,486	670,818	601,542	560,358
FY24	737,527	953,025	1,094,783	1,108,190	1,223,761	1,509,777	1,133,256	843,270	696,867	677,137	614,531	523,004
FY25	657,488	919,108	1,121,793									

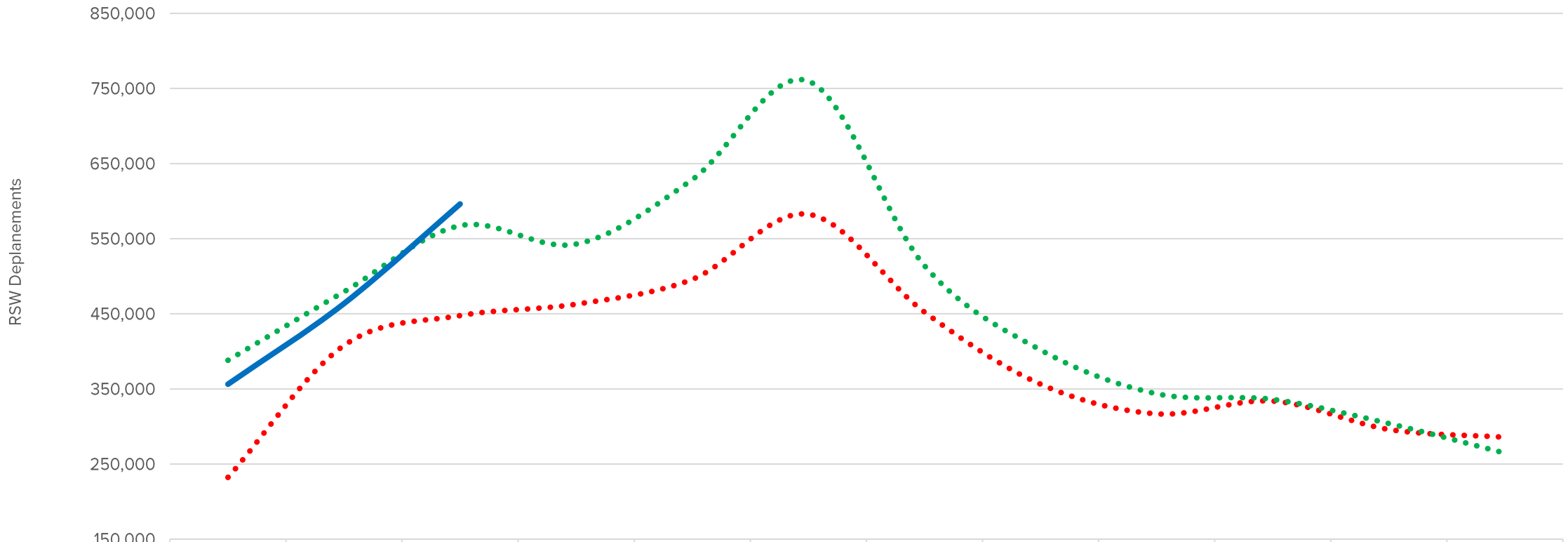
[1]SOURCE: Lee County Port Authority Monthly Statistics.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

INDUSTRY DATA | RSW INFLOW (DEPLANEMENTS)

downs & st. germain RESEARCH

Southwest Florida International Airport (RSW) Deplanements[1]



	October	November	December	January	February	March	April	May	June	July	August	September
FY23	232,239	407,927	447,666	462,851	495,943	582,580	452,356	356,361	316,887	333,862	296,092	285,679
FY24	388,153	479,404	567,439	542,929	628,786	759,836	514,166	401,868	343,614	336,069	303,982	264,625
FY25	356,316	463,688	596,290									

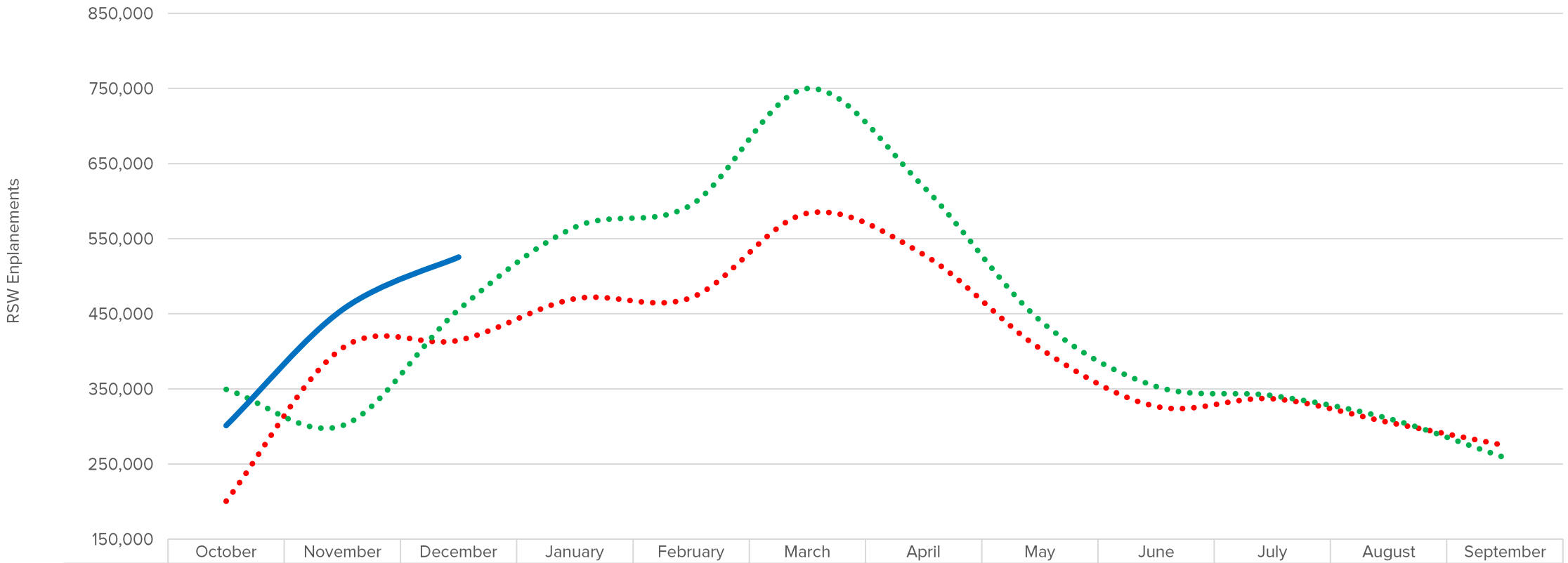
[1]SOURCE: Lee County Port Authority Monthly Statistics.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

INDUSTRY DATA | RSW OUTFLOW (ENPLANEMENTS)

downs & st. germain RESEARCH

Southwest Florida International Airport (RSW) Enplanements[1]



	October	November	December	January	February	March	April	May	June	July	August	September
FY23	200,428	404,378	414,702	470,045	471,473	583,862	528,860	403,969	326,599	336,956	305,450	274,679
FY24	349,374	301,172	455,420	565,261	594,975	749,941	619,090	441,402	353,253	341,068	310,549	258,379
FY25	301,172	455,420	525,503									

[1]SOURCE: Lee County Port Authority Monthly Statistics.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

INDUSTRY DATA | LICENSED RENTAL UNITS

downs & st. germain RESEARCH

Licensed Transient Rental Units as of February 1st, 2024[1]				
	Hotel	Motel	Vacation Rental	Total
Naples	5,315	1,368	2,513	**9,196**
Marco Island	1,299	97	1,878	**3,274**
Immokalee	0	70	98	**168**
Golden Gate	0	116	0	**116**
Everglades City	38	36	20	**94**
Chokoloskee	0	13	1	**14**
Goodland	0	5	8	**13**
Ave Maria	0	0	6	**6**
Ochopee	0	0	1	**1**
Total	**6,652**	**1,705**	**4,525**	**12,882**

[1] SOURCE: Florida Department of Business & Professional Regulation.

NAPLES · MARCO ISLAND EVERGLADES
FLOR DAYS PARADISE COAST
PARADISECOAST.COM

Questions?

Contact Info:

Naples, Marco Island, Everglades CVB

Jay Tusa, Executive Tourism Director
jay.tusa@colliercountyfl.gov

Sandra Rios, Public Relations & Communications Manager
sandra.rios@colliercountyfl.gov

John Melleky, Arts & Culture Manager
john.melleky@colliercountyfl.gov

Downs & St. Germain Research
(850) 906-3111 | contact@dsg-research.com

Joseph St. Germain, President
joseph@dsg-research.com

James Brendle, Project Director
james@dsg-research.com




THANK YOU



NAPLES · MARCO ISLAND EVERGLADES℠

FLORIDA'S PARADISE COAST

Monthly Report | January 2025

Paradise | a partner for good

Table of Contents

1	Zartico Visitor Insights
2	Organic Social Media
3	Email
4	Campaigns
5	Digital Media Insights



1

Zartico
Visitor Insights

Zartico: Visitor Insights | January 2025

Out-Of-State In-State Visitors

Out-of-state visitors made up 57.6% of visits and 90.1% of overall spend in January 2025.

In-state visitors made up 42.4% of visits and 9.9% of overall spend.

Out of State visitation outperformed in-state stats for visitor spending significantly.

Overnight Vs. Day Visitation

Day visitors
(68.5%)

Overnight visitors
(31.3%)

Top DMA Spending Market

Chicago,IL DMA continues to rank #1 in top spending market

Followed by:
Minneapolis
Boston
New York
Philadelphia
Miami/FT Lauderdale

Chicago visitors spent more on accommodations and dining.

Top Overnight Markets

Miami-Ft Lauderdale overnight visitors continues to rank #1 in top visitation for the month of January

Followed by:
Tampa-St Petersburg, FL and New York.

Top 2 Out-Of-State:
New York, NY and Chicago, IL DMAs

Destination Visitation

In-state top visited place in January:
Naples Beach

Out-of-State top visited place in January.
Naples Beach

Zartico: Visitor Insights | January 2025

75%

January Hotel Occupancy

+7%

Hotel occupancy change from December



+3%

Hotel Occupancy Change from Same Month Last Year



ZARTICO

*Approximate total, all final Nov invoices not received yet



2

Organic Social Media

Social Media (Organic) - Summary

- Implemented annual content strategy across all social media platforms.
- Conducted day-to-day operations, including but not limited to content creation, LIVE streams, content curation, and reporting/analysis, etc.
- Completed the February 2025 content calendars to be shared across social media platforms.
- Established Facebook LIVE and Instagram Story topics for Client to implement in February 2025.
- Supported Client in community management, social listening, optimization, and reporting/analysis, etc.
- Increased timely event coverage resulting in more live story shares, recap videos and an asset library which will be used for future event promotions.
- For future months, the team will be looking to reintroduce a more consistent LIVE stream schedule, include more engagement-boosting tactics such as video voice overs and algorithm favoring tacts like adding music with static Instagram posts.



Organic Social | Facebook

60,707 Followers	+2,597 Net Growth ↑
7,900 Engagement	118.7% Increase ↑
7,367,887 Impressions	89.9% Increase ↑

Summary:

This month, we saw a notable uptick in engagements, impressions, and follower growth, driven by a consistent stream of organic content on Facebook, real-time live-event story updates, and a stronger emphasis on video content—including the return of Live Streams.

Our top-performing posts included a **Cars on 5th** promotion video, a dynamic carousel featuring the **JW Marriott Fire Dancer**, and a collaboration with **FC Naples** unveiling their new jerseys.

In the coming months, we will continue to conduct and implement live streams, seeking opportunities for dynamic captures. Additionally, we will test our content mix and collaborate closely with partners for future opportunities.

Organic Social | Instagram

22,510 Followers	+162 Net Growth ↑
2,658 Engagements	54.4% Increase ↑
776,973 Impressions	254.5% Increase ↑
29,053 Video Views	1.1% Increase ↑

Summary:

In January, we experienced growth across all key metrics, driven by a more consistent posting schedule, an increased focus on video content, the reintroduction of Live Streams, and expanded real-time event story coverage.

A strong emphasis on capturing timely content led to a rise in Reel posts, contributing to higher video views and engagement. Additionally, collaboration posts with partners continue to show success.

Our top-performing posts included an **Instagram Reel** featuring the **Cars on 5th Promotion**, a **timely capture Instagram Reel of Waterside Shops**, and a **carousel collaboration post with FC Naples** unveiling their new jersey.

Media | Organic Social

Year-To-Date			
Instagram	**1,157,137** Total Impressions	**6,919** Post Engagements	**22,510** Total Followers
Facebook	**13,063,868** Total Impressions	**26,666** Post Engagements	**60,707** Total Followers



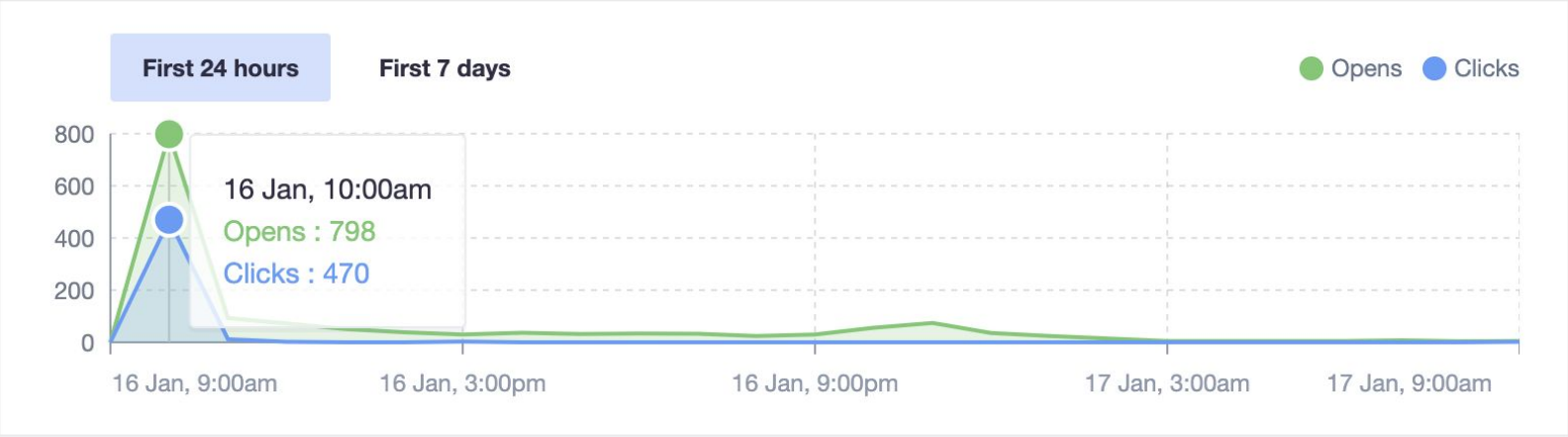
3
Email

Email | Meetings E-Scapes

Subject Line: Looking Ahead to 2025 on Florida's Paradise Coast

Most-Clicked Link: 21st Annual Festival of Birds at Rookery

Recipients	Open Rate	CTO Rate
4,492 Owned	25.1% Owned	0.9% Owned





4

Campaigns

Media | Performance

January's seven campaigns: **Sustaining, Disaster Recovery, UK, Germany, Winter, Weddings and Arts & Culture**

$85,207.21
Total Estimated Digital Spend

20,574,843
Total Impressions

23,276
Total Clicks to Site

137,223
Total Video Views

0.17%
CTR

83%
VCR

Media | Performance

January's seven campaigns: **Sustaining, Disaster Recovery, UK, Germany, Winter, Weddings and Arts & Culture**

Top performing media partners for January:

- **From the Sustaining Campaign, was Expedia, with a 0.73% CTR and Adara who delivered a VCR of 64%.**
- **From the Disaster Recovery Campaign, was Adara and AiOpti with a CTR of 0.16% and AiOpti delivered a VCR of 93%**
- **The International Campaign, Expedia delivered a 0.20% CTR for UK, and 2.48% CTR for Germany (Both campaigns started mid-December)**
- **On the Winter Campaign , the top performing media partner was WiConnect with a 28.69% CTR**
- **For Weddings, Engagement Marketing topped performing with a 5.51% CPR**
- **And for Arts & Culture, DigDev Direct delivered a top CTR of 1.33%**

Industry Benchmark:
CTR: 0.08%
VCR: 70%

Media | Paid Search

January had four campaigns: **Sustaining, Sustaining Spanish, Disaster Recovery, and Weddings.**

393,949	23,873	6.06%	$0.97
Total Impressions	Total Clicks to Site	CTR	CTR

Top Performing Campaign:
Disaster Recovery with an average CTR of **6.40%**

Top Performing Ad:
Sustaining Spanish - Things to do

Industry Benchmark:
CTR: 4%
CPC: $1.35

Media | Paid Search Breakdown

Ad Group	Impressions	Clicks	CTR	CTR Industry Benchmark	Avg. CPC	CPC Industry Benchmark
Weddings	8,026	456	5.68%	*4%*	$1.37	*$1.35*
Sustaining	92,542	4,853	5.24%	*4%*	$0.87	*$1.35*
Sustaining Spanish	16,451	836	5.08%	*4%*	$1.06	*$1.35*
Disaster Recovery	276,930	17,728	6.40%	*4%*	$0.99	*$1.35*

Media | Paid Social

Meta: January

7,017,408	181,898	60,737
Total Impressions	Post Engagements	Clicks

CTR

Sustaining: 6.77%
Germany: 3.13%
UK: 2.94%
Weddings: 2.75%

Travel industry benchmark: 0.9%

In January, the Sustaining campaign continued, while the Weddings, UK, and Germany campaigns launched early in the month. Arts and Culture followed on January 30.

Performance was exceptional, with Sustaining achieving a 7.31% CTR. All campaigns exceeded the 0.9% industry benchmark. Together, the campaigns generated over 7 million impressions, amplifying reach and impact.

Media | Paid Social

Meta: Year-To-Date

12,181,974	384,705	131,178	1.08%
Total Impressions	Post Engagements	Clicks	CTR

Media | Paid Social

Pinterest: January

741,439	9,870	4,650
Total Impressions	Engagements	Clicks

CTR

Sustaining: 0.63%

Wedding: 0.63%

Travel industry benchmark: 0.3%

In January, the Sustaining campaign continued to run, and the Weddings campaign successfully launched early in the month.

Performance was strong, with both campaigns achieving a 0.63% CTR—more than double the industry benchmark of 0.3%.

Together, they generated over 740,000 impressions, significantly expanding reach and visibility.

Media | Paid Social

Pinterest: Year-To-Date

941,650	11,995	6,053	0.64%
Total Impressions	Engagements	Clicks	CTR



5

Digital Media Insights

Expedia | January Room Night Results - Disaster Recovery

From those exposed to the Expedia advertising in the month of January came the following performance

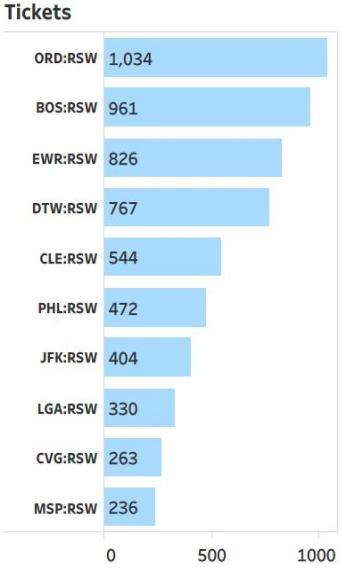
Impressions	Clicks	CTR	Ad Spend	Room Nights	VR Nights	Air Tickets	Travelers	Revenue	ROAS
2,943K	2,042	0.07%	$44K	1,955	2,510	8,529	10,687	$4,519K	102.8

Highlights:

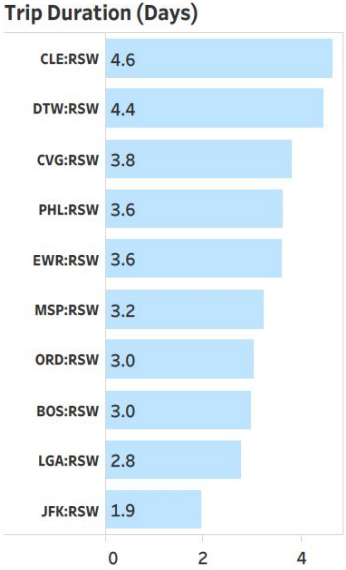
- The advertising drove **1,995 room nights** for total gross bookings of $4,519,000
- The largest share of bookings came from Expedia ($3,393,000 with VRBO second ($1,126,,000)
- The $4,519,000 in gross bookings made for a **102.70 Return on Ad Spend**
- **8,529 Airline Tickets** were sold to those exposed to the advertising
- The largest percentage (32.6%) booked 31 to 60 days out. The second largest was 17.2%, booking 61 to 90 days out

Expedia | January Flight Results - Disaster Recovery

Flights booked on Expedia from those exposed to advertising







The most tickets were sold from the Chicago, Boston, and Newark markets.

Cleveland had the longest stay in market, at 4.6 days.

Expedia | January Room Night Results - Sustaining

From those exposed to the Expedia advertising in the month of January came the following performance

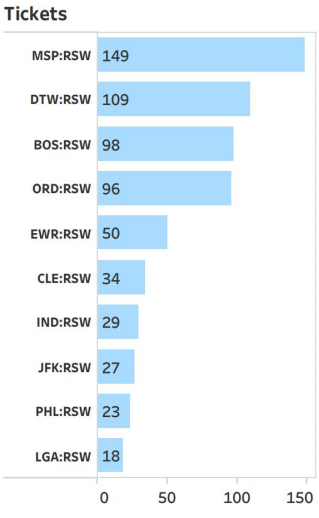
Impressions	Clicks	CTR	Ad Spend	Room Nights	VR Nights	Air Tickets	Travelers	Revenue	ROAS
369K	1,033	0.28%	$11K	556	890.9	744	1,491	$798K	70.7

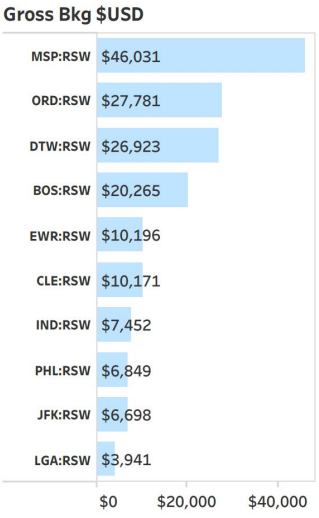
Highlights:

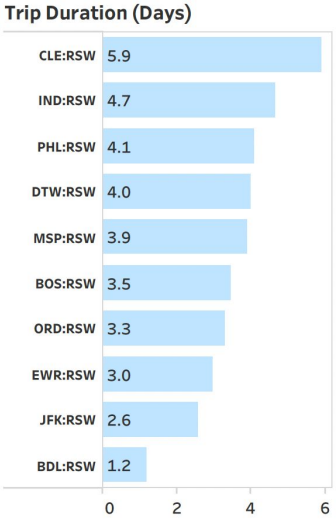
- The advertising drove **556 room nights** for total gross bookings of $798,000
- The largest share of bookings came from VRBO ($414,000 with ExpediaPlus US second ($344,000)
- The $798,000 in gross bookings made for a **72.55 Return on Ad Spend**
- **744 Airline Tickets** were sold to those exposed to the advertising.
- The largest percentage (24.6%) booked 31 to 60 days out. The second largest was 18.2%, booked 0 to 6 days out.

Expedia | January Flight Results - Sustaining

Flights booked on Expedia from those exposed to advertising







The most tickets were sold from the Minneapolis, Detroit and Boston markets.

Cleveland has the longest stay in market, at 5.9 days.

Expedia | January Room Night Results - UK

From those exposed to the Expedia advertising in the month of January came the following performance

Impressions	Clicks	CTR	Ad Spend	Room Nights	VR Nights	Air Tickets	Travelers	Revenue	ROAS
123K	149	0.13%	$3K	7	39.71	3	27	$27K	8.2

Highlights:

- The advertising drove **7 room nights** for total gross bookings of $27,000
- The largest share of bookings came from Homeaway ($24,000 with Expedia second ($3,000)
- The $27,000 in gross bookings made for a **9.00 Return on Ad Spend**
- **3 Airline Tickets** were sold to those exposed to the advertising.
- The largest percentage (31.4%) booked 61 to 90 days out. The second largest was 20.9%, booked 14 to 20 days out.

Expedia | January Room Night Results - Germany

From those exposed to the Expedia advertising in the month of January came the following performance

Impressions	Clicks	CTR	Ad Spend
106K	194	0.18%	$3K

Highlights:

- The advertising drove **106k impressions and 194 clicks**
- The Germany Expedia campaign did not go live until 1/20, which is why performance is not as high as our other Expedia campaigns, we expect higher performance throughout the remainder of the campaign.

Digital Media ROAS | Year to Date Results

$377,081	$829,519	$1,206,600	$85,207.21
Adara Impact hotel revenue.	**Expedia** hotel and vacation rental revenue.	**Total Revenue** from those exposed to digital advertising in FY24	Spent in January digital advertising

FY25 ROAS = 14.16X Return on Ad Spend

Adara IMPACT | January Results

From those exposed to our digital advertising in January the following results were shown.

223
Hotel Bookings

7,665
Hotel Searches

$377,081
Hotel Revenue

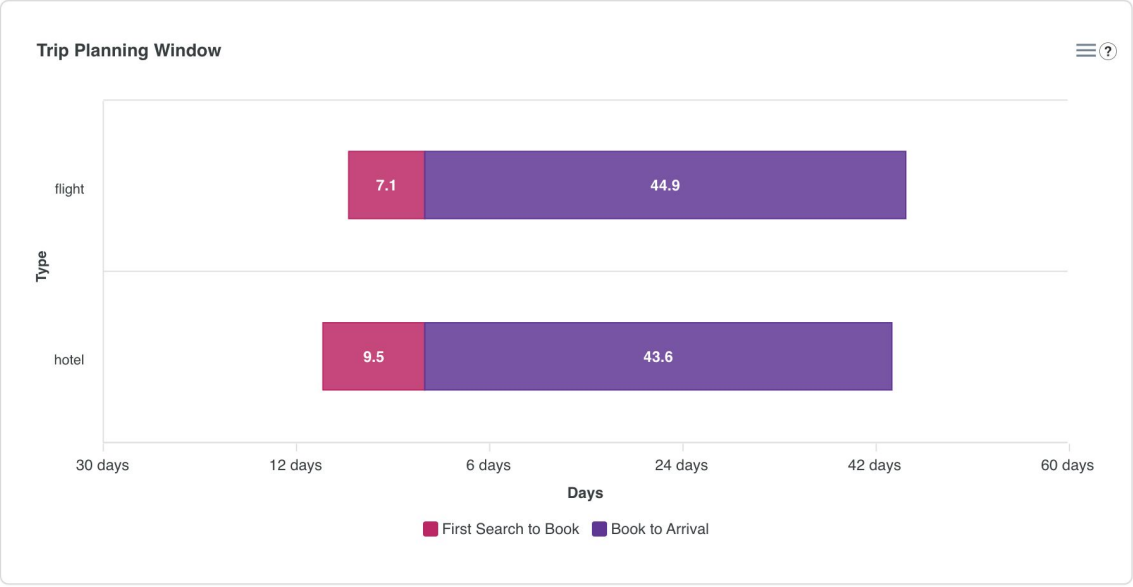
3,123
Flight Bookings

34,520
Flight Searches

16,184,378	**73,432**	**26,726**
Total Impressions	Total Clicks	Total Trackable Website Visits

Adara IMPACT | January Booking Window

From those exposed to our digital advertising in January the following results were shown.



Booking Windows:
The booking window - from when they booked to arrived in destination - for flights was approx. 45 days, about 6 weeks.

The booking window - from when they booked to arrived in destination - for hotels was 43 days, also about 6 weeks.



THANK YOU

National Public Relations Update

TDC Meeting

Services conducted in January 2025

LHG & CVB PR EFFORTS

LOU HAMMOND GROUP

Media Highlights

NAPLES MARCO ISLAND EVERGLADES℠
FLORIDA'S PARADISE COAST

Media Impressions: 159,566,313
Media Value: $96,173.96

Southern Living®

21 Southern Islands Where You Can Shake Off The Winter Blues

Winter can be a little underwhelming in the South. While our neighbors up north are blanketed in snow and enjoying all the fun (skiing, snow ice cream, and the like) that comes along with it, we're often left with nothing more than freezing rain, icy roads, and less-than-stellar attitudes. If you're feeling stuck in the doldrums of winter, a change of scenery may be just what you need to clear your mind and your reset your mood. After all, there are only so many days you can embrace the chilly gloom with a movie marathon. This winter, set your sights on sunnier days with an island escape that'll be a surefire cure to the cold-weather blues. While the tropical shores of Barbados or Turks and Caicos may be first to come to mind when brainstorming getaway destinations, we challenge you to think again. The South is home to dozens of great islands that can provide a similar beachy experience with far less travel time. With average temperatures ranging from the 60s to mid-70s, you'll be well on your way to a full dethaw after just one day of fun in the sun on these islands.

Marco Island, Florida



You know you've done something right when you book a trip to a place that's located on Florida's Paradise Coast. Opt for a nostalgic Old Florida weekend by staying at the Olde Marco Island Inn & Suites, which has been around since the late 1800s. Search for sand dollars at Tigertail Beach or go paddle boarding on the calm waters of Tigertail Lagoon. As one of Florida's Ten Thousand Islands, Marco Island is as close to wild Florida as you can get.

LEARN MORE ABOUT MARCO ISLAND

20 Florida Beaches That Could Pass For The Caribbean

What if we said you could visit the Caribbean without a passport? Or that you could plant your chair in white sand, dip your toes in clear water, and listen to palm trees swaying—without leaving the States? While Florida isn't actually part of the Caribbean, it does have magnificent beaches that convincingly mimic the blue waters of everyone's favorite tropical sea. When you don't have the time (or the budget) for jet-setting, you need only follow the curves of the Florida coast to find a slice of ocean-lapped sand that speaks to you. Whether you seek gorgeous water, quaint beach towns, abundant wildlife, or a mix of all three, you'll discover an oceanfront spot that tempts you to extend your vacation a little bit longer. So pack your sunscreen, leave your worries behind, and breeze on down to the Sunshine State for these 20 fantastic seaside destinations.

Naples/Marco Island

Although in-the-know locals flock here on the weekends, most beach connoisseurs don't even realize this pristine seven-mile stretch of paradise exists. A barrier island located between Marco Island and Naples, Keewaydin Island is mostly undeveloped land, lending the spot a remote vibe you'll love. Since there are no roads, cars, or bridges, you'll need to a boat to get around. For that, try the services of Hemingway Water Shuttle. When you're not sunning yourself, take a trip to Rookery Bay, one of the few remaining undisturbed mangrove estuaries in North America, or watch for wildlife, including loggerhead sea turtles, wild boars, and bobcats.

paradisecoast.com; barrier island beach between Naples and Marco Island, Marco Island, FL 34145

Media Highlights

NAPLES MARCO ISLAND EVERGLADES℠
FLORIDA'S PARADISE COAST

Forbes

85 Chefs Share Their Restaurant Trend Predictions For 2025

The new year is here and so are tons of new trends. We live in a society where going out to eat isn't merely to get food into our bellies — it's an experience, how we spend quality time with our friends and family, and a way to enjoy insanely delicious creations by talented chefs while supporting our local economy.

As a lover of a great meal and sharing the passionate stories of chefs all over the world, one of my favorite questions to ask is: what do you think will be trending in the restaurant world in the upcoming year? I asked, and I got answers. Over 300 chefs shared their thoughts with me about this year's trending topics in restaurants.

From turning to AI to help enhance the consumer experience to a "less is more" attitude when it comes to ingredients (by making sure to source locally and build relationships with farmers) to finding inspiration in lesser talked about cultures, there's a lot cooking up in kitchens this year.

While I wish I could share every prediction, here are 85 predictions about the dining scene in 2025 from chefs and industry professionals all over the country.

"Local appetites are shifting towards sustainable and ethically sourced foods. We're seeing increasing demand for transparency in sourcing, prompting us to partner more closely with local farmers. To reflect these trends, I'll be incorporating more plant-based options, highlighting local ingredients, and offering dishes that cater to health-conscious diners." **- Kayla Pfeiffer, owner of Bicyclette Cookshop in Naples, Florida**

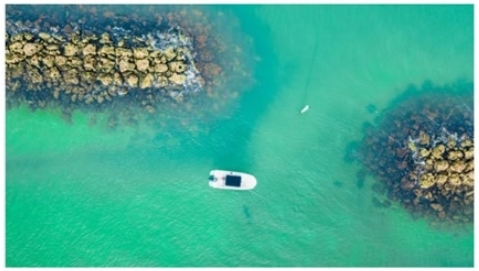
Outside

The Top 13 Beaches in Florida for Sun and Adventure

Done with cold weather? From the Keys' turquoise waters to the Panhandle's white-sand shores and beyond, here are the Sunshine State's best beaches to visit.

Best Florida Gulf-Coast Beaches for Fearless Frolics

Marco Island, Tigertail Beach



Location: 18 miles south of Naples in Southwest Florida

Why We Love It: Its sugary sands are a stepping-off point to explore the nearby Ten Thousand Islands—a dazzling archipelago of mangrove islets.

Marco Island's six miles of beach is a Florida-family favorite for molten Gulf-Coast sunsets and sand as soft and blindingly white as it gets. If you're looking to add a jolt of adrenaline to your getaway here, book a guided jet ski excursion through Marco Island Jet Ski Tours (from $245 per person, for two hours) into the Ten Thousand Islands and Rookery Bay. En route, you'll be escorted into a jungle of mangroves and unique South Florida habitats that regular boats can't access. You'll navigate through pristine red mangrove forests and over grassy flats, and naturalist guides will point out manatees, dolphins on the hunt, and roseate spoonbills, among more of the region's prolific wildlife.

Don't Miss: For quieter explorations with birdwatching, shelling, and tidal pools in the mix, drive all the way south to Tigertail Beach, cross five boardwalks (about ten minutes walking), then hike along the lagoon's edge until you reach wide-open white sands.

the knot

The 10 Best Honeymoon Destinations in April

From spring blossoms to Mediterranean islands in the sun.

Shoulder season is often a great time to discover some of Europe's vibrant capital cities and buzzy islands sans crowds while also snagging more affordable deals. The Knot has done the heavy lifting for you and pulled together some of the best honeymoon destinations in April everywhere from California wine country to the land down under when Australian autumn is in full swing and it's the ideal moment to snorkel the Great Barrier Reef.

Indulgent accommodations are among the top travel trends for 2025, and you'll find sumptuous suites with butler service everywhere from San Miguel de Allende in Mexico to dreamy European capitals like Florence and Paris. When researching the best honeymoon destinations by month, these top honeymoon spots checked all the boxes, offering once-in-a-lifetime experiences, fantastic weather for sightseeing and outdoor attractions, swoon-worthy white-sand beaches and charm at every turn. From romantic road trips in the American South to island hotels on the opposite side of the globe, here's where to honeymoon in April.

Naples, Florida

Once the snowbirds start heading back north, you'll snag better hotel deals on ritzy resorts in Naples, Florida, a beach locale that's less of a party scene and more about culture and nature. It's always beach weather in Naples, but it won't be too balmy yet in April. The dining scene here continues to evolve with award-winning concepts and romantic locales at beachfront resorts and along the well-heeled historic downtown area of Fifth Avenue South, so culinary lovers will definitely get their fill of fantastic wine and food on their Naples honeymoon.

Things to Do: There are plenty of stunning beaches lining Naples' shores, but after a few beach days, you'll want to get out on the water for dolphin tours or shelling around nearby Marco Island and the Ten Thousand Islands with locally based Breakwater Adventures. Start the evening with drinks and Italian-inspired pub fare at Bar Tulia or head next door to chef Vincenzo Betulia's namesake Osteria Tulia for rustic homemade fare in a space modeled after an Italian farmhouse.

Places to Stay: Inn on Fifth places couples within walking distance of downtown's shops and galleries, and despite being on the boutique side, it exudes a resort feel thanks to the rooftop pool and bar complete with a firepit, as well as two fine-dining options: Ocean Prime and Truluck's. One of the area's icons, beachfront The Ritz-Carlton, Naples is fresh off a renovation and offers luxe amenities like poolside butlers and climate-controlled bungalows by the resort pools.

Storytelling

Monthly Pitches

- Sustainability at Bicyclette Cookshop
- Spring Travel: What to Do, Where to Stay and Where to Dine
- The Best Solo Vacation Destinations in the South
- Sunny Escapes
- Luxury, Multigenerational Travel
- Darkest Skies in the U.S. for Stargazing
- Naples, Florida: Where Your Champagne Dreams Come True
- Here's How to Plan the Perfect Trip to the Pickleball Capital of the World
- Paradise for Two: Valentine's Day Vacations

Media Relations

Conference Attendance

- LHG represented the destination at the International Media Marketplace (IMM) in NYC on January 23. This premier event connects top travel editors, journalists and PR professionals, fostering media coverage and press trips. LHG engaged with 20+ leading writers and editors, securing opportunities for coverage in renowned outlets such as:
  - *Vogue*
  - *National Geographic*
  - *Lonely Planet*
  - *Saveur*
  - *Condé Nast Traveler*
  - *Forbes*
  - *ShermansTravel*
  - *Time Out*
  - *AFAR*
  - *Travel + Leisure*
  - *Fifty Grande*

Partner Communications

Partner Newsletter

- Agency assisted in creating monthly CoastLines Newsletter and deployment to partners on January 28

Partner Relations

- Chef Kayla Pfeiffer, Bicyclette Cookshop
- Florida Stone Crabbers Association's Kelly Kirk and Holly Dudley
- Thomas Lockyear, Museum of the Everglades
- The Perry Hotel Naples

Awards

- LHG is gathering materials to submit to the 2025 Stella Awards from Northstar Meetings Group on behalf of the CVB and its partners
- Naples/Marco Island KOA Holiday was recognized with the KOA ICON Award for its exceptional operational excellence, customer satisfaction and commitment to the KOA brand.

Thank you!

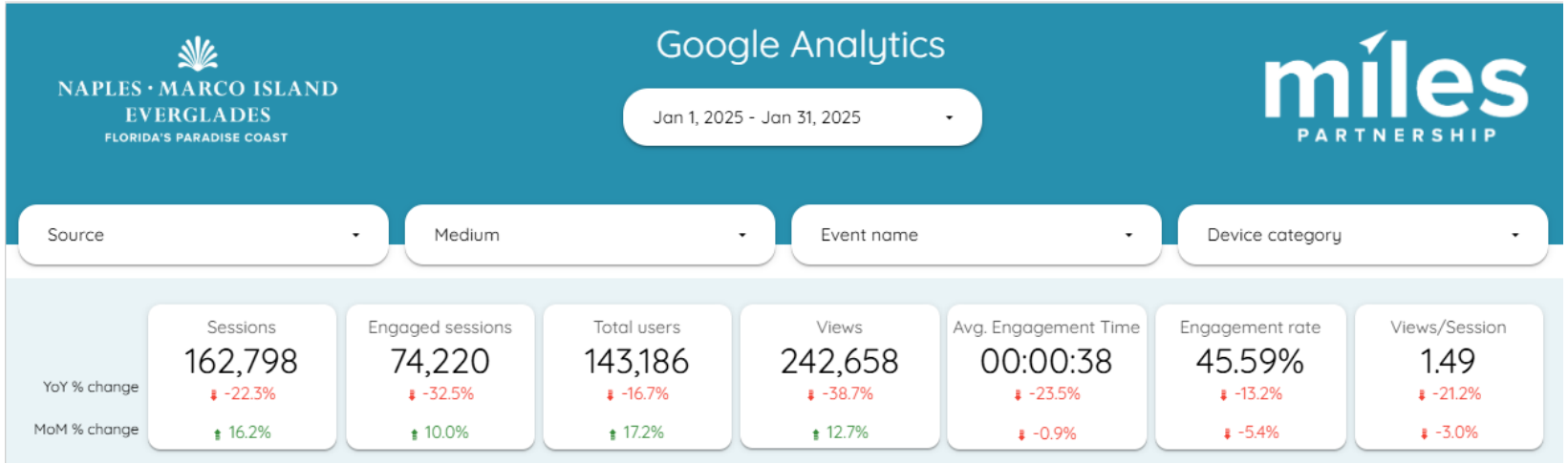
Proud to be your Partner in Paradise!



NAPLES · MARCO ISLAND EVERGLADES℠

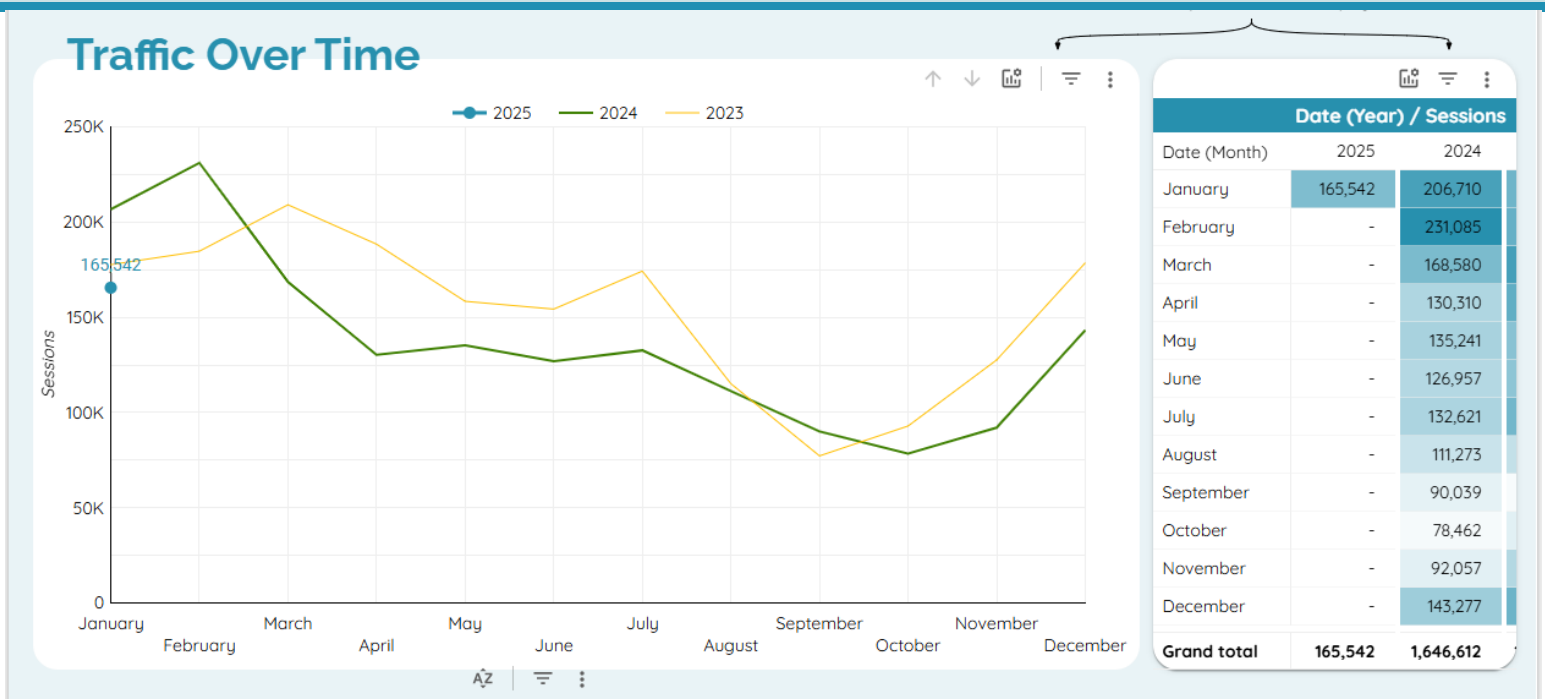
FLORIDA'S PARADISE COAST

Miles Partnership Website Analytics
January 2025



NAPLES · MARCO ISLAND EVERGLADES℠
FLORIDA'S PARADISE COAST

TRAFFIC OVER TIME



Date (Year) / Sessions		
Date (Month)	2025	2024
January	165,542	206,710
February	-	231,085
March	-	168,580
April	-	130,310
May	-	135,241
June	-	126,957
July	-	132,621
August	-	111,273
September	-	90,039
October	-	78,462
November	-	92,057
December	-	143,277
Grand total	**165,542**	**1,646,612**

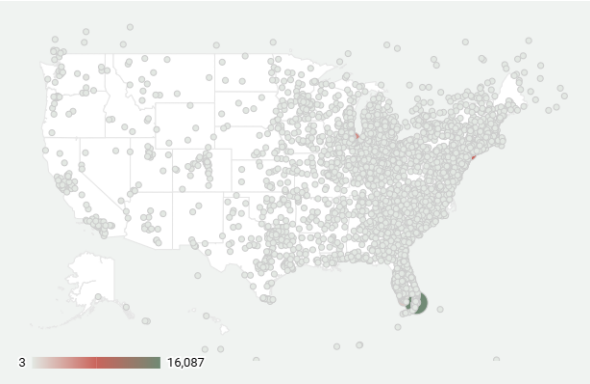
NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

TOP PAGES ACROSS ALL TRAFFIC TYPES

1.	**Homepage**	**38,505 views**
2.	**Beaches** landing page	**26,859 views**
3.	**Arts & Culture** landing page	**9,400 views**
4.	**Events** landing page	**9,191 views**
5.	**Weddings** landing page	**6,936 views**
6.	**Marco Island** landing page	**5,596 views**
7.	**Spanish** homepage	**4,500 views**
8.	**TTD Marco Island** article page	**4,386 views**
9.	**Golf Courses** article page	**3,563 views**
10.	**Dining** landing page	**3,460 views**

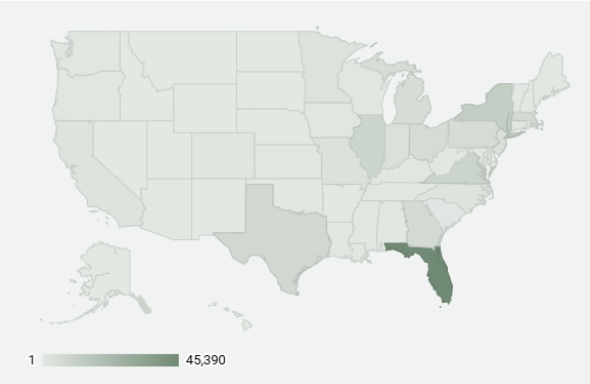
NAPLES · MARCO ISLAND EVERGLADES℠
FLORIDA'S PARADISE COAST

TOP LOCATIONS



Top Cities

1.	Miami	16,087 sessions
2.	(not set)	14,448 sessions
3.	New York	8,122 sessions
4.	Ashburn	6,725 sessions
5.	Chicago	5,587 sessions

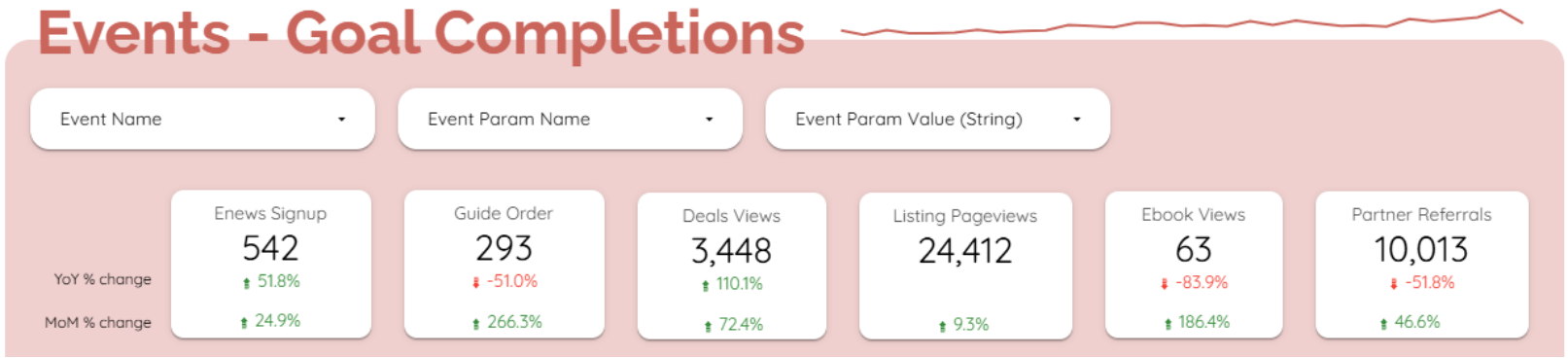


Top Regions

1.	Florida	45,930 sessions
2.	New York	12,413 sessions
3.	Virginia	9,317 sessions
4.	Illinois	9,234 sessions
5.	Texas	7,630 sessions

NAPLES · MARCO ISLAND EVERGLADES℠
FLORIDA'S PARADISE COAST

EVENTS – GOAL COMPLETIONS



NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

DEFINITIONS

ENGAGEMENT

Sessions (session_start): A session is a group of user interactions with your website or app that take place within a given time frame. A session initiates when a user either opens your app in the foreground or views a page or screen and no session is currently active. A session ends (times out) after 30 minutes of user inactivity.
Engaged Sessions: The number of sessions that lasted longer than 10 seconds, or had a conversion event, or had 2 or more screen or page views.
Users (Unique Users): Total number of unique users who logged an event
Pageviews (page_view): Fires immediately when the web browser begins to load a page.
Engagement Time (engagement_time): The average length of time in seconds that the app was in the foreground, or the website had focus in the browser
Engagement Rate (engagement_rate): The percentage of engaged sessions (Engaged Sessions divided by Sessions) - the inverse of bounce rate **note:** the engagement rate overall total for traffic types will not match the scorecard since it is taking the average of the averages - rely on the scorecard for this metric
Pageviews/Session (views_per_session): the number of web pages your users viewed per session

EVENTS

Event Count/Count: The number of times users triggered an event.
Event Name: Name of the recommended or custom events created.
Event Param Name: Name of a parameter. Parameters provide additional information about the ways users interact with your website.
Event Param Value (String): The returned value of the event parameter.

MoM: Month over Month
YoY: Year over Year

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST


THANK YOU

Collier COUNTY MUSEUMS

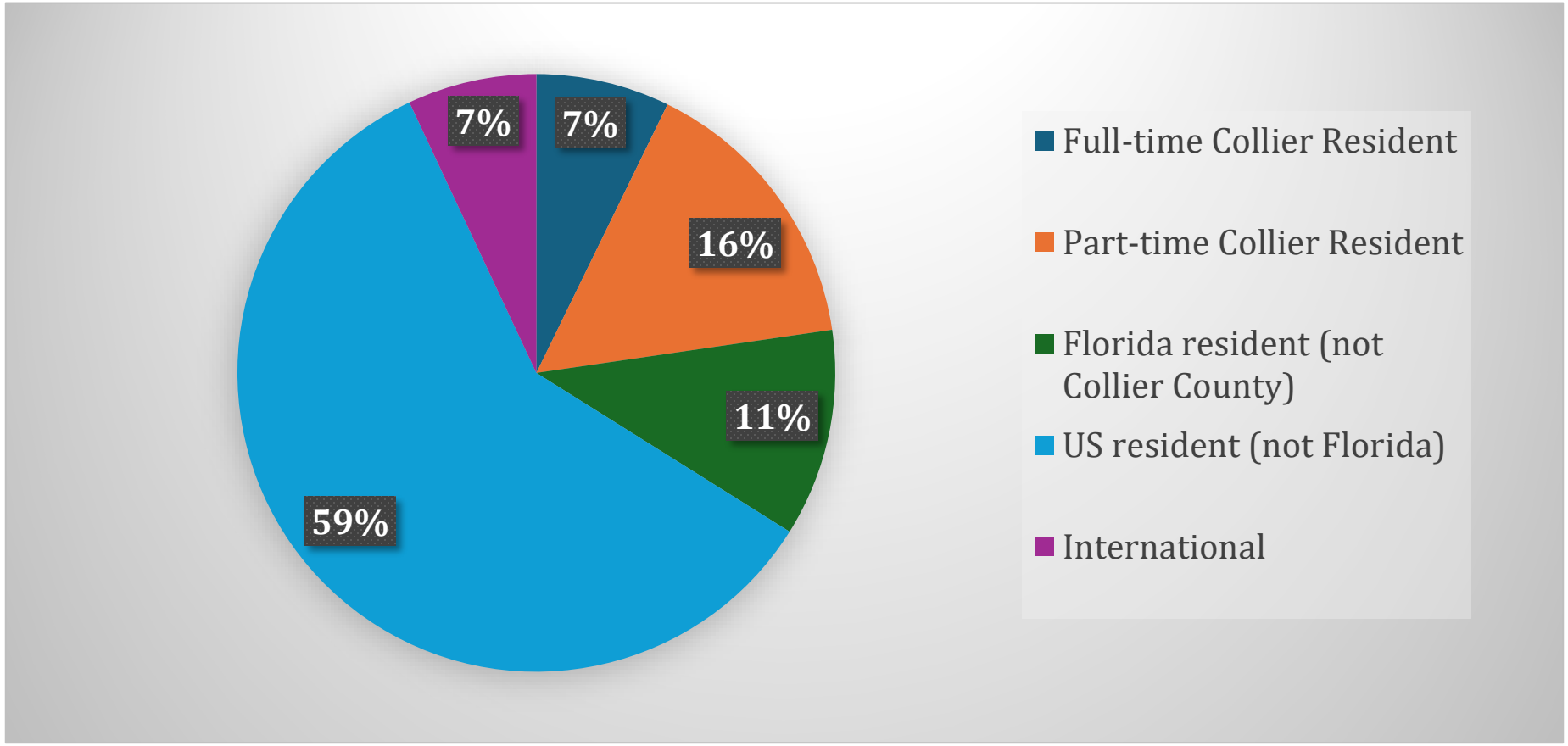
VISITATION

January 2025

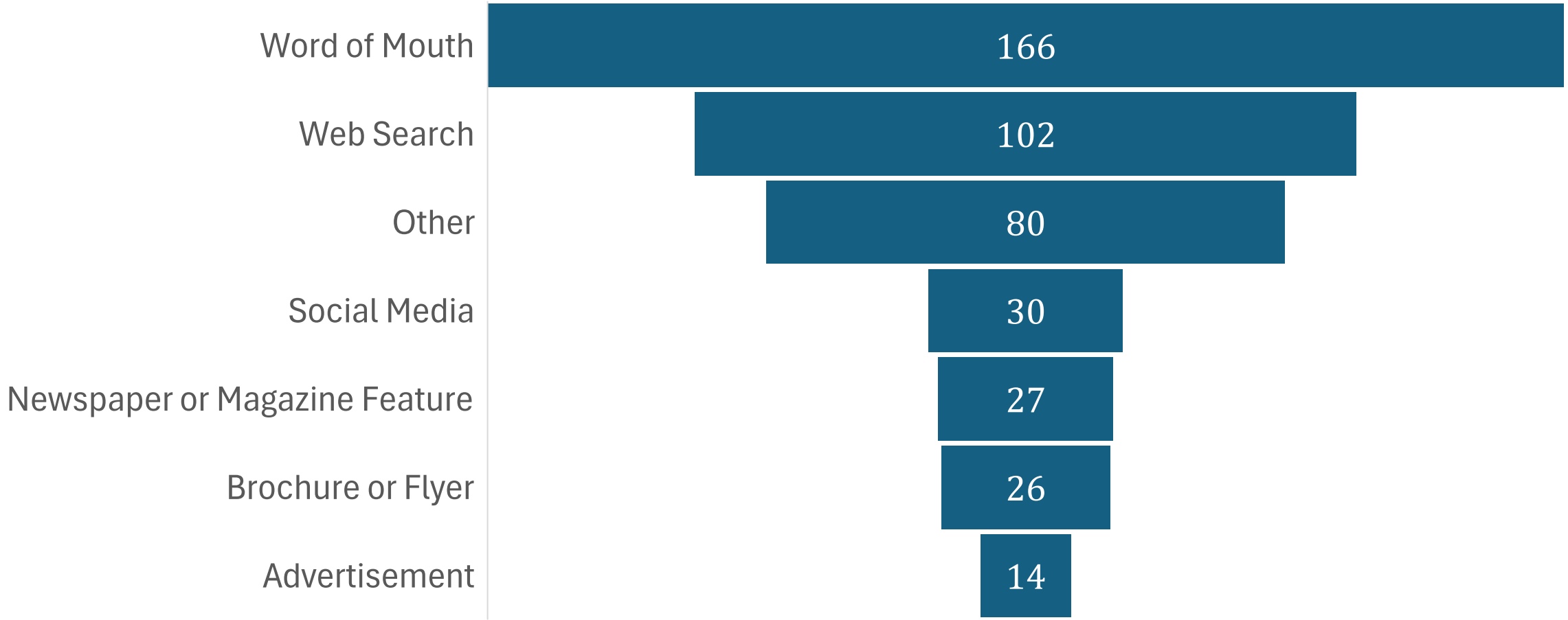
7,646 TOTAL VISITORS IN JANUARY

	January 2024	January 2025
Collier Museum at Government Center	972	857
Immokalee Pioneer Museum at Roberts Ranch	603	629
Marco Island Historical Museum	3,308	3,781
Museum of the Everglades	1,736	1,837
Naples Depot Museum	343	542
TOTAL	**6,962**	**7,646**
Outreach: Educational	543	339
Outreach: Marketing	98	76

Where are you from?



How did you hear about us?



How would you describe your experience at the museum today?

Very impressed with the museum and its exhibits. Very friendly employees.

Very interesting, varied information, good local history and broader context

Very informative and laid out in a way that was easy to follow and learn, lots of large pictures and artifacts. Loved the dredge animation and scale model

Very impressed… The artifacts and information are well presented. The staff were very nice and answered all my questions. I'm sure I'll stop in again on my next visit.

We learned a lot— enjoyed learning about recent past and indigenous history. Fascinating!

Customer Satisfaction

	AVERAGE	MAXIMUM
Please rate your overall experience with this Museum.	4.86	5.00
How satisfied were you with the service you received?	4.91	5.00
How likely are you to recommend this Museum to a friend or colleague?	9.47	10.00

How likely are you to recommend this Museum to a friend or colleague?



Current Exhibits





Memories of Collier County through the Art of Phil Fisher

Collier Museum at Government Center

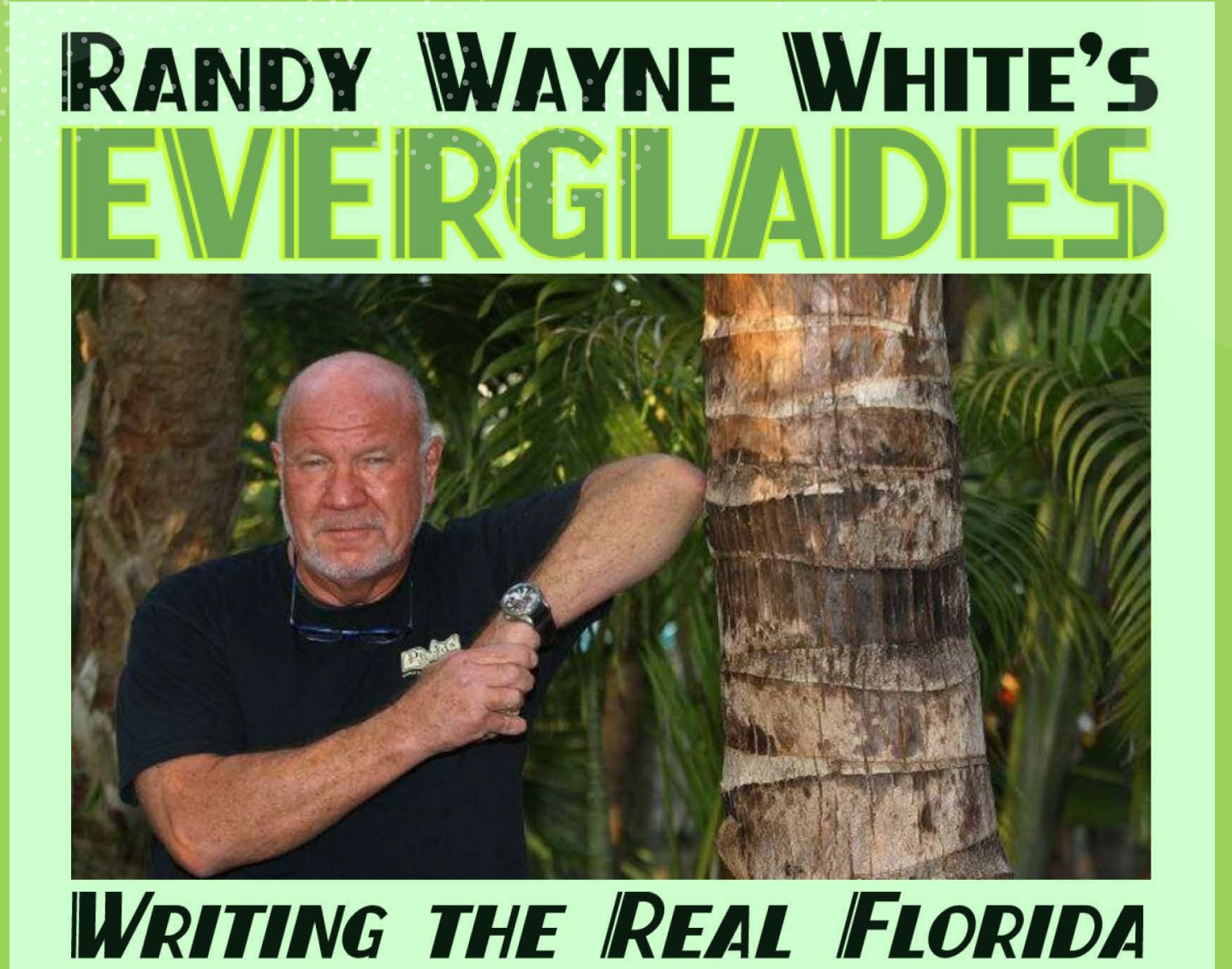
February 1 through April 30, 2025

Opening reception February 6, 2025 from 4:30 PM to 6:30 PM

Collier County Museums

Museum of the Everglades

January 14 – May 3



Perspectives from Southwest Florida Ranch Life

The Photography of Meagan Watkins



Immokalee Pioneer Museum at Roberts Ranch

February 11 – May 31

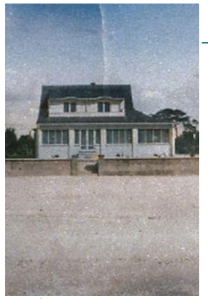


The Florida House: Marco Island's Mackle-built Homes

February 25 – June 7
Marco Island Historical Museum

UPCOMING PROGRAMS

colliermuseums.com for more information



March 19

Spring Homeschool Day

Marco Island Historical Museum



March 19

Wilderness Wednesday

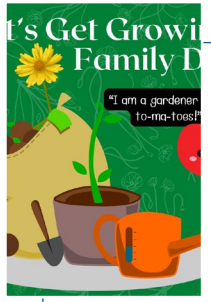
Museum of the Everglades



March 20

Third Thursday Lecture

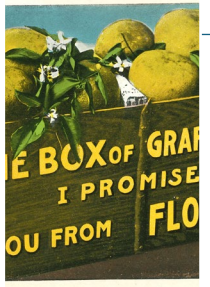
Museum of the Everglades



March 22

Let's Get Growing Family Day

Collier Museum at Government Center



March 28

Grapefruit Gala

Museum of the Everglades



April 8

Second Tuesday Lecture

Collier Museum at Government Center

TDC Collier County - Meeting date: Mar 18, 2025

STAFF REPORTS

The following is a report encapsulating the staff activity for the time period Jan 1-31, 2025.

This detailed report contains activities, actions, recaps and actionable learning by focus disciplines.

TABLE OF CONTENTS

		Page(s)
1.	Staff Topline activities	3-4
2.	Arts & Culture	5-6
3.	Group Meetings	7-8
4.	Midwest Sales	9-10
5.	Specialty Markets	11-12
6.	PR & Communications	13-14
7.	Social & Digital Media	15
8.	Global Travel Trade	16-17
9.	International Sales UK & Ireland	18-19
10.	International Sales Germany	20-21

STAFF TOPLINE ACTIVITIES

ARTS & CULTURE

- Held a meeting for ¡ARTE VIVA! partners to hear about advertising to date, a review of the fall events, and initial discussions for the 2025-2026 season.
- Filmed an interview with artist Rafael Lozano-Hemmer about the *Obra Sonora* exhibition for the Meet the Artist series.

GROUP MEETINGS

- Attended Northstar Meeting Group's Independent Planners Education Conference IPEC 2025 in Atlantic City, NJ January 25-29, 2025
- Site Visit of new The Perry Hotel January 30, 2025 and Hard Hat Site Tour of The Naples Beach Club, a Four Seasons Resort January 31, 2025

MID-WEST SALES

- 1 meeting booked 68 rooms for February 2026
- Event Sponsor for SITE Chicago AGM with podium and video presentation 140pp attended

SPECIALTY MARKETS

- RCMA Emerge! participation continues to yield leads & high-Impact opportunities.
- Florida Fatigue was noted at NY Travel & Adventure Show, a show mainly focused on consumers attending.

PR & COMMUNICATIONS

- Earned media efforts for January 2025 resulted in 159,566,313 media impressions with a Media Value of $96,173.96.
- Media highlights include placements in Southern Living, Forbes Magazine, Outside and The Knot.

SOCIAL & DIGITAL MEDIA

- Continuing CVB Website transition to Granicus.
- Assisting the National Brand Pink Lily with filming permits.

LEISURE SALES

- Discover Airlines will operate non-stop flights from Frankfurt (FRA) to Fort Myers (RSW) twice weekly in Summer 2025.
- We are collaborating with Lee County and LCPA on a targeted marketing campaign to maximize German visitation in the shoulder months.

UK & IRELAND

- The team participated with the annual Visit USA UK Meet the Media event for leading travel editors, travel writers and content creators – with an estimated 68 media in attendance. Met with a selection of media including: Cassam Looch, Content Director, Culture Trip; Rhodri Andrews, Special Projects Editor, Travel Weekly and Kav Dadfar, Co-Founder, Editor of JRNY Magazine.
- Distributed a newsletter titled "Recharge in Paradise: The holiday after the holiday in Florida's Paradise Coast" which secured standalone media coverage in print in The Scottish Sun and online on TTG. *Total reach: 249,907 | Total EAV: $4,264*

DIAMONDE

- Appointment scheduling and preparations for our attendance at ITB 2025
- Launch of our B2C/B2B campaign w. CANUSA Touristik and go2travel Switzerland

ARTS AND CULTURE
John Melleky, Arts and Culture Manager
Reporting Period: January 1-31, 2025

TDT Arts and Culture Grants

- Finalized updates to financial reimbursement forms. Created a presentation about the reimbursement process and set up a webinar to be held on February 4, 2025.

General CVB Projects

- **Budget**: Prepared materials and executive summary for the January TDC budget presentation.
- **Call for Artists:** Selected artists for the notecards and Tourism Star Awards award.
- **Website:** Attended meetings with Granicus on the new website project.
- **Tourism Impact Studies:** Attended kickoff meeting for Sun N Fun and Paradise Coast Sports Complex studies.
- **Budget and expenses**: Responded to general questions from the Office of Management and Budget on bills, invoices, and grants.

¡ARTE VIVA! – Hispanic Art Festival

- Created a presentation and held a meeting on January 14, 2025, for partners. Provided an update on advertising and discussed possible plans for 2025-2026.
- Filmed artist Rafael Lozano-Hemmer at Artis—Naples regarding the *Obra Sonora* exhibition.
- Attended events -see outreach section

Public Art Committee

- Prepared materials, agenda, minutes, and board packet for the Public Art Committee meeting on January 22, 2025.

Outreach to Arts and Culture Organizations
Outreach to organizations includes meetings, introductions, and attending various arts and cultural activities throughout the month.

- **January 4:** New Year's Art Fair
- **January 6:** Artis – Naples Los Lobos (¡ARTE VIVA! event)
- **January 7:** Leadership Collier – spoke on a panel on Tourism Commerce
- **January 7:** Artis – Naples – marketing committee meeting
- **January 7:** Artis – Naples, Naples Philharmonic Masterworks concert
- (¡ARTE VIVA! event)
- **January 11:** Nash to Naples concert
- **January 14:** International Festivals and Event Association – Government and CVB Advisory Group virtual meeting
- **January 14:** United Arts Collier - meeting
- **January 14:** Marco Island Center for the Arts – exhibition opening
- **January 15:** Conservancy of SW Florida – annual meeting
- **January 16:** United Arts Collier – exhibition opening at Moran Wealth Management
- **January 17:** Theatre Zone - *Once*
- **January 18:** Seraphic Fire – concert (¡ARTE VIVA! event)
- **January 22:** FGCU – meeting with Bower School of the Arts

- **January 22:** United Arts Collier – kickoff of Arts and Business Alliance
- **January 23:** United Arts Collier – public meeting Arts and Business Alliance
- **January 25:** Naples Art District – Plein Air Festival at Naples Botanical Garden
- **January 25:** Hotworks Art Show
- **January 25:** Mercato Art Fair (¡ARTE VIVA! event)
- **January 28:** FGCU Bower School – follow up meeting on CVB partnerships
- **January 30:** Artis – Naples – filming of Rafael Lozano-Hemmer for Meet the Artist Series
- **January 30:** The Perry Hotel – tour
- **January 31:** Naples Beach Club – hard hat tour
- **January 31:** Naples Art District – Art After Dark

Upcoming Strategic Initiatives

- Test TDT Grant final report forms.
- Meet with artists chosen for notecards and awards.
- Create the call to artists for the ¡ARTE VIVA! poster.

GROUP MEETINGS SALES

Lisa Chamberlain, CMP, Group Sales Manager
Reporting Period: January 1-31, 2025

	2025	2024
Number of Meeting Planner Contacts	76 (vs.57 in Dec; 44 in Nov; 47 in Oct; 52 in Sept)	95 in Jan 2024
Number of RFP leads sent to hotel partners	30 leads sent (12 in Dec; 16 in Nov; 41 in Oct; 23 in Sept)	28 leads sent
Number of Shows Attended	1 in Jan (vs. 1 in Dec; 0 in Nov.; 0 in Oct; 0 in Sept; 1 in Aug; 2 in July)	2 in Jan; 0 in Dec; 1 in Nov; 1 in Oct; 0 in Sept

Events Attended / Sales Activity

- Strategic Planning Meeting with Outlyr – Sandy Diamond re: Chubb Classic
- Attended Northstar Meeting Group's IPEC 2025 Conference &Appointment Show Jan 26 – 28, 2025 in Atlantic City, NJ
- Finalizing plans & booth details for Visit Florida's FLORIDA ENCOUNTER Feb 2-4, 2025 Ocala, FL
- Follow up of Smart Meetings' Incentive Experience Phoenix, AZ December 8-10, 2024
- Meeting with Commissioner Chris Hall for TDC Chair Orientation Discussion January 8, 2025
- Destination Overview with Maura Zhang and new rep Melissa Glazier, Synergy Destinations January 8 – 10, 2025
- Florida Bankers Association Planning call with Pam Ricco January 15, 2025
- Planning Meeting for upcoming HelmsBriscoe Florida Reps Region Q1 Meeting at Naples Grande in March January 17, 2025
- Tourist Development Council Meeting January 21, 2025
- Preparation for Incentive Research Foundation's Destination Package for June IRF Invitational January 21, 2025
- Meeting at offices with Jessica Castillo with CONNECT Meetings January 22, 2025
- ConventionSouth Article Review January 23, 2025
- Networking Event for Meeting Planners at Compass by Margaritaville January 30, 2025
- Site Visit at The Perry Hotel January 30, 2025
- Hard Hat Site Tour at The Naples Beach Club, a Four Seasons Resort January 31, 2025
- Coastlines article submission

Upcoming Strategic Initiatives

- Recovery Messaging to clients to ensure they are aware that we are open for business
- Follow up from recent Smart Meetings Incentive Experience December 8-10, 2024
- Compiling our FY24/25 Travel Calendar, outlining upcoming shows and events that are valuable to attend.
- Planning content for monthly Meeting Escapes email to planners with Paradise Advertising
- Working with Paradise Advertising on new group sales document content – requesting updated contacts; specific capacities; and new images for our collateral sales piece.
- We continue to work with Paradise Advertising on social media content for LinkedIn posts to highlight relevant educational content in my monthly posting.

Looking Forward

- **February 2-6:** Visit Florida's Florida Encounter 2025 Ocala, FL
- **March 9-10:** Imagine Solutions Conference 2025 Naples, FL



Northstar Meeting Group's IPEC 2025 Atlantic City, NJ January 25-28, 2025

SYNERGY CONNECT - MIDWEST REPS
Reporting Period: January 1-31, 2025

Subject	January 2024	January 2025
Number of Meeting Planner Contacts	150	200
Number of RFP leads sent	27	21
Number of Shows Attended	2	2

RFPS

Event Name	Organization	Contact	State	Dates	Room Nights
2026 MRCA Winter Board and Committee Meeting	HelmsBriscoe	Tanya Baker	OH	January 24-28, 2026	129
2025 Williams, Parker Attorneys Spring Retreat	Maritz	Missy Erickson	MO	May 2-4, 2025	188
L'Oreal CPD 2027 Q1	Prestige	Daniele Gal	MO	January 23-29, 2027	2158
Big East Leadership's Off-Site	Maritz	Allison Frey	NJ	April 6-10, 2025	53
L'Oreal CPD 2026, Q1	Prestige Global Meetings	Daniele Gal	MO	January 24-30, 2026	2158
Repatha Level Up Special Incentives	Maritz	Sherry Jones	IN	May 27- June 1, 2025	45
Crawford Contractor Association - Top Performer Spring 2026	NHS Global Accounts	Bryan Ganek	IL	February 17-22, 2026	363
Butler Manufacturing 2026 Next	Maritz	Lisa Hart	MO	February 27-March 7, 2026	3500
RGM Fest	HelmsBriscoe	Amelia Roper	IL	March 31-April 4, 2025	80
April GAF Executive Retreat	ConferenceDirect	Nicki Furik Mullin	NJ	April 7-9, 2025	40
Enterprise Holding Inc 2025 Incentive Trip	Maritz Global Events	Lisa Bell	MO	November 15-18, 2025	635
Foley & Lardner Partner Retreat	Maritz Global Events	Jeannette Cherry	MO	April 24-26, 2025	1690
Enterprise Holding Inc 2025 Incentive Trip	Maritz Global Events	Lisa Bell	MO	November 12-18, 2026	635

Law Firm Partner Meeting	ConferenceDirect	Jeff Smigelski	OH	October 4-10, 2026	1095
Herzog Foundation Coaches Gathering 2025	HelmsBriscoe	Julie Hielbrink	MO	December 6-9, 2025	260
ECommerce Planning Meeting	ConferenceDirect	Lisa Neylon	IL	March 3-6, 2025	51
BD Canada NSM 2025	SDI Meetings and incentives	Lindsay Tanquary	ON	November 24-27, 2025	475
Nissan Aftersales Incentive Feb 2026	Maritz Global Events	Jeannette Cherry	MO	January 29-February 5, 2026	547
McDonald Hopkins 2027 Retreat	Meetings Made Easy	Mike Ferreira	MI	April 8-11, 2027	300
2026 ESICA Board Meeting	**HelmsBriscoe**	**Tanya Baker**	**OH**	**February 4-8, 2026**	**68**
CCCI - CRU Destino Winter Conference, MLK 2026	Arrowhead Conferences	Beth Piatt	IN	January 14-18, 2026	318

***New definites in Red**

Prospecting and Other Activities

- Contacted all incoming leads for updates and recommendations. Followed up with open leads
- Barb attended and presented at SITE Chicago AGM (140pp) with a focus on a sponsorship for Naples Marco Island CVB
- Barb attended (2) SITE Board Meetings and (2) SITE Committee meetings
- January 13 - 15, 2025 - KANDA Travel Advisor Virtual Tradeshow. Maura and Melissa attended
- January 30-31, 2025 - Maura attended Retreats Resources Roadshow (Orlando, Tampa)

Looking Forward (Trade Shows)

- **February 11:** American Hospital Association/CVB Partner Meeting
- **February 12:** SITE FL Theater Night Client Event, Tampa
- **February 20:** Synergy Client Event San Francisco
- **February 20:** SITE Chicago CSR Event
- **February 25:** GPS Global Events Minneapolis
- **February 26:** GPS Global Events Chicago
- **February 27:** GPS Global Events Milwaukee
- **March 3-6:** SITE Global Conference, Tulum
- **March 12:** SITE Chicago's Michigan Networking - Grand Rapids, MI
- **March 24-27:** M&I Events, Canada

SPECIALTY MARKETS SALES
Michelle Pirre, Sales Assistant
Reporting Period: January 1-31, 2025

Key Takeaways

	2025	**2024**
Number of Travel Agent & Tour Ops Contacts	11	1285
Number of Meeting Planners	269	157
Number of RFP's Sent	8 Leads sent with estimated $404,508.92 EIC Potential with 499 room nights	5 Leads Sent with $202,354.14 EIC Potential 153total room nights
Number of Consumers	129	1252

January Events Specialty Markets

- **January 6-8:** Exhibited at RCMA Emerge! A tradeshow for meeting planners with focus on religious meetings and events.
- **January 13:** Big Rocks meeting with CVB staff.
- **January 13:** Tempest meeting with CVB Staff and team with iDSS our CRM system to be sure we are using the database and all of its capabilities.
- **January 21:** Zoom meeting with TravPro team to review our travel agent training course and updates.
- **January 27-28:** Exhibited at NY travel & Adventure Show.

RCMA continues to produce events for the destination. As a direct result of our participation at RCMA Emerge! we have already received two small RFPs, representing a potential $26,549.28 in Estimated Impact Contribution (EIC) and 241 possible room nights. Additionally, a sponsorship opportunity emerged for the CVB along with one of our resorts to host an Advisory Council Meeting for a major planner organization that was in attendance as well. This council plays a crucial role in shaping future events and carries a significant economic impact, generating approximately $14.7 million in hotel sales and a total economic impact of $112.5 million (including direct, indirect, and induced spending) for the host city. Our presence at RCMA Emerge has already proven valuable, and we look forward to converting these leads into confirmed business for the destination.

At the NY Travel & Adventure Show, we had hundreds of attendees come to the Florida row. We had 129 consumers sign up for our newsletter along with 11 travel agents, and 6 agents specializing in destination weddings and honeymoons. While the show overall saw strong attendance, we noticed a trend of Florida Fatigue among visitors in our section.

More exotic destinations drew larger crowds, making it evident that travelers were seeking more far-flung adventures. Compared to previous years, interest in Florida appeared to be slower.

Upcoming Initiatives
To maximize the impact of recent industry events, we will continue proactive follow-up with the planners and travel agents we engaged with at RCMA Emerge! and the NY Travel & Adventure Show.

This follow-up will focus on nurturing relationships, providing tailored destination insights, and advancing discussions on potential bookings for religious meetings, group travel, and destination weddings.

In response to observed Florida Fatigue at the NY Travel & Adventure Show, we recognize the need for strategic sponsorships and enhanced engagement tactics to differentiate Florida's Paradise Coast from competing destinations. Sponsorships will allow us to secure prime visibility, exclusive networking opportunities, and curated brand positioning, ensuring a stronger presence at future industry events.

To amplify our reach, we are exploring sponsorship opportunities at all of our future key events.

Looking Forward

- Small Market Meetings Summit (Group Travel Family) April 30 - May 1, 2025
- Small & Boutique Meetings - SPRING (NorthStar) June 1-3, 2025
- Going on Faith (Group Travel Family) August 6-8, 2025
- Connect Specialty August 25-27, 2025

PUBLIC RELATIONS & COMMUNICATIONS

Sandra Rios, PR & Communications Manager/Maria Power, PR Assistant
Reporting Period: January 1-31, 2025

Media Updates

- Hosted Victor Block and Fyllis Hockman, a husband-and-wife team of travel journalists who write for numerous newspaper outlets and website.
- Continued discussions for media visits with journalists:
    - Gwen Pratesi, with *Garden & Gun* for an article on luxury.
    - Eric Barton of *Flamingo Magazine* to cover What's New in Naples.
    - Nick Honachefsky, from *Saltwater Sportsman, Sport Fishing*, and *The Fisherman* for fishing coverage.
    - Carrie Honacker, with *Travel + Leisure* for coverage on Stone Crab season and harvesting.

Communications

- Host Big Rocks, weekly team meeting to review projects and workflow for the upcoming week.
- In person welcome meeting with Commissioner Chris Hall, updates about TDT collections and Tourism Division overview.
- Attend monthly meeting SW Florida Press Club Board of Directors meeting.
- Attend annual Board of Directors meeting for FRLA – Port Charlotte, FL.
- Attend monthly BOD meeting with FRLA.
- Review and distributed December CoastLines.
- Proceeded to Phase 2 of 2025 Visitor Guide project.
- Draft Convention South article for March issue.
- WGN Radio "On the Map" interview with David Plier.
- Participate in statewide DMO meeting.

Marketing

- Weekly call with Paradise Advertising agency to review project timelines and estimates.
- Bi-weekly call with Lou Hammond Group team.
- Completed multiple requests for assets for media and marketing purposes.
- Reviewed / approved marketing campaign collateral and campaign estimates.
- Reviewed RIPE Booking proposal and review and discussion.
- Social Media strategy discussion and review with Paradise Advertising social team.
- Implement Chubb Classic sponsorship elements.
- Review Travel Trade campaign with Paradise Advertising.
- Attend Conservancy of SWFlorida press conference.
- Review of Garden & Gun Magazine 2025 FY events.
- In-person meeting with Director of Communications for PGA / Chubb Classic.
- Developed plan for Granicus website transfer of all business listings and event listings.
- Attended webinar with Travify for creating more appealing itineraries for visiting journalists.
- Developed relationships with Tap 42 and Unidos for FAM dining for journalists and influencers.
- Meeting with FC Naples team to discuss partnership and upcoming opportunities to collaboratively promote the team.
- Final phase of reviews for DISCOVER Airlines promotional campaign.

- Site visit to new Perry Hotel – discussion and property tour.
- Attend Collier County Supervisor Training session.
- Review Granicus website updates and wireframe architecture.
- Attend weekly Collier County PIO call.

News, Articles, Press Releases

- ***Travel + Leisure*** (UVM: 11,872,550) The Perry Hotel's feature article in the titled, "Naples, Florida, Just Got a New Boutique Hotel With 2 Pools and a Rooftop Restaurant — See Inside."
- ***Forbes*** **(UVM: 51,947,650)** "85 Chefs Share Their Restaurant Trend Predictions For 2025." This article quoted *Kayla Pfeiffer, owner of Bicyclette Cookshop in Naples.*
- ***Miami Herald*** (UVM: 10,262,049) journalist Angela Caraway-Carlton keeps sharing the love for our destination and featured The Ritz-Carlton, Naples, and JW Marriott Marco Island in the article, "Looking to celebrate 2025 in style? Ring in the New Year at these over-the-top Florida destinations."
- ***The New York Times*** (UVM: 285,420), Naples is included in the "Mini-Vows" column which highlights brief, charming stories about couples who are getting married or have recently tied the knot. This happy couple's love story includes a memorable visit to Naples, which played a special role in their relationship and resonates with couples seeking meaningful experiences during their travels. The article is titled, "At the End of a Road Trip, a Romantic Detour."
- ***HOLR Magazine*** (UVM: 16,400,000) After hosting Ksenia Edwards in November, we're thrilled to share her newly published article in titled, "Girls Trip Guide to Naples, Florida: Where Luxury and Relaxation Collide."
- ***TravelPulse*** (UVM: 126,086) article titled, "Florida Travel Guide: 2025's Best Destinations, Events, Attractions and More," recommends Everglades National Park and Naples for its golf, tennis and saltwater fishing.
- ***AARP The Girlfriend*** (UVM: 166,254) article titled, "4 Best Places To See Sunsets In America," spotlights Gumbo Limbo at The Ritz-Carlton, Naples.
- ***Southern Living*** (UVM: 18,174,865) article titled, "The 18 Most Beautiful Places In Florida," highlights Everglades National Park.
- ***Travel Dreams Magazine*** (UVM: 1,660) article titled, "New 2025 'Proposals in Paradise Package' at LaPlaya Beach & Golf Resort" features LaPlaya Beach & Golf Resort.

DIGITAL, SOCIAL AND FILM

Buzzy Ford, Film Liaison, Digital & Social Media Coordinator
January 1-31, 2025

NOV SOCIAL MEDIA	2025	2024
LinkedIn	LinkedIn Post Sent: 06 Engagements: 103 Followers Gained: 04 Impressions: 1,029	LinkedIn Post Sent: 4 Engagements: 276 Followers Gained: 09 Impressions: 2,548
Facebook	Facebook Posts Sent: 36 Engagements: 7,905 Link Clicks: 60 New Fans: 2,597 Impressions: 7,367,887	Facebook Posts Sent: 17 Engagements: 69,336 Link Clicks: 35,999 New Fans: 2,108 Impressions: 4,621,357
Instagram	Instagram Media Sent: 55 Engagements: 2,658 Followers Gained: 162 Instagram Impressions: 776,973	Instagram Media Sent: 23 Engagements: 1,693 Followers Gained: 159 Instagram Impressions: 4,224,251
CrowdRiff	3.9k interactions and 23k views	13k interactions and 47k views
ThresHold360	Engagement: 60.53% Google Views: 97,971 Clicks: 2,787	Engagement: 60.53% Google Views: 631,985 Clicks: 85

Tasks

- Continuing the transition of CVB website to the Granicus platform
- Conduct Facebook & Instagram Live broadcast
- Update partner listings & website articles.
- Provide visitor guide request
- Social Media Monitoring / Content Meeting
- Film permitting (Arthrex & Pink Lilly)
- Update website media center with various PR & publication initiatives.
- Generate UGC content
- Gather media assets from various events
- Write monthly Coastline article.
- Generate TDC Monthly Meeting Agenda
- Update the “In the News” section, highlighting various destination coverage.
- Update PR section of the website.

TRAVEL TRADE SALES REPORT
Claudia Wood, Global Sales Manager
Reporting Period: January 1-31, 2025

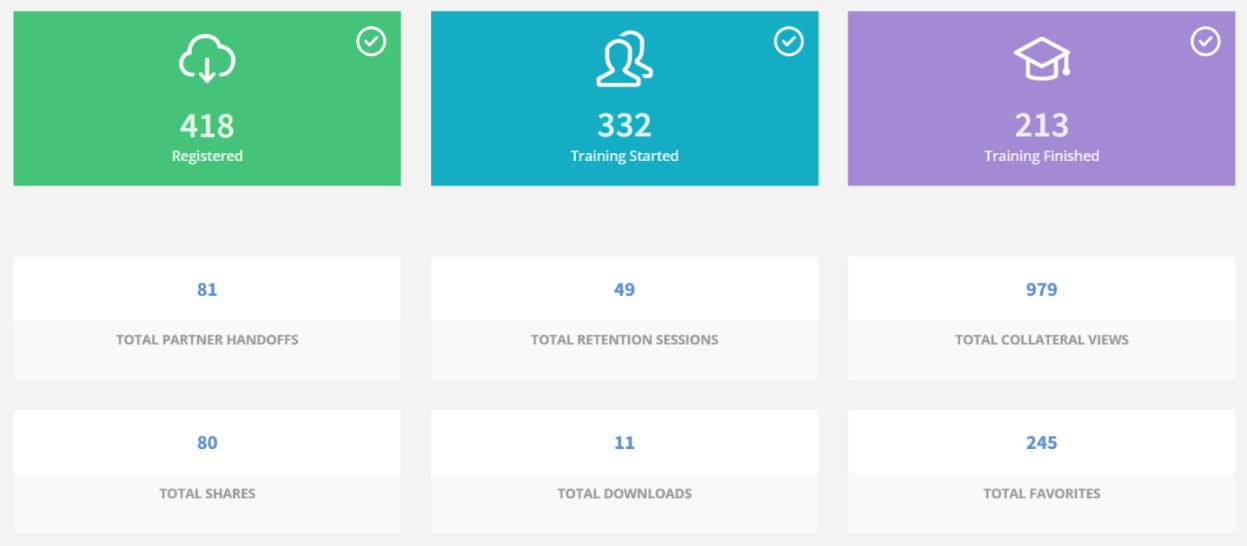
Subject	2025	2024
Number of Contacts	130	40
Number of FAM/Site Visits	0	1
Number of Trade Shows Attended	1	1

Monthly Activities
January 6: Attended Big Rocks weekly meeting.
January 7: International Reps TDC presentation discussion.
January 8: U.S. Travel's 2025 Economic Forecast Webinar.
January 9: Meeting with Synergy Team to welcome the new west coast representative, Melissa Glazier.
January 10: SKAL Audit with Board.
January 10: Site at Great Wolf Lodge with Synergy Team.
January 10: Zoom meeting with Kim Uno, TravPro.
January 13: Attended Big Rocks weekly meeting.
January 14: Diamond monthly activities zoom meeting.
January 14: Coastlines article submitted.
January 15: Zoom meeting with Noble House team to discuss June luxury German tour operator FAM.
January 15: Zoom meeting with Paradise to review Travel Trade Media Plan.
January 17: TDC report completed and submitted.
January 17: Touched base with VF Canada re: upcoming opportunities.
January 17: Meeting with Yosie Crespo at the Naples Perry Hotel to discuss travel trade.
January 21: Attended the monthly TDC meeting.
January 21: Attended webinar: Trump & the Travel Industry (What to Expect in 2025).
January 21: Zoom meeting with TravPro marketing team.
January 23-27: In New York for the New York Travel & Adventure Travel Show.
January 30: Site and dinner with the team at the Perry Hotel.

International Representation
- Ongoing review all activity summaries and approval of projects that are in line with our strategic marketing for the international market.
- ITB appointments confirmed for March. Co-sponsoring a Discover Dinner with Lee County and LCPA.
- International representation contracts (Uk and Germany) renewal approved at TDC meeting. Prepared executive summaries for BCC meeting February 11.

Upcoming Strategic Initiatives
- Destinations International CDME Austin, TX.
- Ladies Power Luncheon Sponsorship
- VF/Travel Market Report Webinar presentation

Florida's Paradise Coast Pro
Stats through January 31, 2025



UK & IRELAND MONTHLY REPORT
OMMAC Activities
Reporting Period: January 1-31, 2025

UK and Ireland Market Update

- UK consumer confidence fell sharply in January due to a rise in government borrowing costs, warnings of job cuts and planned increases in national insurance.
- The Bank of England is expected to cut interest rates from 4.75% to 4.5% on 6 February to support households and businesses.
- UK and European industry continue monitoring the new United States administration, in light of imposed tariffs. Travel industry, however, not impacted – see below under Trade Overview.
- Chancellor of the Exchequer Rachel Reeves delivered a major speech on the economy, emphasising that economic growth is more important than the government's net zero goal. Reeves also announced support for the expansion of London's Heathrow with a third runway.

Marketing, Sales, and Promotional Activity

Trade Overview

- The UK travel industry remains optimistic for 2025, despite global challenges with a notable rise in demand for long-haul and luxury travel, attributed to consumers prioritising travel spending.
- RSM UK's latest Consumer Outlook survey showed that 41% of consumers plan to take an overseas holiday of at least five days in 2025, up from 35% last year. This was attributed to a desire for sunshine following poor weather in 2024 and easing financial pressures.
- There has been a shift in the booking curve with tour operators like Trailfinders reporting strong numbers in September in addition to the usual January peak.
- Recent analyses suggest that the new US administration has had minimal impact on UK travel to the U.S. but this is continuing to be monitored. Industry leaders, however, advise caution regarding potential economic factors like tariffs, high ground costs and exchange rates, which could influence travel costs.
- As of 1 January, the UK has implemented a mandate requiring that at least 2% of aviation fuel used by airlines be sustainable aviation fuel, aiming to reduce the environmental impact of air travel and promote the adoption of greener technologies.

Trade Activity

- Visit USA UK - Meet the Media event in London - attended and participated at this successful event. With an estimated 68 leading media in attendance providing an opportunity to pitch Florida's Paradise Coast stories.
- Aer Lingus trade & trade media Sales Mission/Roadshow – 17-21 February, covering four cities in Ireland. This is a USA event and destinations are selected by the airline, we are one of 26 destinations participating. Final preparations to participate ensuring assets are delivered checking on literature and give a ways.
- Tour America, Ireland – confirmed participation with their luxury co-op activity and possible additional activity for early in year.
- Providing additional data and information to CVB regarding yearend reporting and contract requirements.
- Working with Lusso, upscale UK tour operator with fam into Florida's Paradise Coast, over two days 7 and 8 March for two agents.

- Ongoing follow up with a number of tour operators post co-op activity and opportunities for this year.
- Researching possible opportunity to host selected high end tour operators fam into the destination pre IPW.
- Updating memberships for 2025 – Visit USA France and IAGTO (International Golf Association.
- In discussion with Visit Florida regarding media opportunities.
- Updates – industry updates included within our CVB weekly zoom meeting for planning.
- Mailing House – maintaining the distribution of CVB literature for consumer and trade requests.

Public Relations and Communications Activity

- Key trends this month included 2025 travel highlights, winter holidays and winter sun getaways.
- Six (6) media pitches were distributed, themed around family & luxury travel, and Valentine's Day.
- The team met with three (3) media this month including editors from The London Standard, Daily Mail, as well as freelance journalist Karen Edwards.

Date	Publication	Media Type	Journalist	Headline	Reach	EAV ($)
08.01.25	FabUK	Online	Cem Kaplan	Recharge in Paradise: The holiday after the holiday in Florida's Paradise Coast	63,000	$1,260
15.01.25	FabUK	Online	Cem Kaplan	A cosmic spectacle: where to catch the 2025 planet parade	63,000	$530
18.01.25	The Scottish Sun	Print	Heather Lowrie	Recharge in Paradise: The holiday after the holiday in Florida's Paradise Coast	173,507	$2,339
29.01.25	TTG	Online	Katherine Masters	New If Only package pairs Orlando with Florida's Paradise Coast	76,400	$1,925
				TOTAL (4)	**375,907**	**$6,054**

Attending Visit USA UK Meet the Media Event



L-R Kim Chan, CVB and Cassam Looch, Content Director, Culture Trip

DACH & BeNeLux Markets
Monthly Sales & Marketing Activities
DiaMonde e.K., Annette Eckhardt, Account Director
Reporting Period: January 1-31, 2025

February Forecast

- Final preparations for ITB 2025 incl. Visit Florida Pan Am Lounge Event, Visit USA Media breakfast and Discover Airlines dinner in Berlin from Mar. 3-6
- Visit USA Committee Germany and Switzerland meeting on Feb 12. & Feb 19
- Participation with brochure distribution at German travel consumer show "f.r.e.e." in Munich from Feb. 22-26
- Personal sales calls & training on Feb. 13

Summary of Achievements

- Finalized our room night report FY 2024 with a phenomenal increase of +46% (FY 23 vs. FY 24)
- Successful follow-up postal mailing for our December fam tour group including Naples, Marco Island & Everglades photo book – please see sample in the addendum.
- Final approvals for marketing campaigns with tour operators CRD Select, ARGUS Reisen and TourConsult
- Confirmation of our marketing campaign with German US specialized tour operator TourConsult
- Execution for our attendance with brochure distribution at Dutch travel show "Vakantiebeurs"
- Securing of a site visit to Naples/Marco Island of Swiss tour operator KUONI from Jun. 17-20 with 2 overnights in destination for 2 senior sales staff members
- Securing of the participation of LaPlaya/Inn of 5th to host our planned luxury fam (max. 6 pax) later in 2025

Sales Activities – B2B & B2C

- **tourisme pout tous, MTCH SA, Fredric Norberg, Product Manager USA & Canada, Switzerland**
    - We received a fam tour request from our Swiss tour operator partners "Tourisme pour tous" who are part of the MTCH (Hotelplan) Group and they are active in the French-speaking part of Switzerland.
    - Fredric, the Product Manager contacted us as they are planning a travel agent fam tour to Florida in October 2025. They would like to include Naples with one or two nights. They need 5 doubles and 2 singles (for the escorts). Dates are not finalized yet. After checking with Claudia Wood, we reached out to Liz Morris @Compass Hotel Naples who confirmed on Jan 14th to support this trip w. comp. rooms

- **CANUSA TOURISTIK GmbH & Co. KG, Karin Buhse, Product Manager FL, Germany**
    - Spoke to Karin and she informed us that CANUSA broke their record for the best-selling month in the company´s history from last January. This year Kolja is attending Florida Huddle on behalf of CANUSA. The business to Naples and Marco Island is further solid and on the January 2024 level. They hope to continue to positive trend towards 2025. We have set up an appointment for ITB with her.

Marketing Activities

- **Argus Reisen, Dirk Büttner, CEO, Germany**

- Approved the content for our upcoming B2C/B2B marketing campaign in cooperation w. Claudia Wood.
- The newsletter was sent out on January 19th. Please see the copy in the addendum.

- **CRD Touristik, Nora Kutsche, Marketing Manager, Germany**
  - Approved the content for 1/2-page advertorial at Merkur Tageszeitung, Pub. Date Feb. 15 after receiving the approval of Claudia Wood on Jan 21

- **TourConsult International, Andreas Fraissl, Owner, Germany**
  - As the Keys were unable to proceed with a decision on the campaign, Andreas has proposed a standalone Paradise Coast marketing package. This includes a new 10-day travel package centered on Naples, Marco Island, and the Everglades, specifically designed for upscale travelers, food enthusiasts, and nature lovers. Given the strong demand for Florida at TourConsult, we aim to launch these activities on a last-minute basis in Q1 2025. Cost share is USD 3,500. We confirmed the opportunity on Jan 11 after receiving the approval of Claudia Wood. The new 10 day travel package was published a few days later and can be reviewed below link: https://tourconsult.com/reise/10-tage-naples-top-hotel-delfine-mangroven-und-traumstraende/

Media / PR / Communications Activities

- **Svenja Borberg, Germany**
  - Followed up on the meeting at Visit USA Media Event in Dec 2024. Svenja is a German travel blogger and looking for a Florida cooperation partners as she is planning a travel blog on Florida in late 2025. Her readers are best-agers, nature lovers and foodies. St. Pete/Tampa/Florida Keys are interested in a cooperation with her as well. She travels with her photographer and flights are paid on their own. We asked her to fill out our media form and we will proceed with further planning at the end of March 2025.

- **Meehrerleben, Der Familien-Reiseblog, Antje Gerstenecker, Blogger, Germany**
  - Follow up with Antje regarding the results of her latest trip to Naples. The update of her Naples, Marco Islands and Everglades blog was released on Jan 9th. Please review it under below link **Florida: Tipps für Naples und Marco Island** and in the addendum.

- Paradise Coast has been allocated a series of **social media posts**: 6x German Paradise Coast B2C Page (16 k followers). Overall reach for January 2025 is 8,223 (+226,6% compared to Dec. 2024). Please see screenshots of the posts in the clipping report.

Addendum

- DiaMonde Clipping Report January 2025

MINUTES OF THE COLLIER COUNTY
TOURIST DEVELOPMENT COUNCIL MEETING
BOARD OF COUNTY COMMISSION CHAMBERS
Naples, FL – Feb. 18, 2025

LET IT BE REMEMBERED the Collier County Tourist Development Council, in and for the County of Collier, having conducted business herein, met on this date 9:00 a.m. in REGULAR SESSION at 33299 Tamiami Trail East, 3rd floor, Naples, FL 34112 with the following members present:

Commissioner Chris Hall, Chair
Clark Hill, Vice Chair
City Council Member Darrin Palumbo
Susan Becker
Laura Radler (excused)
Nancy Kerns
City Council Member Michael McComas
Council Member Bill Kramer (excused)
Edward (Ski) Olesky (absent)

ALSO PRESENT:
Jay Tusa, CVB, Tourism Director
Sandra Rios, CVB, PR and Communications Manager
Colleen Greene, Collier County Attorney Office, Managing Assistant County Attorney
Buzzy Ford, CVB, Digital and Social Media Coordinator
Andy Miller, Collier County, Coastal Zone Manager
Amanda Townsend, Collier County, Museum Director
Erin Murphy, Lou Hammond Group, Account Supervisor, via ZOOM
Kristen Murphy, Paradise Advertising, VP Client Services & Partner Development
Leroy Bridges, ADARA, Senior Vice President of Sales
Joseph St. Germain, Downs & St. Germain, President via ZOOM
Enriqueta Balandra, Miles Partnership, Account Manager via ZOOM

Any person who decides to appeal a decision of the Tourist Development Council will need a record of the proceedings pertaining thereto, and therefore may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based, Neither Collier County nor the Tourist Development Council shall be responsible for providing this record.

1. **CALL TO ORDER**
2. **PLEDGE OF ALLEGIANCE**
3. **ROLL CALL**

4. APPROVAL OF TODAY'S AGENDA

Clark Hill motioned to approve the Agenda
Susan Becker seconded
Motion passed unanimously 6-0

4a. APPROVAL OF MINUTES JAN. 21, 2025, MEETING

Susan Becker motioned to approve the Minutes
Nancy Kerns seconded
Motion passed unanimously 6-0

5. TOURISM DIRECTOR REPORT

Jay Tusa, CVB, Tourism Director

- TDT collection for December was $3,465,278, resulting in a year-to-date total of $5,602,840. This is 4.5% down from FY 2024.
- December Visitor Numbers: Occupancy increased 4.4% year over year to 66.9%. The Average Daily Rate decreased 0.9% year over year, resulting in a revenue per available room of $234.14.
- Direct spending by visitors and total economic impact of tourism rose by 6.3% and 5.8% respectively.
- The total number of visitors increased by 5.1% compared to December of 2023 with visitors with 259,900 visitors. Visitors that stayed in hotels and resorts increased to 34% compared to 29% during the first quarter of 2023.
- International visitation is up 14% for the first quarter of the year with Canada showing an increase of 21.9% increase in Germany showing a 38.7% increase in the number of visitors for the year.
- The Board of County Commissioners at their February 11th meeting approved the two contracts for our international rep. firms for the UK and Germany.
- The Tourism Department recently moved under the direction of John Mullins, Division Director for Communications, Government and Public Affairs for Collier County Government. The department was previously under Dan Rodriguez and have been transitioning with his retirement.
- The 2 studies on Paradise Coast Sports Complex and Sun and Fun Lagoon are forthcoming. Sun and Fun in the next weeks and Paradise Coast Sports Complex in a couple of months.
- The Paradise Sports Complex is transitioning from the Tourism Department to Parks and Recreation.

6. CONSENT AGENDA

None

7. NEW BUSINESS

Andy Miller, Collier County, Coastal Zone Manager

A. Recommendation to approve Change Order No. 2 for contract No. 24-8292 with Earth Tech Enterprises, Inc., for the Park Shore Beach Renourishment, increasing the contract amount by $2,739,153, applying the Allowance of $254,000 and adding 30 days to the contract time; approve necessary budget amendments; and make a finding that this item promotes tourism (Project 50320 & 90067).

Item C. Recommendation to approve Change Order No. 1, adding $33,702.40 and 137 days to the Work Order under library contract 18-7432-CZ with APTIM Environmental & Infrastructure, LLC for the Park Shore Beach Renourishment; and make a finding that this item promotes tourism (Project 50320 & 90067).

- The survey on the Park Shore renourishment indicated that the Engineer's time and quantity of sand needed adjustment to fill the design template because of the Hurricanes. The change order for Earth Tech, the contractor, needed almost double the amount of sand and the Engineer needs to stay on board doubling the amount of time.
- The first recommendation is for the contractor and it's a recommendation to approve change order number two for the contract number 24-82 92 with Earth Tech Enterprises for Park Shore Beach renourishment and increasing the contract amount by $2,739,153, applying the allowance of $254,000 and adding 30 days to the contract time, approve the necessary budget amendment and make a finding that this item promotes tourism.

Chairman Hall moved to approve 7a and 7c
Darrin Palumbo seconded
Motion passed unanimously 6-0

B. **Recommendation to award Invitation to Bid ("ITB") No. 24-8323, in the amount of $1,178,500, to Earth Tech Enterprises, Inc., for the Collier County South Naples Emergency Berm truck haul & construction project, approve all necessary budget amendments, authorize the Chairman to sign the attached Agreement, and make a finding that this item promotes tourism. (Project 50280)**

- This for the last leg of the emergency berm. The project that was 400,000 tons of what we call the emergency berm, which is essentially rebuilding the berms that were destroyed by Hurricane Ian. And when we got to the final leg of the project, which was Port Royal, South Naples, we didn't have all the easements required to do the project for right of access.
- Since it was occurring in the heat of sea turtle nesting season, we told the contractor to stop. We did a separate bid because so much time had expired between the original stop work and start construction that we had to rebid the item.

Susan Becker moved to approve
Nancy Kerns seconded
Motion passed unanimously 6-0

8. OLD BUSINESS

8. A Recommendation to accept the report from the City of Naples Tourism Impact Study for the Stormwater Outfall Pipe Removal and Water Quality Project and make a finding that this project promotes tourism.

Bob Middleton, Public Works Director, City of Naples

- Those are 10 stormwater outfall projects that this project will remove. Eight of them are owned by the City, the other two will be removed as part of future development as these areas develop.
- The area we're looking at is Gulf Shore Boulevard between Second Avenue South and Oleander, which is just north of the current Beach Club project. It will also include a section along Third Street.
- Our current project is a gravity flow system. As storm water is collected off the streets and the properties in this area, it flows to the gulf through these outfalls by gravity. The problem with that is, is not as efficient during high tides during a period of high tide, they drain slower.
- The main design of this project is to construct two outfall pump stations, one at 8th Avenue North, and one at 3rd Avenue North. All that water would be collected and diverted to those pump stations. And instead of having the outfall gravity outfall pipes that discharge into the Gulf, there would be two outfall pipes.
- One from each pump station that will discharge 1500 feet out into the Gulf of Mexico. There'll be diffuser systems on both of those pipes to allow the water to be diffused over a large area, which is preferred by the Army Corps of Engineer and DEP, along with the improvements that we will be adding storm water in the boxes 78 to be exact. And those will include water quality features that will remove a particular matter that will reduce the nitrogen and nutrients from the, from the collected water before it's discharged into the Gulf of Mexico.
- It was determined that by improving water quality and flood protection will also increase foot traffic along Gulf Shore Blvd. and increase the resiliency. It will also increase the road elevation between 6" and 12".
- The removal of outfall projects, that's gonna be the big one to remove the outfalls. It'll be more attractive, more aesthetically pleasing to the residents that tour the beach.

Chairman Hall motioned to approve
Susan Becker seconded
Motion passed unanimously 5-1; **Michael McComas** opposed

9. BREAK

No break was taken

10. PRESENTATIONS

A. Downs & St. Germain

Joseph St. Germain, Downs & St. Germain, President **via ZOOM**

- The visitor metrics, with the exception of the average daily rate for December, were up year over year. The number of days in market was the biggest increase because the length of stay of the typical visitor in December was longer than the previous year. Overall direct spending of visitors to the area was over 260 million resulting of an economic impact of nearly 360 million.
- Occupancy was up even with more units available. That's why the room nights are up more than the occupancy. I know this is something that we wanted to point out because it's still one of our concerns. We have so many more hotels online. So, how do we increase occupancy when you have more units available. So that was good to see.
- Overall, the biggest increases year over year were sports related.

- First time visitation was down slightly.
- Slight decrease in people that would definitely recommend the area which is hard to keep high when your average daily rate is $350.00. That comes with a high level of expectation.

B. Paradise Advertising

Leroy Bridges, ADARA, Sr. VP of Sales

- We report on the tax collections, on who's coming, where they're coming from, on the attribution from the various media channels and partners.
- ADARA is a global entity, working and representing with hundreds of destinations. I'm a Floridian and my roots are in tourism marketing with the county government entity. I've been at ARA for a little over three and a half years, but presented to Council, similar to this for many years.
- We bring global consumer travel data together into one place to allow destinations to understand their marketing performance. We can't do what we do without withholding a very high privacy standard that is GDPR compliant, which is the highest level of, of privacy in the world.
- We bring all of this data together into one place to help understand that consumer and then provide measurable results on the other side. Literally, any traveler goes to a particular data partner site like Kayak, Marriott, Wyndham, any of these large groups and every brand that sits under those groups makes a search. We then see that data in real time.

Kristin Murphy, Paradise Advertising, VP Partner Development and Client Services

- We delivered ads during the disaster recovery campaign, that was about nine weeks long. December 9th through January 31st. This was the part of the additional funding that the TDC and the Board of County Commissioners approved for about $350,000 to remarket after the Hurricanes and help mitigate that impact.
- There are six media vendors that made up our plan based on the day that this report was generated. The ADARA impact shows $970,000 in hotel revenue.
- We are looking at providing a return on ad spend that's directly attributed to the ads and these are just the digital ads.
- Expedia also guaranteed transactions after exposure to the ads. You are looking at a total revenue of $9,257,611 with a spend of $335,000 on advertising. That's a $28 to 1 return on ad spend that is observed data, direct transactions that we can guarantee happened. But keep in mind how much bigger that number really is when you think about what's not tracked. We are very pleased with this campaign result.
- I want to commend Sandra and John for their strategy and collaborative support.

11. AGENCY PARTNER REPORTS

Lou Hammond Group, PR Agency

Erin Murphy via ZOOM

- In December, the media impressions were 52,550,055 which translated to a media value of $91,495.38.
- This is equating this to advertising what you would've spent for these placements that are earned for free because it is a value for both the publication and the destination.
- An example of a couple of the placements that we had beginning with Forbes. There are nine hotel packages “We wish we got for Christmas” and “On Fifth” is included with several direct

links to both the Forbes travel guide reviews and their guides, but also to the website itself to book that special offer Southern Living.

- We always love working with Miami Herald. This was published at the beginning of December, and it highlights the Ritz-Carlton and the JW Marriott, Marco Island.

Miles Partnership

Enriqueta Balandra, Miles Partnership, Account Manager, via ZOOM

- Over 140,000 website sessions and over 67,000 engaged sessions. We had increases in the 50% plus, month over month, which is following our historical trend.
- Our top pages across the traffic types; homepage coming in at number one, followed by beaches, events, arts and culture and holiday events in our top five. We also had the Snow Fest event page in there for the holidays in December.

Amanda Townsend, Museum Director

- At the Collier county Museum at Government Center we have the art of Phil Fisher. Phil's been painting in Naples for 53 years. We have several of his works in the museum collection, so we're really happy to feature his works. He has about 35 new paintings on display as well as some of the pieces that are in the museum collection.
- Our second Tuesday, April lecture, I'll be doing a deep dive into artifact spotlight, if you will, into his painting of Jim McMullen's Paint Panther Tracker, which is a painting that is in the museum collection.
- Roberts Ranch in connection with the upcoming cattle drive perspectives from Southwest Florida Ranch Life, Megan Watkins is a rancher and works and lives the life every day and is a photographer as well. The cattle drive is March 8th, and we are looking forward to another fun day that you just don't get to see very often anymore. We will bunch as many original Florida and illusionary oriented cattle that we can get our hands on, and we'll bring them to the rodeo grounds and march them up Main Street onto Roberts Avenue and onto Roberts property.
- Kaleidoscope Beer Company is brewing an orange blossom special beer and we'll be having a release of on Saturday. They will be donating a portion of the proceeds from every pint sold to the Friends of the Collier County Museum to benefit the Depot.

12. TOURISM STAFF REPORTS

13. COUNCIL MEMBER DISCUSSION

Chairman Hall

I encourage anyone with an opposing view to share it so we can all work together. So with the nay vote today, I wanted to hear why.

Michael McComas

It sounds like that project is a project, let me put it to you this way. I flood in Everglades City almost on a regular basis. And when these dollars go into a project, which I look at as being part of the City Council's responsibility out of their tax base, not sort of the general public's tax base, then I have concerns that we're walking into an area that I don't want to be in.

I don't think that when the State allocated these funds and to find the use of them, I mean we put the tagline for that it promotes tourism on everything we ever see. It sort of loses some meaning somewhere along the line. But to your point, that was the reason for the nay vote.

14. NEXT MEETING

March 18, 2025

15. ADJOURNED

There being no further business for the good of The County, the Tourist Development Council meeting was adjourned at 10:43 a.m.

COLLIER COUNTY

TOURIST DEVELOPMENT COUNCIL

The Minutes were approved by Chris Hall

Chairman Chris Hall

On date 3-18-25

as presented Y **or amended** _____

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

January 30, 2025

FOR IMMEDIATE RELEASE

Notice of Public Hybrid Remote Meeting
Vanderbilt Beach Beautification MSTU Advisory Committee
Collier County, Florida

February 6, 2025
2:00 p.m.

Notice is hereby given that the **Vanderbilt Beach Beautification Municipal Service Taxing Unit (MSTU) Advisory Committee** will meet on **Thursday, February 6,** at **2:00 p.m.** This will be a Hybrid Remote meeting and it will be held at the Cocohatchee River Marina, 13535 Vanderbilt Drive, Naples, FL 34110. Some of the Board Members may be appearing remotely, with staff present in person. The public may attend either remotely or in person.

Individuals who would like to participate remotely should contact Rosio Garcia at Rosio.Garcia@colliercountyfl.gov by noon on February 6.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

The agenda will be available on the Collier County Government website at https://www.collierptne.com/mtsu/vanderbilt-beach-beautification-mstu-advisory-committee/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as

possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Judy Sizensky at (239) 252-4980.

###

Vanderbilt Beach M.S.T.U.

Advisory Committee
8300 Radio Road
Naples, FL 34104

FEBRUARY 6, 2025, 2:00 PM
Committee Members and Project Manager will meet at
Cocohatchee River Marina-13535 Vanderbilt Drive, Naples, FL 34110
All others are encouraged to attend via Zoom video conference

AGENDA

I. Call to order and Pledge of Allegiance

II. Attendance

Advisory Committee	Bruce Forman - Chairman	(11/13/2027)
	Bill Sjostrom - Vice Chairman	(11/13/2028)
	Mark Weber	(11/15/2025)
	Gabriella R. Miyamoto	(11/13/2027)
	William Harris	(11/13/2028)
	Aaron Gross, Ground Zero Landscaping	
	Judy Sizensky– Project Manager	
	Rosio Garcia – Operations Coordinator	
	Wendy Warren- Transcriptionist	

III. Approval of the agenda

IV. Approval of the Minutes – January 7, 2025

V. Landscape Maintenance Report - Aaron Gross, Ground Zero Landscaping Services

VI. Vanderbilt Drive Refurbishment Projects– Judy Sizensky

A. Regatta Corner-There are a few punch list items to finish. Once ROW inspection is passed, final payment will be process and the project will be closed out.
B. Crosswalks (6) along VB Dr.- The crosswalk at The Dunes needs asphalt work to be done. Preferred Materials is scheduling that. Once ROW inspection is passed, the final payments will be process and the project closed out.

VII. Project Manager Report – Judy Sizensky

A. Current Budget FY 25 – February 2025
B. The 90% plans are completed for the Greenway Multi-use Bike Path on Vanderbilt Drive the total cost for the project is $347,593.74. RWA is extending the plans ($33K) to incorporate the entire stretch along Vanderbilt Drive for and an additional cost of $347K. The total project is estimated to be $750K for construction.
C. Gulf Shore Drive - RWA submitted a preliminary cost estimate, we will discuss.
D. Capital Construction will redo the sidewalk at Le Dauphin per ROW Inspection notes.
E. Capital Construction submitted for the ROW permit of the decorative fence extension @ Connor Park. The amount is $69,500. Construction should begin soon.
F. The flowers for the butterfly garden are on hold per Parks & Rec while they survey all parks. The amount is $956. The volunteers will plant all materials.

VIII. Old Business

A. Traffic signal relocation @ Vanderbilt Beach Rd & Vanderbilt Drive-Engineer has been assigned. It is DRMP, Inc, which we used on Crosswalks project. They are preparing the quote for the plans.

IX. New Business

A. Wiggins Pass-An engineering firm, Cribb Philbeck Weaver Group, has met onsite. They will submit the quote for the plans and construction asap.

B. SCS is on contract for bridges. They will have quotes asap for pressure washing and sealing. They do not recommend painting.

C. Ground Zero to price the clean-up of the area @ 11118 Gulf Shore Drive. The quote for the work is $17,110.

X. Public Comment

XI. Adjourn

NEXT MEETING DATE
MARCH 6, 2025
COCOHATCHEE RIVER MARINA, 13535 VANDERBILT DR, NAPLES, FL 34110

Vanderbilt Beach M.S.T.U

Advisory Committee

8300 Radio Road
Naples, FL 34104

JANUARY 7, 2025

I. CALL TO ORDER AND PLEDGE OF ALLEGIANCE

Chair Forman called the meeting to order at 2:00 P.M. Roll call was taken, and a quorum of three was established. The Pledge of Allegiance was recited.

II. ATTENDANCE

Advisory Committee:	Bruce Forman – Chair
	William Sjostrom – Vice Chair
	Mark Weber (Excused)
	Gabriella R. Miyamoto
	William Arell Harris (Excused)
Staff:	Judy Sizensky - Project Manager
	Brian Wells – Director, PTNE (ZOOM)
	Rosio Garcia – Operations Analyst
	Keyla Castro - Operations Support Specialist
Others:	Aaron Gross – Ground Zero Landscaping
	Wendy Warren - Transcriptionist

III. APPROVAL OF THE AGENDA

Vice Chair Sjostrom moved to approve the Agenda of the Vanderbilt Beach MSTU Advisory Committee as presented. Second by Ms. Miyamoto. Carried unanimously 3 - 0.

IV. APPROVAL OF THE MINUTES – November 7, 2024

Ms. Miyamoto move to approve the minutes of the November 7, 2024, Vanderbilt Beach MSTU meeting as presented. Second by Vice Chair Sjostrom. Carried unanimously 3 – 0.

V. LANDSCAPE MAINTENANCE REPORT – Aaron Gross, Ground Zero Landscaping Services

Mr. Gross reported:

- Vanderbilt Drive landscape refurbishment, west of the sidewalk, is continuing in areas impacted by Hurricane Milton.
- Clusia interspersed with Jatropha trees were planted on the north side of Bluebill Avenue bordering the parking lot.
- The wetland retention area gully, adjacent to the tennis courts, needs to be cleared of debris. The County mowed the side hill.
- Sea Grapes on Conner Park's south property line, fell over the guard rail during Hurricane Milton.

- The plants are too large to stand up. Options are "trunking" or removing the plant.
- Maintenance of the area is not the County's responsibility.

Ms. Sizensky *will walk the area with Mr. Gross to evaluate the options.*

Committee discussion:

- Green utility boxes abandoned by companies no longer providing service in the area should be removed.

VI. VANDERBILT DRIVE REFURBISHMENT – Judy Sizensky

Ms. Sizensky reported:

A. Regatta Corner of Vanderbilt Drive and Vanderbilt Beach Road

- The project, undertaken with Infinite Construction, is near completion.
- Upon completion of punch list items and passage of Right of Way (ROW) inspection, final payment will be processed and the project closed out.
- Retention of a Construction, Engineering & Inspection (CEI) firm was beneficial to the process.

B. Crosswalks (6 with 1 alternate) Along Vanderbilt Beach Drive

Ms. Sizensky reported:

- Preferred Materials was awarded a contract to install six paver crosswalks, three north of The Regatta of Naples and three at the Anchorage at Vanderbilt, The Dunes of Naples and Marina Bay.
- The brick paver installation is complete. Asphalt work must be finalized for one crosswalk at the Chateau Vanderbilt entrance.
- With passage of the ROW inspection, final payments will be processed and the project closed out.

C. Vanderbilt Drive Landscape

Vanderbilt Beach Road to Bluebill Avenue Landscape West Side Vanderbilt Drive

Ms. Sizensky reported that Ground Zero Landscaping has completed the landscape refurbishment.

VII. PROJECT MANAGER REPORT – Judy Sizensky

Ms. Sizensky reported:

A. Budget FY-25

Vanderbilt Beach MSTU Fund 1617 Budget for January 7, 2025, prepared December 26, 2024.

Purchase Orders

1. Collier County Utilities – Water and Sewer.
2. FPL – Electricity.
3. Capital Contractors – Sidewalk and bench refurbishment.
4. DRMP, Inc. – Greenway multi-use pathway.
5. Ground Zero Landscaping –
   - Incidentals are for landscape refurbishment and miscellaneous.
   - Ground Maintenance includes Conner Park and irrigation repairs.
   - Non-Bid Items: Vanderbilt Drive Landscape Refurbishments.

6. Infinite Construction – Renovation of the corner of The Regatta of Naples and Vanderbilt Drive.
7. Preferred Materials – Installation of crosswalks.
8. McGee & Associates – Architectural Landscape services.
9. Premier Staffing – Transcription services.
10. Q Grady Minor & Associates - West Vanderbilt Drive sidewalks.
11. RWA Engineering – Design services for the Greenway multi-use path project.
12. Site One Landscape Supply – Irrigation parts & pumps.

Budget Summary

a. Line 1, Ad Valorem Tax Millage: Of the Millage assessed and to be collected of $1,786,300, $1,443,886 has been collected, leaving an outstanding balance of $342,413.
b. Line 5, Investment Interest: Of the $28,000 budgeted, $15,064 has been credited, leaving a balance of $15,064 to collect.
c. Line 11, Carry Forward – Unexpended prior year funds of $5,052,000.
d. Line 15, Total Revenue - $7,780,367, including investment interest, transfers, and contributions, minus a 5% ($90,800) reserve for estimated uncollected revenue.
e. Line 37, Operating Expense - Of the $6,576,067 budgeted, $1,144,733 is committed to existing Purchase Orders and $240,327 has been spent, leaving a budget remainder of $5,191,807 available within budget for additional operating expenses as needed.
f. Line 39, Capital Outlay - Budgeted at $1,000,000 is for the current fiscal year long term projects, consistent with the MSTU ordinance and upon a motion from the Advisory Committee.
g. Line 40, Transfer to Fund 111 - Of the $102,300 budgeted $0 remains has been transferred (PTNE Staff and Support).
g. Line 44, Transfer Construction – Of the $51,200 Budgeted, $32,749 has been transferred and a balance of $18,450 remains for transfer (Property Appraiser and Tax Collector).
h. Line 46, Capital Reserves - Of the $50,000 budgeted for anticipated Maintenance and Capital projects in future fiscal years as identified in the Asset Management Plan, $0 has been spent and a balance of $50,000 remains.
j. Line 47, Total Budget – Of the $7,789,367, tabulated commitments to existing purchase orders total $1,144,733, $273,076 has been expended leaving a remainder of $6,362,557 for FY-25 MSTU expenditures.

General

a. Available funds are sufficient to satisfy outstanding invoices for the landscaping at the Regatta of Naples at Vanderbilt Beach Road and Vanderbilt Drive, the crosswalks, the Vanderbilt Drive landscape renovation project, the Greenway Multi-Use Path and sidewalk installation on the east side of Vanderbilt Drive.
b. The Ad Valorem property tax value increased 11.17% for fiscal year 2025 over 2024 generating additional revenue of $30,000.
c. Funds not spent in FY-25 (fiscal year 2025) will be carried forward into FY-26.
d. Tax millage collected and interest can only be utilized by the MSTU and within the district boundary.

Millage Rate

The Committee will analyze the Millage Rate for FY-26 with consideration for current and future expenses in the first quarter of 2025. Options are:

- Revenue Neutral: Lower the current millage rate to maintain the FY-25 income level.
- Millage Neutral: Maintain the current millage rate of 0.5000 mills, increasing revenue equal to the Ad Valorem property value increase assessed by the County appraiser.

B. Utilities Project Landscape Refurbishment

Ms. Sizensky reported the Burial Project landscaping restoration at The Dunes of Naples and the Anchorage at Vanderbilt is completed. Sod will be installed at The Dunes.

C. Greenway Multi-Use Bike Path – Vanderbilt Drive – Gulf Shore Drive

Ms. Sizensky reported:

- A 10-foot bike and pedestrian path north of The Dunes of Naples on Vanderbilt Drive near the bridge cannot be navigated at high tide or during extreme rain events.
- RWA Engineering provided an "Engineer's Opinion of Probable Cost" for improvements to the infrastructure of 2075 linear feet of the Vanderbilt Drive sidewalk in the amount of $347,593.74 including engineering services and a 10% contingency. The plans are 90% complete.
- RWA is extending the plans to incorporate the entire stretch of the pathway from The Dunes of Naples to the Anchorage Vanderbilt and Marina Bay.
- RWA's estimated cost for design services and construction for the revised project is $750,000.00.
- The South Florida Water Management District (SFWMD) will be consulted on the project.
- Plans are subject to Road Maintenance approval prior to construction.
- The Road Maintenance Division may consider undertaking construction with costs borne by the MSTU.
- The Road Maintenance Division will be responsible for maintaining the walkway following completion of construction.

***Ms. Sizensky** will present the 30% plans to the Committee at a future meeting.*

D. Gulf Shore Drive Sidewalks

Ms. Sizensky reported RWA Engineering received the work order to design plans to install a new concrete sidewalk and improve drainage on the northeast corner of Gulf Shore Drive and Vanderbilt Beach Road from Buzz's Lighthouse Restaurant to LaPlaya's service building.

She provided details on the work garnered from a November 6, 2024, meeting with the consultant to review the project.

***Ms. Sizensky** will present the 30% engineering plans and an Opinion of Cost to the Committee at a future meeting.*

E. Bench and Sidewalk Project

Ms. Sizensky reported**:**

- The south portion of the new concrete sidewalk between *Le Dauphin* and *La Playa*, constructed by Capital Contractors, did not pass inspection due to paving aggregates surfacing during a rain event post construction.

- The Permitting Department also determined a handrail is required in front of the drain.
- Capital Contractors submitted revised engineering plans addressing the Right-of-Way (ROW) issues sited by the County.
- Construction to remedy the issues will commence soon.

F. Decorative Wall Extension Conner Park

Ms. Sizensky reported:

- A permit to extend the decorative post and rail wall on the south side of the park has been issued.
- The fence will be extended approximately sixty-two feet with columns spaced 15 feet apart.
- A gate to enable maintenance access for the Parks and Recreation Department is incorporated in the design and construction plans.
- The construction contract has been awarded to Capital Contractors, the vendor for the original fence installation, in the amount of $69,500.00.
- Ground Zero Landscaping will locate and "flag" the irrigation system in preparation for construction.
- Ground Zero Landscaping will remove vegetation and mow the grass on the south side of Conner Park in preparation for installation of the new fence at a cost of $1,316.00 if the Parks and Recreation Department fails to prepare the area.

G. Butterfly Garden Restoration

Ms. Sizensky reported:

- Community volunteers will refurbish the original Butterfly Garden.
- Creation of a new garden, east of the tree, will also be undertaken by the resident volunteers.
- The plants for the projects have been ordered at a cost of $958.00 from the MSTU.

VIII. OLD BUSINESS

Ms. Sizensky reported:

A. Traffic Signal Box

- The Committee motioned to approve $100,000.00 to relocate the County's Traffic Signal Box on the northwest corner of Vanderbilt Drive to the Right of Way (ROW) on the south side of Vanderbilt Beach Road.
- A licensed engineer on contract with the County, DRMP, Inc., has been assigned to submit a cost proposal for relocation of the box and prepare the plans.
- The project is contingent upon approval of the Traffic Operations Division.
- DRMP, Inc. would perform the work and invoice the MSTU for the expense.
- Relocation of the box will improve the appearance of the landscaped areas at The Regatta Vanderbilt Beach.

IX. NEW BUSINESS

Ms. Sizensky reported:

A. Wiggins Pass Entrance Beautification

- Cribb, Philbeck & Weaver Group has been assigned to present plans accompanied by a quote proposal to reconfigure the turn-around section at the entrance to Delnor-Wiggins Pass State Park.
- She will meet with them to review the project on January 9, 2025.

- MSTU participation in cost sharing the project will be at the discretion of the Committee.
- A Memorandum of Understanding for the Program (MOA) will be written.

B. Bluebill Avenue Bridge Cleaning

- SCS will provide quotes to pressure wash and seal the Bluebill Avenue Bridge including removal of peeling paint from the "pile ons."
- SCS will submit separate quotes for condition restoration of all bridges within the MSTU boundaries.

C. Beautification 11118 Gulf Shore Drive Area

- The County noted it is not responsible for maintenance of the area.
- Aaron Gross, Ground Zero Landscaping, and Request a Quote (RFQ) to clean up the area.

D. Solar Lights on Vanderbilt Drive

- Solar spotlights to enhance landscaping on Vanderbilt Drive will be considered. Property owners will be consulted if the light installation borders their residence.

X. COMMITTEE COMMENTS

Future improvements to the Vanderbilt Beach MSTU for Committee consideration include:

Vanderbilt Drive North
Ms. Sizensky will consult with RWA Engineering on opportunities to improve drainage and beautify Vanderbilt Drive around the Anchorage, The Dunes of Naples and Marina Bay.

The Halas and Blue Bill Bridges
Opportunities to enhance landscaping in the vicinity and entrances to the bridges will be researched.

Gulf Shore Drive Sidewalks
Contributions to sidewalk improvements will be considered.

XII. ADJOURN

There being no further business for the good of the County, the meeting was adjourned by the Chair at 3:03 P.M.

VANDERBILT BEACH M.S.T.U. ADVISORY COMMITTEE

_____

Bruce Forman, Chair

The minutes approved by the Board/Committee on_____,2025 "*as submitted*" [___] or "*as amended*" [___].

NEXT MEETING FEBRUARY 6, 2025 - 2:00 P.M.
Cocohatchee River Marina
13535 Vanderbilt Drive
Naples, Florida

VANDERBILT MSTU
FUND 161700000
February 7, 2025
FY25

		Vendor	Item	PO#	Budget	Commitments	Expenditures	Total
1	CUR AD VALOREM TAX				$ (1,786,300.00)	$ -	$ (1,495,324.59)	$ (290,975.41)
2	DEL AD VALOREM				$ -	$ -	$ -	$ -
3	STATE REVENUE						$ -	$ 64,023.57
4	OVERNIGHT INTEREST				$ -	$ -	$ (32,995.51)	$ 32,995.51
5	INVESTMENT INTEREST				$ (28,000.00)	$ -	$ (23,035.59)	$ (4,964.41)
6	INTEREST TAX COLL.				$ -	$ -	$ (1,285.51)	$ 1,285.51
7	**REVENUE STRUCTURE**				**$ (1,814,300.00)**	**$ -**	**$ (1,552,641.20)**	**$ (261,658.80)**
8	TRANSFERS FROM PROP APP				$ -	$ -	$ -	
9	TRANSFERS FROM TAX COLL				$ -	$ -	$ -	
10	REIMBURSEMENT -INTERDEPT.				$ -	$ -	$ -	$ -
11	CARRY FORWARD GENERAL				$ (5,052,000.00)	$ -	$ -	$ (5,052,000.00)
12	CARRY FOR OF ENCUMB AMT				$ (1,004,867.28)	$ -	$ -	$ (1,004,867.28)
13	NEG 5% EST REV				$ 90,800.00	$ -	$ -	$ 90,800.00
14	**TRANSFERS & CONTRIB**				**$ (5,966,067.28)**	**$ -**	**$ -**	**$ (5,966,067.28)**
15	**TOTAL REVENUE**				**$ (7,780,367.28)**		**$ (1,552,641.20)**	**$ (6,227,726.08)**
16	SURVEYING FEES				$ 100,000.00	$ -	$ -	$ 100,000.00
17	INDIRECT COST	Collier County	Indirect Cost	Direct Pay	$ 6,000.00	$ 6,000.00	$ -	$ -
18	INTERDEPT PAYMENT	Collier County	Real Property Department	Direct Pay	$ 1,000.00	$ -		$ 1,000.00
		Ground Zero Landscaping Serv	Landscape Incidentals PO TBD	4500233442	$ 82,000.00	$ 27,638.36	$ 54,361.64	$ -
					$ -			$ -
					$ -			
19	**LANDSCAPE INCIDENTALS**				**$ 100,000.00**	**$ 27,638.36**	**$ 54,361.64**	**$ 18,000.00**
		LANDERT LANDSCAPE DESIGI	Plant materials for Butterfly Garden	4500236759	$ 956.00	$ 956.00		
		RWA Engineering	Sidewalk Improvements - Phase II	4500236702	$ 33,632.00	$ 33,632.00		
		Capital Contractors	Connor Park-Decorative Fence Extension V	4500236174	$ 69,500.00	$ 69,500.00		
		INFINITE CONSTRUCTION LLC	Vanderbilt Dr Sidewalk& Landscape Improv	4500232472	$ 419,171.98	$ 41,800.00	$ 377,371.98	
		Ground Zero	Maint and Non-Bid Items	4500233442	$ 75,500.00	$ 41,353.55	$ 34,146.45	
		DRMP, INC	CAI Project Admin and Inspection Services	4500232514	$ 58,760.00	$ 31,701.00	$ 27,059.00	
		Preferred Materials	Brick paver crosswalk	4500232149		$ 437,124.80		
		RWA Engineering	Sidewalk Improvements - Phase I	4500231986	$ 58,363.00	$ 33,903.75	$ 24,459.25	
		MCGEE & ASSOCIATES	MCGEE & ASSOCIATES	4500231013	$ 6,197.50	$ 4,755.00	$ 1,442.50	
		Q Grady Minor	WO West Vanderbilt Dr Sidewalks	4500225615	$ 76,976.00	$ 57,648.15	$ 19,327.85	
		Capital Contractors	Sidewalk and bench refurbishment	4500231023		$ 25,250.00		
20	**OTHER CONTRACTUAL**				**$ 6,244,867.28**	**$ 777,624.25**	**$ 483,807.03**	**$ 4,983,436.00**
21	POST FREIGHT UPS				$ 100.00	$ -		$ 100.00
22	ELECTRICITY	FPL	Electricity	4700005131	$ 700.00	$ 472.18	$ 77.82	$ 150.00
23	WATER AND SEWER	Collier County Utility	Water & Sewer	4700005130	$ 100,000.00	$ 39,371.67	$ 20,628.33	$ 40,000.00
24	RENT BUILDINGS				$ -	$ -	$ -	$ -
25	INSURANCE GENERAL	Collier County	Insurance General	Direct	$ 800.00	$ 800.00	$ -	$ -
26	SPRINKLER SYSTEM MAIN	Site One	Irrigation Parts	4500233443	$ 10,000.00	$ 2,250.48	$ 749.52	$ 7,000.00
27	MULCH				$ 5,000.00			$ 5,000.00
28	LICENCES AND PERMITS				$ 2,000.00		$ 1,835.00	$ 165.00
29	CLERKS RECORDING FEES				$ 1,000.00			$ 1,000.00
30	LEGAL ADVERTISMENT					$ -	$ -	$ -
31	OTHER MISCELLANEOUS	Premier Staffing	Transcriptionist Serv.	4500234383	$ 2,500.00	$ 2,084.20	$ 2,033.02	$ (1,617.22)
32	OFFICE SUPPLIES		Office Supplies		$ 200.00		$ -	$ 200.00
33	COPYING CHARGES	JM Todd	Monthly CPC (shared) (monthly lease)	4500234730	$ 200.00	$ 108.39	$ 41.61	$ 50.00
35	FERT HERB CHEM				$ 2,000.00	$ -		$ 2,000.00
36	OTHER OPER SUPPLIES				$ 500.00			$ 500.00
37	**OPERATING EXPENSE**				**$ 6,576,867.28**	**$ 856,349.53**	**$ 563,533.97**	**$ 5,156,983.78**
38	IMPROVEMENTS GENERAL				$ 1,000,000.00	$ -		$ 1,000,000.00
39	**CAPITAL OUTLAY**				**$ 1,000,000.00**	**$ -**	**$ -**	**$ 1,000,000.00**
40	TRANS TO 1011 UNINCOR				$ 102,300.00	$ -	$ -	$ 102,300.00
41	**TRANSFERS**				**$ 102,300.00**	**$ -**	**$ -**	**$ 102,300.00**

VANDERBILT MSTU
FUND 161700000
February 7, 2025
FY25

42	Budget Trans from Appraiser				$ 14,500.00	$ -	$ 7,066.92	$ 7,433.08
43	Budget Trans from Tax Collector				$ 36,700.00	$ -	$ 30,138.99	$ 6,561.01
44	**TRANSFERS CONST**				**$ 51,200.00**	$ -	**$ 37,205.91**	**$ 13,994.09**
45	**RESV For Capital Out**				**$ 50,000.00**	$ -	**$ -**	**$ 50,000.00**
46	**RESERVES**				**$ 50,000.00**	$ -	**$ -**	**$ 50,000.00**
47	**TOTAL BUDGET**				**$ 7,780,367.28**	**$ 856,349.53**	**$ 600,739.88**	**$ 6,323,277.87**

2,068,487,415	FY 10 Final Taxable Value
2,005,897,752	FY 11 Final Taxable Value
1,910,384,837	FY 12 Final Taxable Value
1,904,053,751	FY 13 July 1 Taxable Value
1,945,640,639	FY 14 July 1 Taxable Value
2,044,186,286	FY 15 July 1 Taxable Value
2,195,715,846	FY 16 July 1 Taxable Value
2,385,578,106	FY 17 July 1 Taxable Value
2,560,181,524	FY 18 July 1 Taxable Value
2,673,862,805	FY 19 July 1 Taxable Value
2,805,690,115	FY 20 July 1 Taxable Value
2,874,630,743	FY 21 July 1 Taxable Value
2,977,182,419	FY22 July 1 Taxable Value
3,404,417,979	FY23 July 1 Taxable Value
3,512,537,975	FY24 July 1 Taxable Value
3,841,472,517	FY25 July 1 Taxable Value
	11.17%
	FY 25 **FY 24**

Total Available Balance	$	6,323,277.87
Plus Commited And Not Spent	$	856,349.53
Estimated Cash	**$**	**7,179,627.40**
Estimated Cash Less Uncollected Ad Valorem Taxes	**$**	**6,888,651.99**
Actual Cash		

Prepared on 01/29/2025 Z

GROUND ZERO LANDSCAPING

Services Inc.
1907 Fairfax Circle
Naples Fl. 34109
239-821-3472 Phone 239-597-7365 Fax

Estimate

Number: **E696**

Date: **January 14, 2025**

Bill To:

Collier County County Commiss
Att:Accounts Payable
3299 Tamiami Tr. E.
Ste 700
Naples, Fl. 34112-5749

Ship To:

PO Number	Terms	Project
4500233442		Vanderbilt Bch. MSTU

Date	Description	Hours	Rate	Amount
	Planting At wiggans beach trolly turn around removal and relandscape			
	truck and operator	40.00	55.00	2,200.00
	Labor	160.00	38.00	6,080.00
	Supervision	15.00	50.00	750.00
	Podocarpus 15 gallon	8.00	40.00	320.00
	Silver button 7 gallon	31.00	16.50	511.50
	Calusia 15 gal	36.00	40.00	1,440.00
	Bougaivillea 15 gallon trellis	10.00	75.00	750.00
	Wild coffee	14.00	4.50	63.00
	Boxwood carrissa	20.00	5.00	100.00
	Loropalatum	85.00	4.50	382.50
	Bulbine	20.00	1.85	37.00
	Bougainvillea	15.00	6.00	90.00

GROUND ZERO LANDSCAPING

Services Inc.
1907 Fairfax Circle
Naples Fl. 34109
239-821-3472 Phone 239-597-7365 Fax

Estimate

Number: **E696**

Date: **January 14, 2025**

Bill To:

Collier County County Commiss
Att:Accounts Payable
3299 Tamiami Tr. E.
Ste 700
Naples, Fl. 34112-5749

Ship To:

PO Number	Terms	Project
4500233442		Vanderbilt Bch. MSTU

Date	Description	Hours	Rate	Amount
	Crushed shell /ton	4.00	100.00	400.00
	Mulch	210.00	2.86	600.60
	15 % mark up	1.00	704.19	704.19
	Tax	1.00	281.67	281.67
	Irrigation Supervision	12.00	50.00	600.00
	Irrigation labor	40.00	45.00	1,800.00

Total **$17,110.46**

GROUND ZERO LANDSCAPING

Services Inc.
1907 Fairfax Circle
Naples Fl. 34109
239-821-3472 Phone 239-597-7365 Fax

Estimate

Number: **E697**

Date: **January 14, 2025**

Bill To:

Collier County County Commiss
Att:Accounts Payable
3299 Tamiami Tr. E.
Ste 700
Naples, Fl. 34112-5749

Ship To:

PO Number	Terms	Project
4500233442		Vanderbilt Bch. MSTU

Date	Description	Hours	Rate	Amount
	Cleanup and Replace mulch in construction disturbed areas conner park and vanderbilt Dr. Replace dead crushed bougainvillea noth side wall conner park			
	Labor	67.00	38.00	2,546.00
	Supervision	2.00	50.00	100.00
	Mulch	420.00	2.86	1,201.20
	Bougainvillea	20.00	7.50	150.00
	15 % mark up	1.00	202.68	202.68
	Tax	1.00	81.07	81.07
			Total	**$4,280.95**

GROUND ZERO LANDSCAPING

Services Inc.
1907 Fairfax Circle
Naples Fl. 34109
239-821-3472 Phone 239-597-7365 Fax

Estimate

Number: **E698**

Date: **January 14, 2025**

Bill To:

Collier County County Commiss
Att:Accounts Payable
3299 Tamiami Tr. E.
Ste 700
Naples, Fl. 34112-5749

Ship To:

PO Number	Terms	Project
4500233442		Vanderbilt Bch. MSTU

Date	Description	Hours	Rate	Amount
	Clean and prune seagrprape trees and woods area west side of bridge slope southside of bluebell.			
	Labor	64.00	38.00	2,432.00
	Supervision	6.00	50.00	300.00
			Total	**$2,732.00**

Vanderbilt Beach M.S.T.U

Advisory Committee
8300 Radio Road
Naples, FL 34104

JANUARY 7, 2025

I. CALL TO ORDER AND PLEDGE OF ALLEGIANCE

Chair Forman called the meeting to order at 2:00 P.M. Roll call was taken, and a quorum of three was established. The Pledge of Allegiance was recited.

II. ATTENDANCE

Advisory Committee:	Bruce Forman – Chair
	William Sjostrom – Vice Chair
	Mark Weber (Excused)
	Gabriella R. Miyamoto
	William Arell Harris (Excused)
Staff:	Judy Sizensky - Project Manager
	Brian Wells – Director, PTNE (ZOOM)
	Rosio Garcia – Operations Analyst
	Keyla Castro - Operations Support Specialist
Others:	Aaron Gross – Ground Zero Landscaping
	Wendy Warren - Transcriptionist

III. APPROVAL OF THE AGENDA

Vice Chair Sjostrom moved to approve the Agenda of the Vanderbilt Beach MSTU Advisory Committee as presented. Second by Ms. Miyamoto. Carried unanimously 3 - 0.

IV. APPROVAL OF THE MINUTES – November 7, 2024

Ms. Miyamoto move to approve the minutes of the November 7, 2024, Vanderbilt Beach MSTU meeting as presented. Second by Vice Chair Sjostrom. Carried unanimously 3 – 0.

V. LANDSCAPE MAINTENANCE REPORT – Aaron Gross, Ground Zero Landscaping Services

Mr. Gross reported:

- Vanderbilt Drive landscape refurbishment, west of the sidewalk, is continuing in areas impacted by Hurricane Milton.
- Clusia interspersed with Jatropha trees were planted on the north side of Bluebill Avenue bordering the parking lot.
- The wetland retention area gully, adjacent to the tennis courts, needs to be cleared of debris. The County mowed the side hill.
- Sea Grapes on Conner Park's south property line, fell over the guard rail during Hurricane Milton.

- The plants are too large to stand up. Options are "trunking" or removing the plant.
- Maintenance of the area is not the County's responsibility.

***Ms. Sizensky** will walk the area with Mr. Gross to evaluate the options.*

Committee discussion:

- Green utility boxes abandoned by companies no longer providing service in the area should be removed.

VI. VANDERBILT DRIVE REFURBISHMENT – Judy Sizensky

Ms. Sizensky reported:

A. Regatta Corner of Vanderbilt Drive and Vanderbilt Beach Road

- The project, undertaken with Infinite Construction, is near completion.
- Upon completion of punch list items and passage of Right of Way (ROW) inspection, final payment will be processed and the project closed out.
- Retention of a Construction, Engineering & Inspection (CEI) firm was beneficial to the process.

B. Crosswalks (6 with 1 alternate) Along Vanderbilt Beach Drive

Ms. Sizensky reported:

- Preferred Materials was awarded a contract to install six paver crosswalks, three north of The Regatta of Naples and three at the Anchorage at Vanderbilt, The Dunes of Naples and Marina Bay.
- The brick paver installation is complete. Asphalt work must be finalized for one crosswalk at the Chateau Vanderbilt entrance.
- With passage of the ROW inspection, final payments will be processed and the project closed out.

C. Vanderbilt Drive Landscape

Vanderbilt Beach Road to Bluebill Avenue Landscape West Side Vanderbilt Drive

Ms. Sizensky reported that Ground Zero Landscaping has completed the landscape refurbishment.

VII. PROJECT MANAGER REPORT – Judy Sizensky

Ms. Sizensky reported:

A. Budget FY-25

Vanderbilt Beach MSTU Fund 1617 Budget for January 7, 2025, prepared December 26, 2024.

Purchase Orders

1. Collier County Utilities – Water and Sewer.
2. FPL – Electricity.
3. Capital Contractors – Sidewalk and bench refurbishment.
4. DRMP, Inc. – Greenway multi-use pathway.
5. Ground Zero Landscaping –
   - Incidentals are for landscape refurbishment and miscellaneous.
   - Ground Maintenance includes Conner Park and irrigation repairs.
   - Non-Bid Items: Vanderbilt Drive Landscape Refurbishments.

6. Infinite Construction – Renovation of the corner of The Regatta of Naples and Vanderbilt Drive.
7. Preferred Materials – Installation of crosswalks.
8. McGee & Associates – Architectural Landscape services.
9. Premier Staffing – Transcription services.
10. Q Grady Minor & Associates - West Vanderbilt Drive sidewalks.
11. RWA Engineering – Design services for the Greenway multi-use path project.
12. Site One Landscape Supply – Irrigation parts & pumps.

Budget Summary

a. Line 1, Ad Valorem Tax Millage: Of the Millage assessed and to be collected of $1,786,300, $1,443,886 has been collected, leaving an outstanding balance of $342,413.
b. Line 5, Investment Interest: Of the $28,000 budgeted, $15,064 has been credited, leaving a balance of $15,064 to collect.
c. Line 11, Carry Forward – Unexpended prior year funds of $5,052,000.
d. Line 15, Total Revenue - $7,780,367, including investment interest, transfers, and contributions, minus a 5% ($90,800) reserve for estimated uncollected revenue.
e. Line 37, Operating Expense - Of the $6,576,067 budgeted, $1,144,733 is committed to existing Purchase Orders and $240,327 has been spent, leaving a budget remainder of $5,191,807 available within budget for additional operating expenses as needed.
f. Line 39, Capital Outlay - Budgeted at $1,000,000 is for the current fiscal year long term projects, consistent with the MSTU ordinance and upon a motion from the Advisory Committee.
g. Line 40, Transfer to Fund 111 - Of the $102,300 budgeted $0 remains has been transferred (PTNE Staff and Support).
g. Line 44, Transfer Construction – Of the $51,200 Budgeted, $32,749 has been transferred and a balance of $18,450 remains for transfer (Property Appraiser and Tax Collector).
h. Line 46, Capital Reserves - Of the $50,000 budgeted for anticipated Maintenance and Capital projects in future fiscal years as identified in the Asset Management Plan, $0 has been spent and a balance of $50,000 remains.
j. Line 47, Total Budget – Of the $7,789,367, tabulated commitments to existing purchase orders total $1,144,733, $273,076 has been expended leaving a remainder of $6,362,557 for FY-25 MSTU expenditures.

General

a. Available funds are sufficient to satisfy outstanding invoices for the landscaping at the Regatta of Naples at Vanderbilt Beach Road and Vanderbilt Drive, the crosswalks, the Vanderbilt Drive landscape renovation project, the Greenway Multi-Use Path and sidewalk installation on the east side of Vanderbilt Drive.
b. The Ad Valorem property tax value increased 11.17% for fiscal year 2025 over 2024 generating additional revenue of $30,000.
c. Funds not spent in FY-25 (fiscal year 2025) will be carried forward into FY-26.
d. Tax millage collected and interest can only be utilized by the MSTU and within the district boundary.

Millage Rate

The Committee will analyze the Millage Rate for FY-26 with consideration for current and future expenses in the first quarter of 2025. Options are:

- Revenue Neutral: Lower the current millage rate to maintain the FY-25 income level.
- Millage Neutral: Maintain the current millage rate of 0.5000 mills, increasing revenue equal to the Ad Valorem property value increase assessed by the County appraiser.

B. Utilities Project Landscape Refurbishment

Ms. Sizensky reported the Burial Project landscaping restoration at The Dunes of Naples and the Anchorage at Vanderbilt is completed. Sod will be installed at The Dunes.

C. Greenway Multi-Use Bike Path – Vanderbilt Drive – Gulf Shore Drive

Ms. Sizensky reported:

- A 10-foot bike and pedestrian path north of The Dunes of Naples on Vanderbilt Drive near the bridge cannot be navigated at high tide or during extreme rain events.
- RWA Engineering provided an "Engineer's Opinion of Probable Cost" for improvements to the infrastructure of 2075 linear feet of the Vanderbilt Drive sidewalk in the amount of $347,593.74 including engineering services and a 10% contingency. The plans are 90% complete.
- RWA is extending the plans to incorporate the entire stretch of the pathway from The Dunes of Naples to the Anchorage Vanderbilt and Marina Bay.
- RWA's estimated cost for design services and construction for the revised project is $750,000.00.
- The South Florida Water Management District (SFWMD) will be consulted on the project.
- Plans are subject to Road Maintenance approval prior to construction.
- The Road Maintenance Division may consider undertaking construction with costs borne by the MSTU.
- The Road Maintenance Division will be responsible for maintaining the walkway following completion of construction.

***Ms. Sizensky** will present the 30% plans to the Committee at a future meeting.*

D. Gulf Shore Drive Sidewalks

Ms. Sizensky reported RWA Engineering received the work order to design plans to install a new concrete sidewalk and improve drainage on the northeast corner of Gulf Shore Drive and Vanderbilt Beach Road from Buzz's Lighthouse Restaurant to LaPlaya's service building.

She provided details on the work garnered from a November 6, 2024, meeting with the consultant to review the project.

***Ms. Sizensky** will present the 30% engineering plans and an Opinion of Cost to the Committee at a future meeting.*

E. Bench and Sidewalk Project

Ms. Sizensky reported:

- The south portion of the new concrete sidewalk between *Le Dauphin* and *La Playa*, constructed by Capital Contractors, did not pass inspection due to paving aggregates surfacing during a rain event post construction.

- The Permitting Department also determined a handrail is required in front of the drain.
- Capital Contractors submitted revised engineering plans addressing the Right-of-Way (ROW) issues sited by the County.
- Construction to remedy the issues will commence soon.

F. Decorative Wall Extension Conner Park

Ms. Sizensky reported:

- A permit to extend the decorative post and rail wall on the south side of the park has been issued.
- The fence will be extended approximately sixty-two feet with columns spaced 15 feet apart.
- A gate to enable maintenance access for the Parks and Recreation Department is incorporated in the design and construction plans.
- The construction contract has been awarded to Capital Contractors, the vendor for the original fence installation, in the amount of $69,500.00.
- Ground Zero Landscaping will locate and "flag" the irrigation system in preparation for construction.
- Ground Zero Landscaping will remove vegetation and mow the grass on the south side of Conner Park in preparation for installation of the new fence at a cost of $1,316.00 if the Parks and Recreation Department fails to prepare the area.

G. Butterfly Garden Restoration

Ms. Sizensky reported:

- Community volunteers will refurbish the original Butterfly Garden.
- Creation of a new garden, east of the tree, will also be undertaken by the resident volunteers.
- The plants for the projects have been ordered at a cost of $958.00 from the MSTU.

VIII. OLD BUSINESS

Ms. Sizensky reported:

A. Traffic Signal Box

- The Committee motioned to approve $100,000.00 to relocate the County's Traffic Signal Box on the northwest corner of Vanderbilt Drive to the Right of Way (ROW) on the south side of Vanderbilt Beach Road.
- A licensed engineer on contract with the County, DRMP, Inc., has been assigned to submit a cost proposal for relocation of the box and prepare the plans.
- The project is contingent upon approval of the Traffic Operations Division.
- DRMP, Inc. would perform the work and invoice the MSTU for the expense.
- Relocation of the box will improve the appearance of the landscaped areas at The Regatta Vanderbilt Beach.

IX. NEW BUSINESS

Ms. Sizensky reported:

A. Wiggins Pass Entrance Beautification

- Cribb, Philbeck & Weaver Group has been assigned to present plans accompanied by a quote proposal to reconfigure the turn-around section at the entrance to Delnor-Wiggins Pass State Park.
- She will meet with them to review the project on January 9, 2025.

- MSTU participation in cost sharing the project will be at the discretion of the Committee.
- A Memorandum of Understanding for the Program (MOA) will be written.

B. Bluebill Avenue Bridge Cleaning

- SCS will provide quotes to pressure wash and seal the Bluebill Avenue Bridge including removal of peeling paint from the "pile ons."
- SCS will submit separate quotes for condition restoration of all bridges within the MSTU boundaries.

C. Beautification 11118 Gulf Shore Drive Area

- The County noted it is not responsible for maintenance of the area.
- Aaron Gross, Ground Zero Landscaping, and Request a Quote (RFQ) to clean up the area.

D. Solar Lights on Vanderbilt Drive

- Solar spotlights to enhance landscaping on Vanderbilt Drive will be considered. Property owners will be consulted if the light installation borders their residence.

X. COMMITTEE COMMENTS

Future improvements to the Vanderbilt Beach MSTU for Committee consideration include:

Vanderbilt Drive North
Ms. Sizensky will consult with RWA Engineering on opportunities to improve drainage and beautify Vanderbilt Drive around the Anchorage, The Dunes of Naples and Marina Bay.

The Halas and Blue Bill Bridges
Opportunities to enhance landscaping in the vicinity and entrances to the bridges will be researched.

Gulf Shore Drive Sidewalks
Contributions to sidewalk improvements will be considered.

XII. ADJOURN

There being no further business for the good of the County, the meeting was adjourned by the Chair at 3:03 P.M.

VANDERBILT BEACH M.S.T.U. ADVISORY COMMITTEE

Bruce R Forman

Bruce Forman, Chair

The minutes approved by the Board/Committee on 2/6 ,2025 "*as submitted*" [X] or "*as amended*" [___].

NEXT MEETING

FEBRUARY 6, 2025 - 2:00 P.M.
Cocohatchee River Marina
13535 Vanderbilt Drive
Naples, Florida

Collier County Government

Communications, Government & Public Affairs
3299 Tamiami Trail E., Suite 102
Naples, Florida 34112-5746

colliercountyfl.gov
twitter.com/CollierPIO
facebook.com/CollierGov
youtube.com/CollierGov

February 28, 2025

FOR IMMEDIATE RELEASE

Notice of Public Hybrid Remote Meeting
Vanderbilt Beach Beautification MSTU Advisory Committee
Collier County, Florida

March 6, 2025
2:00 p.m.

Notice is hereby given that the **Vanderbilt Beach Beautification Municipal Service Taxing Unit (MSTU) Advisory Committee** will meet on **Thursday, March 6,** at **2:00 p.m.** This will be a Hybrid Remote meeting and it will be held at the Cocohatchee River Marina, 13535 Vanderbilt Drive, Naples, FL 34110. Some of the Board Members may be appearing remotely, with staff present in person. The public may attend either remotely or in person.

Individuals who would like to participate remotely should contact Rosio Garcia at Rosio.Garcia@colliercountyfl.gov by noon on March 6.

Remote participation is provided as a courtesy and is at the user's risk. The County is not responsible for technical issues.

The agenda will be available on the Collier County Government website at https://www.collierptne.com/mtsu/vanderbilt-beach-beautification-mstu-advisory-committee/

About the public meeting:

Two or more members of the Collier County Board of County Commissioners may be present and may participate at the meeting. The subject matter of this meeting may be an item for discussion and action at a future meeting.

All interested parties are invited to attend, and to register to speak. All registered public speakers will be limited to three minutes unless changed by the chairman.

Collier County Ordinance No. 2004-05 requires that all lobbyists shall, before engaging in any lobbying activities (including, but not limited to, addressing the Board of County Commissioners, an advisory board or quasi-judicial board), register with the Clerk to the Board at the Board Minutes and Records Department.

Anyone who requires an auxiliary aid or service for effective communication, or other reasonable accommodations to participate in this proceeding, should contact the Collier County Facilities Management Division, located at 3335 Tamiami Trail E., Suite 101, Naples, Florida 34112, or (239) 252-8380, as soon as

possible, but no later than 48 hours before the scheduled event. Such reasonable accommodations will be provided at no cost to the individual.

For more information, call Judy Sizensky at (239) 252-4980.

###

Vanderbilt Beach M.S.T.U.

Advisory Committee
8300 Radio Road
Naples, FL 34104

MARCH 6, 2025, 2:00 PM
Committee Members and Project Manager will meet at
Cocohatchee River Marina-13535 Vanderbilt Drive, Naples, FL 34110
All others are encouraged to attend via Zoom video conference

AGENDA

I. Call to order and Pledge of Allegiance

II. Attendance

Advisory Committee	Bruce Forman - Chairman	(11/13/2027)
	Bill Sjostrom - Vice Chairman	(11/13/2028)
	Mark Weber	(11/15/2025)
	Gabriella R. Miyamoto	(11/13/2027)
	William Harris	(11/13/2028)
	Aaron Gross, Ground Zero Landscaping	
	Judy Sizensky– Project Manager	
	Rosio Garcia – Operations Coordinator	
	Wendy Warren- Transcriptionist	

III. Approval of the agenda

IV. Approval of the Minutes – February 6, 2025

V. RWA representative-To discuss the N Vanderbilt Drive sidewalk plans and timeline for construction.

VI. Landscape Maintenance Report - Aaron Gross, Ground Zero Landscaping Services

VII. Vanderbilt Drive Refurbishment Projects– Judy Sizensky

A. Crosswalks (6) along VB Dr.- The crosswalk at The Dunes needs asphalt work to be done. Preferred Materials is scheduling that. Once ROW inspection is passed, the final payments will be process and the project closed out.

VIII. Project Manager Report – Judy Sizensky

A. Current Budget FY 25 – March 2025
B. The 90% plans are completed for the Greenway Multi-use Bike Path on Vanderbilt Drive the total cost for the project is $347,593.74. RWA is extending the plans ($33K) to incorporate the entire stretch along Vanderbilt Drive for and an additional cost of $347K. The total project is estimated to be $750K for construction.
C. Gulf Shore Drive - RWA submitted a preliminary cost estimate. We will have RWA at our April meeting to discuss options.
D. Capital Construction will redo the sidewalk at Le Dauphin per ROW Inspection notes. *Completed and Approved
E. Capital Construction submitted for the ROW permit of the decorative fence extension @ Connor Park. The amount is $69,500. Construction should begin soon.
F. The flowers for the butterfly garden are on hold per Parks & Rec while they survey all parks. The amount is $956. The volunteers will plant all materials.

IX. Old Business

A. Traffic signal relocation @ Vanderbilt Beach Rd & Vanderbilt Drive-Engineer has been assigned. It is DRMP, Inc, which we used on Crosswalks project. The workorder for $44,563 is in process.

X. New Business

A. Wiggins Pass-An engineering firm, Cribb Philbeck Weaver Group, has met onsite. They will submit the quote for the plans and construction asap.

B. SCS is on contract for bridges. They will have quotes asap for pressure washing and sealing. They do not recommend painting.

C. Clean-up of the area @ 11118 Gulf Shore Drive is complete. Quotes for Tradewinds ($6,877) and Connor Park Parking lot ($10,220) to discuss for approval.

XI. Public Comment

XII. Adjourn

NEXT MEETING DATE
APRIL 3, 2025
COCOHATCHEE RIVER MARINA, 13535 VANDERBILT DR, NAPLES, FL 34110

Vanderbilt Beach M.S.T.U

Advisory Committee
8300 Radio Road
Naples, FL 34104

FEBRUARY 6, 2025

I. CALL TO ORDER AND PLEDGE OF ALLEGIANCE

Chair Forman called the meeting to order at 2:01 P.M. Roll call was taken, and a quorum of four was established. The Pledge of Allegiance was recited.

II. ATTENDANCE

Advisory Committee:	Bruce Forman – Chair
	William Sjostrom – Vice Chair
	Mark Weber (Excused)
	Gabriella R. Miyamoto
	William Arell Harris
Staff:	Judy Sizensky - Project Manager
	Brian Wells – Director, PTNE (Excused)
	Rosio Garcia – Operations Analyst
	Keyla Castro - Operations Support Specialist
Others:	Aaron Gross – Ground Zero Landscaping
	Wendy Warren - Transcriptionist

III. APPROVAL OF THE AGENDA

Ms. Miyamoto moved to approve the Agenda of the Vanderbilt Beach MSTU Advisory Committee as presented. Second by Vice Chair Sjostrom. Carried unanimously 4 - 0.

IV. APPROVAL OF THE MINUTES – January 7, 2025

Ms. Miyamoto move to approve the minutes of January 7, 2025, Vanderbilt Beach MSTU Advisory Committee meeting as presented. Second by Mr. Harris. Carried unanimously 4 – 0.

V. LANDSCAPE MAINTENANCE REPORT – Aaron Gross, Ground Zero Landscaping Services

Mr. Gross reported:

- Irrigation lateral pipes were repaired from two main line breaks.
- Perennial planting beds were sprayed for weeds.
- Fertilizer will be applied in February.
- Sod will be installed between the sidewalk and the building at The Regatta of Naples.

Landscape Quotes

Ms. Sizenksy presented:

1. Delnor-Wiggins Pass State Park Entrance
    - Estimate number E696, dated January 14, 2025, in the amount of $17,110.46, for landscape restoration of the park entrance.
    - Ground Zero Landscaping will replace damaged plantings in the turnaround.
    - Ground Zero Landscaping will also relandscape the Park Drive area from the restroom facilities to Gulf Shore Drive by Moraya Bay Beach Tower.
    - Salt tolerant landscaping will be colorful and the irrigation system for the area, an asset of the Parks and Recreation Department, will be repaired and reactivated.

Ms. Miyamoto motioned to approve Estimate number E696, dated January 14, 2025, in the amount of $17,110.46 for landscape refurbishment of the entrance to Delnor-Wiggins Pass State Park. Second by Vice Chair Sjostrom. Carried unanimously 4 – 0.

2. 1118 Gulf Shore Drive Beautification
    - Estimate number E698, dated January 14, 2025, in the amount of $2,732.00, to prune trees and clean the southwest side of the Bluebill Avenue Bridge.
    - Prune Seagrape trees, clean wooded areas and remove debris on Conner Park's south property line, southwest of the Bluebill Avenue Bridge.

Mr. Harris motioned to approve Estimate number E696, dated January 14, 2025, in the amount of $2,732.00 to prune Seagrape trees and clean the area on the southwest side of the Bluebill Avenue bridge. Second by Ms. Miyamoto. Carried unanimously 4 – 0.

3. Conner Park and Vanderbilt Drive
    - Responsibility for repairs to park landscaping damaged during a County construction project will be requested.
    - Estimate number E697, dated January 14, 2025, in the amount of $4,280.95, will be considered at a future date.

VI. VANDERBILT DRIVE REFURBISHMENT – Judy Sizensky

Ms. Sizensky reported:

A. Regatta Corner of Vanderbilt Drive and Vanderbilt Beach Road

- The project, undertaken with Infinite Construction, is near completion.
- Upon completion of a few punch list items and passage of Right of Way (ROW) inspection, the final payment will be processed and the project closed out.
- A section of asphalt for the turn lane into the Regatta Vanderbilt Beach is cracking apart. The Director of Road Maintenance reviewed the area and agreed to redo it, a cost savings of $11,500.00 to the MSTU.
- Retention of a Construction, Engineering & Inspection (CEI) firm was beneficial to the process.

B. Crosswalks (6 with 1 alternate) Along Vanderbilt Beach Drive

Ms. Sizensky reported:

- Preferred Materials was awarded a contract to install six paver crosswalks, three north of The Regatta of Naples and three at the Anchorage at Vanderbilt, The Dunes of Naples and Marina Bay.

- A large culvert was uncovered during excavation for the crosswalk at the entrance of The Dunes of Naples creating a dip in the crosswalk slope. The crosswalk will be redone to correct the slope and eliminate the dip. A significant portion of the $26,000.00 repair cost is attributed to construction mobilization and Maintenance of Traffic (MOT). The contingency fee provision in the Purchase Order will fund the expense.
- With passage of the ROW inspection, final payments will be processed and the project closed out.

VII. PROJECT MANAGER REPORT – Judy Sizensky

Ms. Sizensky reported:

A. Budget FY-25

Vanderbilt Beach MSTU Fund 1617 Budget for February 7, 2025, prepared January 29, 2025.

Purchase Orders

1. Collier County Utilities – Water and Sewer.
2. FPL – Electricity.
3. Capital Contractors – Sidewalk and bench refurbishment.
4. DRMP, Inc. – Greenway multi-use pathway.
5. Ground Zero Landscaping –
   - Incidentals are for landscape refurbishment and miscellaneous.
   - Ground Maintenance includes Conner Park and irrigation repairs.
   - Non-Bid Items: Vanderbilt Drive Landscape Refurbishments.
6. Infinite Construction – Renovation of the corner of The Regatta of Naples and Vanderbilt Drive.
7. Landert Landscape Design – Plant materials for Butterfly Garden.
8. Preferred Materials – Installation of crosswalks.
9. McGee & Associates – Architectural Landscape services.
10. Premier Staffing – Transcription services.
11. Q Grady Minor & Associates - West Vanderbilt Drive sidewalks.
12. RWA Engineering – Design services for the Greenway multi-use path project, Phase I and II.
13. Site One Landscape Supply – Irrigation parts & pumps.

Budget Summary

a. Line 1, Ad Valorem Tax Millage: Of the Millage assessed and to be collected of $1,786,300, $1,495,324 has been collected, leaving an outstanding balance of $290,975.
b. Line 5, Investment Interest: Of the $28,000 budgeted, $23,035 has been credited, leaving a balance of $4,964 to collect.
c. Line 11, Carry Forward – Unexpended prior year funds of $5,052,000.
d. Line 15, Total Revenue - $7,780,367, including investment interest, transfers, and contributions, minus a 5% ($90,800) reserve for estimated uncollected revenue.
e. Line 37, Operating Expense - Of the $6,576,867 budgeted, $856,349 is committed to existing Purchase Orders and $563,533 has been spent, leaving a budget remainder of $5,156,983 available within budget for additional operating expenses as needed.
f. Line 39, Capital Outlay - Budgeted at $1,000,000 is for the current fiscal year long term projects, consistent with the MSTU ordinance and upon a motion from the Advisory Committee.
g. Line 40, Transfer to Fund 111 - Of the $102,300 budgeted $0 has been transferred (PTNE Staff and Support).
g. Line 44, Transfer Construction – Of the $51,200 Budgeted, $37,205 has been transferred and a balance of $13,994 remains for transfer (Property Appraiser and Tax Collector).

h. Line 46, Capital Reserves - Of the $50,000 budgeted for anticipated Maintenance and Capital projects in future fiscal years as identified in the Asset Management Plan, $0 has been spent and a balance of $50,000 remains.
j. Line 47, Total Budget – Of the $7,780,367, tabulated commitments to existing purchase orders total $856,349, $600,739 has been expended leaving a remainder of $6,323,277 for FY-25 MSTU expenditures.

Ms. Sizensky noted:

- RWA Engineering plans for the Greenway multi use sidewalk improvements were completed in two phases. The work order for Phase II is pending. Plans for Phase I will be presented to the Committee at the March meeting.
- Phases I and II of the Greenway multi use sidewalk improvement project on Vanderbilt Drive north will be undertaken simultaneously, possibly in summer 2025.
- Capital Contractors will proceed with the sidewalk repair on Gulf Shore Drive on receipt of a County issued permit.
- A balance of $40,000.00 is due Infinite Construction, LLC for the renovation project at Regatta at Vanderbilt Beach.
- Two additional invoices are pending from Preferred Materials for brick paver crosswalk construction,

General

a. Available funds are sufficient to satisfy outstanding invoices for the landscaping at the Regatta of Naples at Vanderbilt Beach Road and Vanderbilt Drive, the crosswalks, the Greenway Multi-Use Path and sidewalk installation on the east side of Vanderbilt Drive.
b. The Ad Valorem property tax value increased 11.17% for fiscal year 2025 over 2024 generating additional revenue of $30,000.
c. Funds not spent in FY-25 (fiscal year 2025) will be carried forward into FY-26.
d. Tax millage collected and interest can only be utilized by the MSTU and within the district boundary.

Millage Rate

The Committee will analyze the Millage Rate for FY-26 with consideration for current and future expenses in the first quarter of 2025. Options are:

- Revenue Neutral: Lower the current millage rate to maintain the FY-25 income level.
- Millage Neutral: Maintain the current millage rate of 0.5000 mills, increasing revenue equal to the Ad Valorem property value increase assessed by the County appraiser.

B. **Greenway Multi-Use Bike Path – Vanderbilt Drive – Gulf Shore Drive**

Ms. Sizensky reported:

- A 10-foot bike and pedestrian path north of The Dunes of Naples on Vanderbilt Drive near the bridge cannot be navigated at high tide or during extreme rain events.
- RWA Engineering provided an "Engineer's Opinion of Probable Cost" for improvements to the infrastructure of 2075 linear feet of the Vanderbilt Drive sidewalk in the amount of $347,593.74 including engineering services and a 10% contingency. The plans are 90% complete.
- RWA is extending the plans to incorporate the entire stretch of the pathway from The Dunes of Naples to the Anchorage Vanderbilt and Marina Bay.
- RWA's estimated cost for design services and construction for the revised project is $750,000.00.

- The South Florida Water Management District (SFWMD) will be consulted on the project.
- Plans are subject to Road Maintenance approval prior to construction.
- The Road Maintenance Division may consider undertaking construction with costs borne by the MSTU.
- The Road Maintenance Division will be responsible for maintaining the walkway following completion of construction.

C. Gulf Shore Drive Sidewalks

Ms. Sizensky reported RWA Engineering designed plans to install a new concrete sidewalk and improve drainage on the northeast corner of Gulf Shore Drive and Vanderbilt Beach Road from Buzz's Lighthouse Restaurant to LaPlaya's service building.

The *Opinion of Cost* for the project exceeded the MSTU's expectations. The project is on hold.

D. Bench and Sidewalk Project

Ms. Sizensky reported**:**

- The south portion of the new concrete sidewalk between *Le Dauphin* and *La Playa*, constructed by Capital Contractors, did not pass inspection due to paving aggregates surfacing during a rain event post construction.
- The Permitting Department also determined a handrail is required in front of the drain.
- Capital Contractors submitted revised engineering plans addressing the Right-of-Way (ROW) issues cited by the County.
- Construction is pending receipt of a concrete delivery.

E. Decorative Wall Extension Conner Park

Ms. Sizensky reported:

- A permit to extend the decorative post and rail wall on the south side of the park has been submitted.
- The fence will be extended approximately sixty-two feet with columns spaced 15 feet apart.
- A gate to enable maintenance access for the Parks and Recreation Department is incorporated in the design and construction plans.
- The construction contract has been awarded to Capital Contractors, the vendor for the original fence installation, in the amount of $69,500.00.
- Ground Zero Landscaping will locate and "flag" the irrigation system in preparation for construction.
- Ground Zero Landscaping will remove vegetation and mow the grass on the south side of Conner Park in preparation for installation of the new fence at a cost of $1,316.00 if the Parks and Recreation Department fails to prepare the area.
- Construction should commence soon.

F. Butterfly Garden Restoration

Ms. Sizensky reported:

- The Parks and Recreation Department is surveying all parks.
- The original garden and creation of a new garden, east of the tree, will be undertaken by resident volunteers on completion of the survey.
- The plant cost for the projects, $956.00, will be funded by the MSTU.

VIII. OLD BUSINESS

Ms. Sizensky reported:

A. Traffic Signal Box

- The Committee motioned to approve $100,000.00 to relocate the County's Traffic Signal Box on the northwest corner of Vanderbilt Drive to the Right of Way (ROW) on the south side of Vanderbilt Beach Road.
- DRMP, Inc., a licensed engineer on contract with the County, submitted a proposal in the amount of $44,000.00, to prepare plans for the relocation of the box.
- The plans will be submitted to Southern Signal for a quote to remove the signal box in its entirety and relocate it to the south side of Vanderbilt Beach Road by the entrance to the parking garage.
- The project is contingent upon approval of the Traffic Operations Division.
- The MSTU will be invoiced for the project cost.
- Relocation of the box will improve the appearance of the landscaped areas at The Regatta Vanderbilt Beach.

IX. NEW BUSINESS

Ms. Sizensky reported:

A. Wiggins Pass Entrance Beautification

- An on-site meeting with Cribb, Philbeck & Weaver Group, engineering consultants, was held to review the scope of the project.
- The firm will submit a quote proposal for design plans and construction costs to reconfigure the turn-around section at the entrance to Delnor-Wiggins Pass State Park. The design will enable vehicles to navigate the turnaround effectively.
- In coordination with the engineering designer, Ground Zero Landscaping will replace damaged plantings in the turnaround.
- Ground Zero Landscaping will also relandscape the Park Drive area from the restroom facilities to Gulf Shore Drive by Moraya Bay Beach Tower.
- Salt tolerant landscaping will be colorful and the irrigation system for the area, an asset of the Parks and Recreation Department, will be repaired and reactivated.
- A bench with an MSTU plaque will be installed.
- MSTU participation in cost sharing the project will be at the discretion of the Committee.
- A Memorandum of Understanding for the Program (MOA) will be written.

B. Bluebill Avenue Bridge Cleaning

- SCS cost quotes to pressure wash and seal the Bluebill Avenue Bridge, including removal of peeling paint from the vertical support structures (pylons), will be presented at the March meeting.
- SCS will submit separate quotes for condition restoration of all bridges within the MSTU boundaries.

C. Ground Zero Landscaping Quotes

These items were discussed under Item V, Landscape Maintenance Report.

D. Solar Lights on Vanderbilt Drive

- Solar spotlights to enhance landscaping on Vanderbilt Drive will be considered. Property owners will be consulted if the light installation borders their residence.

X. COMMITTEE COMMENTS

Future improvements to the Vanderbilt Beach MSTU for Committee consideration include:

Vanderbilt Drive North

Ms. Sizensky will consult with RWA Engineering on opportunities to improve drainage and beautify Vanderbilt Drive around the Anchorage, The Dunes of Naples and Marina Bay.

The Halas and Blue Bill Bridges

Opportunities to enhance landscaping in the vicinity and entrances to the bridges will be researched.

Gulf Shore Drive Sidewalks

Contributions to sidewalk improvements will be considered.

Ms. Sizensky *will address the ongoing sidewalk construction undertaken after Hurricane Milton on the west side of Gulf Shore Drive, north of LaPlaya, with the County to determine a completion date.*

Solar Lights on Vanderbilt Drive

Solar spotlights to enhance landscaping on Vanderbilt Drive will be considered. Property owners will be consulted if the light installation borders their residence.

Irrigation Reuse Water

Consideration should be given to underwriting the cost for the installation of a water line from US41 to Conner Park. The line would convert supply water to reuse water for Vanderbilt Drive and Conner Park.

Ms. Sizensky *will consult with the Wastewater Division and request attendance at an MSTU meeting to discuss the proposal.*

XII. ADJOURN

There being no further business for the good of the County, the meeting was adjourned by the Chair at 3:01 P.M.

VANDERBILT BEACH M.S.T.U. ADVISORY COMMITTEE

_____

Bruce Forman, Chair

The minutes approved by the Board/Committee on_____,2025 "*as submitted*" [___] or "*as amended*" [___].

NEXT MEETING

MARCH 6, 2025 - 2:00 P.M.
Cocohatchee River Marina
13535 Vanderbilt Drive
Naples, Florida

VANDERBILT MSTU
FUND 161700000
March 6, 2025
FY25

		Vendor	Item	PO#	Budget	Commitments	Expenditures	Total
1	CUR AD VALOREM TAX				$ (1,786,300.00)	$ -	$ (1,552,941.68)	$ (233,358.32)
2	DEL AD VALOREM				$ -	$ -	$ -	$ -
3	STATE REVENUE						$ -	$ 64,023.57
4	OVERNIGHT INTEREST				$ -	$ -	$ (45,272.41)	$ 45,272.41
5	INVESTMENT INTEREST				$ (28,000.00)	$ -	$ (36,413.30)	$ 8,413.30
6	INTEREST TAX COLL.				$ -	$ -	$ (1,285.51)	$ 1,285.51
7	**REVENUE STRUCTURE**				**$ (1,814,300.00)**	**$ -**	**$ (1,635,912.90)**	**$ (178,387.10)**
8	TRANSFERS FROM PROP APP				$ -	$ -	$ -	
9	TRANSFERS FROM TAX COLL				$ -	$ -	$ -	
10	REIMBURSEMENT -INTERDEPT.				$ -	$ -	$ -	$ -
11	CARRY FORWARD GENERAL				$ (5,052,000.00)	$ -	$ -	$ (5,052,000.00)
12	CARRY FOR OF ENCUMB AMT				$ (1,004,867.28)	$ -	$ -	$ (1,004,867.28)
13	NEG 5% EST REV				$ 90,800.00	$ -	$ -	$ 90,800.00
14	**TRANSFERS & CONTRIB**				**$ (5,966,067.28)**	**$ -**	**$ -**	**$ (5,966,067.28)**
15	**TOTAL REVENUE**				**$ (7,780,367.28)**		**$ (1,635,912.90)**	**$ (6,144,454.38)**
16	SURVEYING FEES				$ 100,000.00	$ -	$ -	$ 100,000.00
17	INDIRECT COST	Collier County	Indirect Cost	Direct Pay	$ 6,000.00	$ 3,000.00	$ 3,000.00	$ -
18	INTERDEPT PAYMENT	Collier County	Real Property Department	Direct Pay	$ 1,000.00	$ -		$ 1,000.00
		Ground Zero Landscaping Serv	Landscape Incidentals PO TBD	4500233442	$ 82,000.00	$ 22,766.36	$ 59,233.64	$ -
					$ -			$ -
					$ -			
19	**LANDSCAPE INCIDENTALS**				**$ 100,000.00**	**$ 22,766.36**	**$ 59,233.64**	**$ 18,000.00**
		LANDERT LANDSCAPE DESIG	Plant materials for Butterfly Garden	4500236759	$ 956.00	$ 956.00		
		RWA Engineering	Sidewalk Improvements - Phase II	4500236702	$ 33,632.00	$ 33,632.00		
		Capital Contractors	Connor Park-Decorative Fence Extension V	4500236174	$ 69,500.00	$ 69,500.00		
		INFINITE CONSTRUCTION LLC	Vanderbilt Dr Sidewalk& Landscape Improv	4500232472	$ 419,171.98	$ 41,800.00	$ 377,371.98	
		Ground Zero	Maint and Non-Bid Items	4500233442	$ 75,500.00	$ 41,353.55	$ 34,146.45	
		DRMP, INC	CAI Project Admin and Inspection Services	4500232514	$ 58,760.00	$ 23,820.00	$ 34,940.00	
		Preferred Materials	Brick paver crosswalk	4500232149		$ 240,646.70	$ 196,478.10	
		RWA Engineering	Sidewalk Improvements - Phase I	4500231986	$ 58,363.00	$ 33,903.75	$ 24,459.25	
		MCGEE & ASSOCIATES	MCGEE & ASSOCIATES	4500231013	$ 6,197.50	$ 3,925.00	$ 2,272.50	
		Q Grady Minor	WO West Vanderbilt Dr Sidewalks	4500225615	$ 76,976.00	$ 49,141.15	$ 27,834.85	
		Capital Contractors	Sidewalk and bench refurbishment	4500231023		$ 25,250.00		
		DRMP, INC	Relocation of Traffic Signal Controller	10334743		$ 44,563.00	$ -	
20	**OTHER CONTRACTUAL**				**$ 6,244,867.28**	**$ 608,491.15**	**$ 697,503.13**	**$ 4,938,873.00**
21	POST FREIGHT UPS				$ 100.00	$ -		$ 100.00
22	ELECTRICITY	FPL	Electricity	4700005131	$ 700.00	$ 420.07	$ 129.93	$ 150.00
23	WATER AND SEWER	Collier County Utility	Water & Sewer	4700005130	$ 100,000.00	$ 36,455.82	$ 23,544.18	$ 40,000.00
24	RENT BUILDINGS				$ -	$ -	$ -	$ -
25	INSURANCE GENERAL	Collier County	Insurance General	Direct	$ 800.00	$ 400.00	$ 400.00	$ -
26	SPRINKLER SYSTEM MAIN	Site One	Irrigation Parts	4500233443	$ 10,000.00	$ 2,032.41	$ 967.59	$ 7,000.00
27	MULCH				$ 5,000.00			$ 5,000.00
28	LICENCES AND PERMITS				$ 2,000.00		$ 2,335.00	$ (335.00)
29	CLERKS RECORDING FEES				$ 1,000.00			$ 1,000.00
30	LEGAL ADVERTISMENT					$ -	$ -	$ -
31	OTHER MISCELLANEOUS	Premier Staffing	Transcriptionist Serv.	4500234383	$ 2,500.00	$ 1,861.45	$ 4,652.77	$ (4,014.22)
32	OFFICE SUPPLIES		Office Supplies		$ 200.00		$ -	$ 200.00
33	COPYING CHARGES	JM Todd	Monthly CPC (shared) (monthly lease)	4500234730	$ 200.00	$ 81.73	$ 68.27	$ 50.00
35	FERT HERB CHEM				$ 2,000.00	$ -		$ 2,000.00
36	OTHER OPER SUPPLIES				$ 500.00			$ 500.00
37	**OPERATING EXPENSE**				**$ 6,576,867.28**	**$ 675,508.99**	**$ 791,834.51**	**$ 5,109,523.78**
38	IMPROVEMENTS GENERAL				$ 1,000,000.00	$ -		$ 1,000,000.00
39	**CAPITAL OUTLAY**				**$ 1,000,000.00**	**$ -**	**$ -**	**$ 1,000,000.00**

VANDERBILT MSTU
FUND 161700000
March 6, 2025
FY25

40	TRANS TO 1011 UNINCOR			$ 102,300.00	$ -	$ -	$	102,300.00
41	**TRANSFERS**			**$ 102,300.00**	**$ -**	**$ -**	**$**	**102,300.00**
42	Budget Trans from Appraiser			$ 14,500.00	$ -	$ 7,066.92	$	7,433.08
43	Budget Trans from Tax Collector			$ 36,700.00	$ -	$ 31,291.33	$	5,408.67
44	**TRANSFERS CONST**			**$ 51,200.00**	**$ -**	**$ 38,358.25**	**$**	**12,841.75**
45	**RESV For Capital Out**			**$ 50,000.00**	**$ -**	**$ -**	**$**	**50,000.00**
46	**RESERVES**			**$ 50,000.00**	**$ -**	**$ -**	**$**	**50,000.00**
47	**TOTAL BUDGET**			**$ 7,780,367.28**	**$ 675,508.99**	**$ 830,192.76**	**$**	**6,274,665.53**

2,068,487,415	FY 10 Final Taxable Value
2,005,897,752	FY 11 Final Taxable Value
1,910,384,837	FY 12 Final Taxable Value
1,904,053,751	FY 13 July 1 Taxable Value
1,945,640,639	FY 14 July 1 Taxable Value
2,044,186,286	FY 15 July 1 Taxable Value
2,195,715,846	FY 16 July 1 Taxable Value
2,385,578,106	FY 17 July 1 Taxable Value
2,560,181,524	FY 18 July 1 Taxable Value
2,673,862,805	FY 19 July 1 Taxable Value
2,805,690,115	FY 20 July 1 Taxable Value
2,874,630,743	FY 21 July 1 Taxable Value
2,977,182,419	FY22 July 1 Taxable Value
3,404,417,979	FY23 July 1 Taxable Value
3,512,537,975	FY24 July 1 Taxable Value
3,841,472,517	FY25 July 1 Taxable Value
	11.17%
	FY 25

FY 24

Total Available Balance	$	6,274,665.53
Plus Commited And Not Spent	$	675,508.99
Estimated Cash	**$**	**6,950,174.52**
Estimated Cash Less Uncollected Ad Valorem Taxes	**$**	**6,716,816.20**
Actual Cash		

Prepared on 02/27/2025 T













Compensation Breakdown

Controller Cabinet Relocation -Estimated Budget												
TASK / Title	Principal (QAQC)	Senior PM	Senior Engineer	Engineer	Admin	Senior PM (Survey)	Surveyor and Mapper	Senior Technician	Survey Crew - 3 man	Total Hours	Subtask Fee	Task Fee
Billable Rate	$ 238.00	$ 201.00	$ 175.00	$ 136.00	$ 73.00	$ 201.00	$ 142.00	$ 102.00	$ 185.00			
Total Hours	12	17	56	161	10	1	3	6	25	291		
1 Preliminary Engineering & Data Gathering	**0**	**3**	**3**	**7**	**5**	**1**	**3**	**6**	**25**	**53**		**$ 8,309.00**
1.1 Design Survey & Field Work	0	2	0	0	0	1	3	6	25	37	$ 6,266.00	
1.2 Utility Coordination	0	0	1	2	2	0	0	0	0	5	$ 593.00	
1.2.1 Initial Utility Notification	0	0	1	2	2	0	0	0	0	5	$ 593.00	
1.2.2 Coordination of other Utilities Relocations/Adjustments	0	1	1	3	1	0	0	0	0	6	$ 857.00	
2 Construction Plans (Engineering Phase)	**8**	**6**	**32**	**110**	**0**	**0**	**0**	**0**	**0**	**156**		**$ 23,670.00**
2.1 60% Plans and Specifications	4	3	16	60	0	0	0	0	0	83	$ 12,515.00	
2.2 90% Plans and Specifications	4	3	16	50	0	0	0	0	0	73	$ 11,155.00	
3 Final Contract & Bid Documents	**4**	**2**	**8**	**24**	**2**	**0**	**0**	**0**	**0**	**40**		**$ 6,164.00**
Prepare final plans, specifications, EOPC	4	2	8	24	2	0	0	0	0	40	$ 6,164.00	
4 Construction Phase Services	**0**	**6**	**13**	**20**	**3**	**0**	**0**	**0**	**0**	**42**		**$ 6,420.00**
4.1 Pre-Bid and Pre-Construction Meetings	0	2	3	4	2	0	0	0	0	11	$ 1,617.00	
4.2 Shop Drawing Review	0	2	6	6	0	0	0	0	0	14	$ 2,268.00	
4.3 Project Completion Record Drawings	0	2	4	10	1	0	0	0	0	17	$ 2,535.00	
TOTAL												**$ 44,563.00**

GROUND ZERO LANDSCAPING

Services Inc.
1907 Fairfax Circle
Naples Fl. 34109
239-821-3472 Phone 239-597-7365 Fax

Estimate

Number: **E703**

Date: **February 17, 2025**

Bill To:

Collier County County Commiss
Att:Accounts Payable
3299 Tamiami Tr. E.
Ste 700
Naples, Fl. 34112-5749

Ship To:

PO Number	Terms	Project
4500233442		Vanderbilt Bch. MSTU

Date	Description	Hours	Rate	Amount
	Remove existing 6 foot myrsine Hedge and clean area and replant North of tradewinds along sidewalk		0.00	
	Labor	96.00	38.00	3,648.00
	Supervision	8.00	50.00	400.00
	Calusia 15 gallon	41.00	40.00	1,640.00
	Mulch	140.00	2.86	400.40
	15 % mark up	1.00	306.06	306.06
	Tax	1.00	122.43	122.43
	Irrgation labor	8.00	45.00	360.00
			Total	**$6,876.89**

GROUND ZERO LANDSCAPING

Services Inc.
1907 Fairfax Circle
Naples Fl. 34109
239-821-3472 Phone 239-597-7365 Fax

Estimate

Number: **E704**

Date: **February 17, 2025**

Bill To:

Collier County County Commiss
Att:Accounts Payable
3299 Tamiami Tr. E.
Ste 700
Naples, Fl. 34112-5749

Ship To:

PO Number	Terms	Project
4500226992		Vanderbilt Bch. MSTU

Date	Description	Hours	Rate	Amount
	Second area New planting along blue bell ConnerPark West of newley sodded area towards the bridge			
	truck and operator	32.00	55.00	1,760.00
	Labor	96.00	38.00	3,648.00
	Supervision	14.00	50.00	700.00
	cleradendrun 7 gallon	4.00	35.00	140.00
	Bougainvillea	45.00	6.00	270.00
	Variegated arbicola	90.00	5.50	495.00
	Calusia 7 gallon	46.00	18.00	828.00
	Fire bush 3 gallon	46.00	4.25	195.50
	liriopi	120.00	1.85	222.00
	Mulch	140.00	2.86	400.40
	15 % mark up	1.00	382.64	382.64
	Tax	1.00	153.05	153.05

GROUND ZERO LANDSCAPING

Services Inc.
1907 Fairfax Circle
Naples Fl. 34109
239-821-3472 Phone 239-597-7365 Fax

Estimate

Number: **E704**

Date: **February 17, 2025**

Bill To:

Collier County County Commiss
Att:Accounts Payable
3299 Tamiami Tr. E.
Ste 700
Naples, Fl. 34112-5749

Ship To:

PO Number	Terms	Project
4500226992		Vanderbilt Bch. MSTU

Date	Description	Hours	Rate	Amount
	Delivery charge	1.00	100.00	100.00
	Irrigation labor	15.00	45.00	675.00
	Irrigation Supervision	5.00	50.00	250.00

Total **$10,219.59**