



To: Honorable Mayor and Village Council

Date: February 23, 2015

From: Ron E. Williams, Village Manager

Re: Roadway Resurfacing and
Striping of Public Roadways

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, RELATING TO ROADWAY RESURFACING AND STRIPING OF PUBLIC ROADWAYS WITHIN THE VILLAGE OF PALMETTO BAY; AUTHORIZING THE WAIVER OF FORMAL BIDDING REQUIREMENTS AND UTILIZING RFQ NO. 20130281, PREVIOUSLY ADVERTISED FOR BID BY MIAMI-DADE COUNTY WHICH IS REASONABLE AND OTHERWISE IN THE BEST INTEREST OF THE VILLAGE OF PALMETTO BAY AND PROVIDING FOR THE AWARD THEREOF TO H & J ASPHALT, INC., FURTHER AUTHORIZING THE VILLAGE MANAGER TO ISSUE A PURCHASE ORDER IN AN AMOUNT NOT TO EXCEED \$300,000.00 TO CONTINUE RESURFACING AND STRIPING VILLAGE ROADWAYS IN FY 2014-15; AND PROVIDING FOR AN EFFECTIVE DATE. (Administration)

BACKGROUND AND ANALYSIS:

The Department of Public Works is responsible for the inventory, inspection and resurfacing of Village roadways. In an effort to continue to improve the overall condition and quality of the existing roadways and to provide a safe pathway for vehicular travel, a contractor specializing in pavement and required striping with markings is required. The Roadway Resurfacing Program is an on-going project and the issue of pavement maintenance continues to be of high priority. Neighborhoods as identified in our plan are in need of resurfacing and as roadways are resurfaced pavement markings become necessary for safety and lane identification. Funding is budgeted on an annual basis for the Department of Public Works to continue to improve roadways conditions through ongoing resurfacing projects. Resident input and visual inspections by Public Works staff are also identified and prioritized for resurfacing and/or pavement markings. The approved contractor is responsible for resurfacing, striping placement and deletion of old pavement markings.

After evaluating current paving contracts entered into between neighboring municipalities and contractors, staff is recommending that, pursuant to Sec 2-175 of the Code of Ordinance, the Village “piggyback” on an existing contract between Miami-Dade County and H & J Asphalt, Inc. (RFQ No. 20130281) for roadway resurfacing. In FY 2014-2015 the Department anticipates expending \$300,000 for roadway resurfacing including lifting manholes, striping, and the installation of reflective pavement markings as described in the bid scope of services. The Village expended \$209,800 to resurface approximately 26,890 linear feet of two lane roadways in FY2013-2014 and including lifting numerous manholes, striping, and the installation of reflective pavement markings.

Section 2-175 of the Code of Ordinance authorizes the Village Manager to award a contract without sealed bidding upon determination that the purchase meets acceptability criteria and the supplier has a valid contract or purchase order through competitive process by another governmental entity in the state. H&J Asphalt, Inc. has agreed to authorize the Village to piggyback onto the existing contract with Miami-Dade County for roadway resurfacing services in accordance with the same pricing, terms and conditions including lifting manholes, striping, and the installation of reflective pavement markings in FY 14-15 as detailed in the attached contract for Project No. 20130281.

The Administration is respectfully requesting authorization from the Village Council to adopt the attached resolution authorizing the Village Manager to proceed with execution of a contract with H & J Asphalt, Inc. for continued roadway resurfacing and striping services in the Village of Palmetto Bay for an amount not to exceed \$300,000 in Fiscal Year 2014-2015.

FISCAL/BUDGETARY IMPACT:

The Village budgets this item under “Special Revenue Transportation Fund- Roadway and Traffic Improvements” for an amount not to exceed \$300,000 in Fiscal Year 2014-2015.

RECOMMENDATION:

Approval is recommended.

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39
40
41
42
43
44

RESOLUTION NO. _____

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, RELATING TO ROADWAY RESURFACING AND STRIPING OF PUBLIC ROADWAYS WITHIN THE VILLAGE OF PALMETTO BAY; AUTHORIZING THE WAIVER OF FORMAL BIDDING REQUIREMENTS AND UTILIZING RFQ NO. 20130281, PREVIOUSLY ADVERTISED FOR BID BY MIAMI-DADE COUNTY WHICH IS REASONABLE AND OTHERWISE IN THE BEST INTEREST OF THE VILLAGE OF PALMETTO BAY AND PROVIDING FOR THE AWARD THEREOF TO H & J ASPHALT, INC., FURTHER AUTHORIZING THE VILLAGE MANAGER TO ISSUE A PURCHASE ORDER IN AN AMOUNT NOT TO EXCEED \$300,000.00 TO CONTINUE RESURFACING AND STRIPING VILLAGE ROADWAYS IN FY 2014-15; AND PROVIDING FOR AN EFFECTIVE DATE. (Administration)

WHEREAS, the Department of Public Works is responsible for the inventory, inspection and resurfacing of Village roadways; and

WHEREAS, funding is budgeted on an annual basis for the Department of Public Works to continue to improve roadway conditions through ongoing resurfacing projects; and

WHEREAS, Miami-Dade County conducted a competitive bidding process for the procurement of roadway resurfacing services and awarded a bid to H & J Asphalt, Inc.; and

WHEREAS, Section 2-175 of the Code of Ordinance authorizes the Village Manager to award a contract without sealed bidding upon determination that the purchase meets acceptability criteria and the supplier has a valid contract or purchase order through competitive process by another governmental entity in the state; and

WHEREAS, pursuant to Sec 2-175 of the Code of Ordinance, the Village "piggyback" on an existing contract between Miami-Dade County and H & J Asphalt, Inc. (RFQ No. 20130281) for roadway resurfacing in FY 2014-2015; and

WHEREAS, in FY 2014-2015 the Department anticipates expending \$300,000 for roadway resurfacing including lifting manholes, striping, and the installation of reflective pavement markings as described in the bid scope of services; and

WHEREAS, H&J Asphalt, Inc. has agreed to authorize the Village to piggyback onto the existing contract with Miami-Dade County for roadway resurfacing services in accordance with the same pricing, terms and conditions including lifting manholes, striping, and the installation of reflective pavement markings in FY 14-15 as detailed in the attached contract for Project No. 20130281.

1 **WHEREAS**, the Administration recommends that it is in the best interest of the
2 Village contract with H & J Asphalt, Inc. for continued roadway resurfacing and striping
3 services in the Village of Palmetto Bay for an amount not to exceed \$300,000 in FY 2014-
4 2015; and

5
6 **WHEREAS**, the Village Manager is respectfully requesting authorization from the
7 Village Council to adopt the attached resolution to proceed with execution of a contract with
8 H & J Asphalt, Inc. for roadway resurfacing in FY 2014-2015;

9
10 **NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND VILLAGE**
11 **COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, AS FOLLOWS:**

12
13 **Section 1:** The Village Council hereby authorizes the Village Manager, pursuant to Sec 2-
14 175 of the Code of Ordinance, to piggyback on an existing contract between Miami-Dade County
15 and H & J Asphalt, Inc. RFQ No. 20130281, and enter into an agreement with H & J Asphalt,
16 Inc. for roadway resurfacing including lifting manholes, striping, and the installation of reflective
17 pavement markings in the Village of Palmetto Bay for an amount not to exceed \$300,000.

18
19 **Section 2:** This resolution shall take effect immediately upon approval.

20
21 **PASSED** and **ADOPTED** this ____ day of March 2015.

22
23
24
25 Attest: _____
26 Meighan J. Alexander
27 Village Clerk

Eugene Flinn
Mayor

28
29
30 APPROVED AS TO FORM AND LEGAL SUFFICIENCY FOR THE USE
31 AND RELIANCE OF THE VILLAGE OF PALMETTO BAY, FLORIDA ONLY:

32
33
34 _____
35 Dexter W. Lehtinen
36 Village Attorney

37
38
39 FINAL VOTE AT ADOPTION:

40
41 Council Member Katryn Cunningham _____

42
43 Council Member Tim Schaffer _____

1 Council Member Larissa Siegel Lara _____
2
3 Vice-Mayor John DuBois _____
4
5 Mayor Eugene Flinn _____
6



H & J ASPHALT, INC.

4310 NW 35th AVENUE
MIAMI, FL. 33142
PHONE: 305-634-3342 FAX: 305-634-3313
hjasph@bellsouth.net

January 16, 2015

To whom it may concern:

I Jorge Lorenzo Vice President of H & J Asphalt Inc. authorize The Village of Palmetto Bay to piggy back from the prices from our Miami Dade County Project No. 20130281.

If you have any additional questions please feel free to contact me.

Sincerely,

Jorge Lorenzo

Jorge Lorenzo
Vice President/ H & J Asphalt Inc.

RESOLUTION NO. 2014-

**A RESOLUTION OF THE VILLAGE OF PINECREST,
FLORIDA, AUTHORIZING THE MANAGER TO ENTER
INTO A CONTRACT WITH H & J ASPHALT, INC. FOR
THE 2014-15 PAVING PROJECT; PROVIDING FOR
AN EFFECTIVE DATE.**

WHEREAS, Miami-Dade County conducted a competitive bidding process for the procurement of paving services and awarded a bid to H & J Asphalt, Inc.; and

WHEREAS, pursuant to Section 2-287 of the Code of Ordinances, the Village Manager is authorized to execute contracts, as entered into by other governmental authorities, provided that the governmental authority has followed a competitive bidding procedure leading to the award of the bid or contract in question; and

WHEREAS, the Village Manager wishes to enter into a contract with H & J Asphalt, Inc. for the 2014-15 Paving Project;

NOW, THEREFORE, BE IT RESOLVED BY THE VILLAGE COUNCIL OF PINECREST, FLORIDA, AS FOLLOWS:

Section 1. That the Village Council hereby authorizes the Village Manager, pursuant to Section 2-287 of the Code of Ordinances, to "piggyback" on an existing contract between Miami-Dade County and H & J Asphalt, Inc. (RFQ No. 20130281), and enter into an agreement with H & J Asphalt, Inc. for the Village's 2014-15 roadway resurfacing project.

Section 2. This resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED this 9th day of September, 2014.

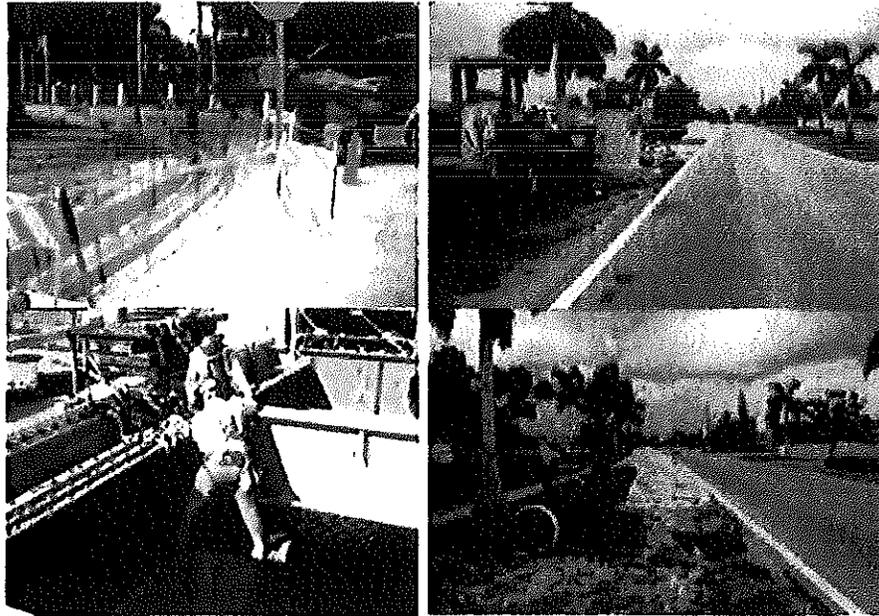
Cindy Lerner, Mayor

Attest:

Guido H. Inguanzo, Jr., CMC
Village Clerk

Approved as to Form and Legal Sufficiency:

Mitchell Bierman
Village Attorney



Roadway Resurfacing Contract

Miami-Dade County

Various Locations Countywide

Supplemental Solicitation
and Contract Documents

Community Small Business Enterprise Program:

CSBE Trade Set Aside

Community Workforce Program:

N/A

PWWM Contracts and Specifications Engineer:

Alicia Arce

RPQ Advertisement Date:

3/20/2014

**Miscellaneous Construction Contract (MCC) Program: MCC
RPQ No. 20130281, Contract No. CICC 7360-0/08**

May 15, 2014

CERTIFIED MAIL No.
7013 1710 0002 0984 4498

FACSIMILE; TELEPHONE No.
(305) 634-3313; (305) 634-3342

Mr. Humberto Lorenzo
H & J Asphalt, Inc.
4310 NW 35 Avenue
Miami, Florida 33142

CLERK OF THE BOARD
2014 MAY 21 PM 1:59
CLERK OF THE BOARD
MIAMI-DADE COUNTY, FLA.
#1

Re: **Recommendation for Award**
Request for Price Quotation (RPQ) No. 20130281 (MCC 7360 Plan)
Roadway Resurfacing Contract

Dear Mr. Lorenzo:

This letter will serve as your notification that you have been recommended for award for the above referenced RPQ based on your Price Quotation submitted on Wednesday, April 30, 2014. The total RPQ amount is for two million twenty-three thousand four hundred twenty-six dollars and fifty-one cents (\$2,023,426.51). This includes a base contract amount of one million seven hundred fifty-two thousand one hundred sixty-seven dollars and sixty cents (\$1,752,167.60), a contingency amount of one hundred seventy-five thousand two hundred sixteen dollars and seventy-six cents (\$175,216.76), and dedicated allowances totalling ninety-six thousand forty-two dollars and fifteen cents (\$96,042.15). The contract duration is established as **365-calendar days**. However, the recommendation of award is contingent upon the submission of the required items listed below:

1. Performance and Payment Bond as required in Contract No. MCC 7360 Plan, Section 2.0 Special Conditions, Page 16, Article 2.11, **PERFORMANCE AND PAYMENT BOND**. (The original attached documents must be used and three (3) sets must be provided).
2. Letter from Bonding Agent granting Miami-Dade County authorization to date the Performance Bond.
3. Copies of current insurance certificates.
4. Copies of required license(s).

The preceding documents are required as outlined within Contract MCC 7360 Plan and to be submitted within 10 business days. Failure to submit the document(s) within the specified time, or any extension granted, will result in the award being rescinded.

Subsequent to the review and approval of the aforementioned documents, you are required to obtain the required permits in the time stipulated in the RPQ. Upon obtaining the permit(s), a copy(s) must be submitted to the Project Manager prior to commencement of work.

No work is to be performed without a permit unless the Project Manager issues a written directive to proceed without permit(s).

This letter will also serve as a reminder that all work must be performed according to the scope of work and contract's terms and conditions, all permits and inspections and in accordance with all applicable Federal, State and local laws, codes and regulations.

Additionally, this contract, along with any future contracts awarded to your firm, have very similar completion scheduled and competing deadlines. Please be advised that your firm must have the resources to ensure work proceeds without delay once the "Notice to Proceed" is issued. Lack of equipment, personnel or additional contracts with similar completion schedules, will not be reason for delay.

Further, no award of this contract shall be effective and thereby give rise to a contractual relationship with the County unless and until a purchase order for this RPQ has been approved, issued and a Notice to Proceed has been executed.

Should you have any questions please contact me at (305) 375-2930.

Sincerely,



Frank Aira, P.E., CFM
Division Chief, PWWM

AM:lc

- c: Antonio Cotarelo, P.E., PWWM
- Bassam Moubayed, PWWM
- Rene Idarraga, P.E., PWWM
- Duane Kopp, P.E., PWWM
- Joaquin Rabassa, P.E., PWWM
- Alfredo Muñoz, P.E., PWWM
- Alvaro Castro, PWWM
- Alicia Arce, PWWM
- Marcia Martin, ISD
- Ultimo De Oliveira, ISD
- Patrice Hill, SBD
- Traci Adams-Parish, SBD
- Clerk of the Board
- Project File

Memorandum



Date: May 9, 2014

To: Alicia Arce, E.I.
Engineer II, PWWM

From: Gary Hartfield, Division Director
Internal Services Department
Small Business Development

Subject: CSBE Compliance Review
MCC 7360 Plan – CICC 7360-0/08 Request for Price Quotation (RPQ) No. 20130281
Roadway Resurfacing Contract

The Small Business Development (SBD) Division has completed its review of the subject project for compliance with the Community Small Business Enterprise (CSBE) Program for Construction Services. The contract measures established for this project are a 10% Community Workforce Program (CWP) Goal and CSBE Trade Set-Asides in the following trade areas:

- Trade Set-Aside #1 – Highway, Street, and Bridge Construction: Traffic Stripes & Markings
- Trade Set-Aside #2 – Concrete: Sidewalk and/or Curb and Gutter

The Contracts & Specifications Section of the Public Works and Waste Management Department (PWWM) has submitted bid documents from H & R Paving, Inc. (#1), and H & J Asphalt, Inc. (#2), for compliance review. Following is the pre-award compliance status and summary.

STATUS:

- | | |
|------------------------|-----------|
| 1. H & R Paving, Inc. | Compliant |
| 2. H & J Asphalt, Inc. | Compliant |

SUMMARY:

H & R Paving, Inc. (#1), submitted Schedule of Intent (SOI) Affidavits committing to utilize Highway Striping, Inc., a certified CSBE firm, to perform traffic stripes & markings, paint and/or thermoplastic work. Quality paving, Corp., a certified CSBE firm, was also listed to perform concrete: sidewalks and/or curb and gutter work. Each subcontractor signed its respective SOI Affidavit in agreement with the information listed. H & R Paving, Inc. is in compliance with the Implementing Order for the CSBE Program for the purchase of Construction Services.

H & J Asphalt, Inc., (#2), submitted SOI Affidavits committing to utilize Road Runner Striping Technologies, Inc., a certified CSBE firm, to perform striping work. American Builders Masters Corp., a certified CSBE firm, was also listed to perform concrete work. Each subcontractor signed its respective SOI Affidavit in agreement with the information listed. H & J Asphalt, Inc. is in compliance with the Implementing Order for the CSBE Program for the purchase of Construction Services.

SBD has verified that the aforementioned firms are not listed on the Goal Deficit Make-Up Report as of May 1, 2014. A review of the History of Violations Report as of May 2, 2014 indicates that the aforementioned firms do not have any open violations.

Alicia Arce
May 8, 2014
Project No. 20130280
Page 2

Please note that SBD staff reviewed and addressed compliance with the CSBE program. The Contracts & Specifications Section of the PWWM is responsible for any other issues that may exist

Should you have any questions or need any additional information, please do not hesitate to call Coralee Taylor at (305) 375-3115.

c: Frank Aira, PWWM
Lisset Cabrera, PWWM
Traci Adams-Parish, SBD
File

Contract Prices

Project Title: Roadway Resurfacing Contract
 Contractor: H & J ASPHALT, INC.

Project No: 20130281
 Bid Date: 04/30/2014

Item Number	Description	Unit	Estimated Quantity	Unit Price	Estimated Total
1WSR	Saw cut and remove an average of two (2) inches of temporary cold asphalt patch on trench in order to expose and evaluate the condition of the base. If base is found suitable, clean loose material and replace the amount of cold patch removed with hot type S asphaltic concrete up to the level of the surrounding surface.	S.F.	11,624.0	\$4.00	\$46,496.00
2WSR	Saw cut and remove an average of two (2) inches of existing temporary cold asphalt patch on trench in order to expose and evaluate the condition of the base. If base is found unsuitable by the Engineer, remove base material and replace with a minimum of eight (8) inches of compacted limerock or six (6) inches of hot S asphaltic concrete. In either case, replace the cold patch removed with hot type S asphaltic concrete up to the level of the surrounding surface.	S.F.	939.0	\$6.00	\$5,634.00
5WS1-A	Night Differential for Milling	P.N.	11.0	\$800.00	\$8,800.00
5WS1-A	Night Differential for Resurfacing	P.N.	11.0	\$1,000.00	\$11,000.00
101-327A	MOBILIZATION FOR MILLING. (To be paid once, per each Section of a Township and Range) May be deleted if no milling in Section.	PER/SCT	16.0	\$800.00	\$12,800.00
102-74-2	BARRICADES (Temporary, Type III, 6')	EA/DAY	24.0	\$1.00	\$24.00
102-76	FLASHING ARROW BOARD (Temporary, Multimode)	EA/DAY	28.0	\$14.00	\$392.00
102-8A	RE-GRADE EXISTING SWALE (Without sod) (When required by the Engineer.)	S.Y.	129.0	\$7.00	\$903.00
102-99	VARIABLE MESSAGE SIGN (Temporary)	EA/DAY	100.0	\$20.00	\$2,000.00
102-60A	WORK ZONE SIGNS	EA/DAY	359.0	\$0.50	\$179.50
110-4	REMOVAL OF EXISTING PAVEMENT	S.Y.	26.0	\$20.00	\$520.00
110-4-1-1	REMOVAL AND DISPOSAL OF EXISTING CURB AND GUTTER	L.F.	1,744.0	\$2.00	\$3,488.00
110-4-2A	REMOVAL OF EXISTING CONCRETE SIDEWALK (up to 8" thick, including base preparation)	S.Y.	969.0	\$15.00	\$14,535.00
120-1	REGULAR EXCAVATION	C.Y.	1,314.0	\$8.00	\$10,512.00
120-2-3	EMBANKMENT FOR ROAD BUILD-UP (Borrow material from Contractor's own source)	C.Y.	1,095.0	\$8.00	\$8,760.00
120-2-4	EMBANKMENT MATERIAL FOR SHOULDER - Borrow material, from contractor's own source, see Special Provisions for description of material.	C.Y.	219.0	\$20.00	\$4,380.00
160-4	TYPE "B" STABILIZATION (12" Thick) (Min. C.B.R. 30)	S.Y.	1,752.0	\$6.00	\$10,512.00
200-2	BASE PREPARATION FOR NEW SIDEWALK CONSTRUCTION (Where needed at the discretion of the Engineer)	S.Y.	388.0	\$6.00	\$2,328.00
210-1-2	LIMEROCK BASE (8" double course) (Printed)	S.Y.	1,752.0	\$8.00	\$14,016.00
327-70	MILLING EXISTING PAVEMENT [(1*)(Payment for greater cuts will be paid proportionally)]	S.Y.	119,917.0	\$2.10	\$251,825.70
334-2-13-1	Hot Mix Asphalt, Traffic C, SP-9.5	TON	2,600.0	\$101.00	\$262,600.00
337-8-42	Hot Mix Asphalt Friction Course, Traffic C, FC-9.5, PG 76-22	TON	5,831.0	\$107.00	\$623,917.00
425-4(2)	ADJUSTING INLETS	EA.	7.0	\$300.00	\$2,100.00
425-5	ADJUST MANHOLE (This item is contingent upon field conditions and may be increased, decreased or eliminated by the Engineer)	EA.	48.0	\$400.00	\$19,200.00
425-6	ADJUST EXISTING VALVE BOXES (MIAMI-DADE COUNTY ONLY) (This item is contingent upon field conditions and may be increased, decreased or eliminated by the Engineer)	EA.	78.0	\$400.00	\$31,200.00
425-721E	REMOVAL AND DISPOSAL of existing damaged frames and pick up new frames at Miami-Dade Water and Sewer, including adjustment and installation of Manholes.	EA.	3.0	\$800.00	\$2,400.00
425-721F	REMOVAL AND DISPOSAL of existing damaged frames and pick up new frames at Miami-Dade Water and Sewer, including adjustment and installation of Water Valves.	EA.	3.0	\$600.00	\$1,800.00
425-944B	RECONSTRUCT MANHOLE	EA.	3.0	\$1,000.00	\$3,000.00
520-2A	CONCRETE CURB AND/OR GUTTER (Any type, including base preparation)	L.F.	3,190.0	\$15.00	\$47,850.00
522-1(1)	CONCRETE SIDEWALK [4" THICK, 3,000 P.S.I. CONCRETE AT 28 DAYS (Includes the cost of pedestrian ramps and sidewalk curbs)	S.Y.	1,680.0	\$32.00	\$53,760.00
522-2	CONCRETE SIDEWALK [6" THICK, 3000 P.S.I. concrete at 28 days) (including pedestrian ramps and sidewalk curbs)	S.Y.	291.0	\$44.00	\$12,804.00

SCCRP_PROJECT_ITEM_PRICES

5/21/2014 03:17 PM

Page 1 of 3

Miami-Dade County Public Works and Waste Management Department

Contract Prices

Project Title: Roadway Resurfacing Contract
 Contractor: H & J ASPHALT, INC.

Project No: 20130281
 Bid Date: 04/30/2014

Item Number	Description	Unit	Estimated Quantity	Unit Price	Estimated Total
527-2	DETECTABLE WARNING ON WALKING SURFACE	S.F.	1,486.0	\$35.00	\$52,010.00
575-1-1	SODDING (Pensacola Bahia or match existing) (includes watering)	S.Y.	28.0	\$4.00	\$104.00
635-1-11	PULL BOX, METER TYPE (Polymer)	AS.	5.0	\$550.00	\$2,750.00
700-40-01	ROADSIDE SIGNS ((SINGLE POST) (LESS THAN 12 S.F.))	AS.	5.0	\$290.00	\$1,450.00
700-46-22	RESET EXISTING POST AND SIGN	EA.	7.0	\$70.00	\$490.00
705-71-361	36" TUBULAR DELINEATOR	EA.	28.0	\$75.00	\$1,950.00
706-1-12	REFLECTIVE PAVEMENT MARKERS (class B, mono or bi-directional, all colors)	EA.	3,174.0	\$4.00	\$12,696.00
710-11-121	PAINTED PAVEMENT MARKINGS (Standard, White, solid, 6")	L.F.	66,703.0	\$0.30	\$20,010.90
710-11-122	PAINTED PAVEMENT MARKINGS, STANDARD, WHITE, SOLID, 8"	L.F.	612.0	\$0.40	\$244.80
710-11-123	PAINTED PAVEMENT MARKINGS, STANDARD, WHITE, SOLID, 12"	L.F.	7,929.0	\$0.70	\$5,550.30
710-11-124	PAINTED PAVEMENT MARKINGS (Standard, White, solid, 18")	L.F.	1,118.0	\$1.00	\$1,118.00
710-11-125	PAINTED PAVEMENT MARKINGS (Standard, White, solid, 24")	L.F.	2,710.0	\$1.20	\$3,252.00
710-11-141	PAINTED PAVEMENT MARKINGS (Standard) (White) (Skip) (6")	L.F.	5,262.0	\$0.30	\$1,578.60
710-11-160	PAINTED PAVEMENT MARKINGS (Standard) (White) (Message)	EA.	33.0	\$40.00	\$1,320.00
710-11-170	PAINTED PAVEMENT MARKING (Standard) (White) (Arrows)	EA.	67.0	\$30.00	\$2,010.00
710-11-221	PAINTED PAVEMENT MARKINGS (Standard, Yellow, solid, 6")	L.F.	32,601.0	\$0.30	\$9,780.30
710-11-224	PAINTED PAVEMENT MARKINGS, STANDARD, YELLOW, SOLID, 18"	L.F.	4,065.0	\$1.00	\$4,065.00
710-11-241	PAINTED PAVEMENT MARKINGS (Standard) (Yellow) (Skip) (6")	L.F.	4,059.0	\$0.40	\$1,623.60
710-26-41A	SOLID TRAFFIC STRIPE, PAINT - (4" white, or yellow)	L.F.	9,829.0	\$0.30	\$2,948.70
711-2	SKIP TRAFFIC STRIPE (8' STRIPE, 10' SPACE) (WHITE THERMOPLASTIC) (6" WIDE)	L.F.	100.0	\$1.00	\$100.00
711-5	GUIDELINES ((8" DOTTED) (2'-4' White) (Thermoplastic))	L.F.	123.0	\$1.00	\$123.00
711-11-121	THERMOPLASTIC (White) (Solid) (6")	L.F.	66,703.0	\$0.90	\$60,032.70
711-11-122	THERMOPLASTIC (White) (Solid) (8")	L.F.	612.0	\$1.20	\$734.40
711-11-123	THERMOPLASTIC (White) (Solid) (12")	L.F.	7,929.0	\$2.00	\$15,858.00
711-11-124	THERMOPLASTIC (White) (Solid) (18")	L.F.	1,118.0	\$2.60	\$2,906.80
711-11-125	THERMOPLASTIC (White) (Solid) (24")	L.F.	2,710.0	\$3.30	\$8,943.00
711-11-141	THERMOPLASTIC (White) (Skip) (6")	L.F.	5,268.0	\$1.00	\$5,268.00
711-11-160	THERMOPLASTIC (White) (Message)	EA.	33.0	\$110.00	\$3,630.00
711-11-170	THERMOPLASTIC (White) (Arrows)	EA.	68.0	\$60.00	\$4,080.00
711-11-221	THERMOPLASTIC (Yellow) (Solid) (6")	L.F.	32,600.0	\$0.90	\$29,340.00
711-11-224	THERMOPLASTIC (Yellow) (Solid) (18")	L.F.	4,065.0	\$2.50	\$10,162.50
711-11-241	THERMOPLASTIC (Yellow) (Skip) (6")	L.F.	4,060.0	\$0.90	\$3,654.00
711-14-160	Thermoplastic, Preformed, White, Message	EA.	39.0	\$360.00	\$14,040.00
711-2A	SKIP TRAFFIC STRIPE, THERMOPLASTIC (4" WHITE/YELLOW, 6'-10' SKIP)	L.F.	26.0	\$1.00	\$26.00
711-33-34	SKIP TRAFFIC STRIPE - ((4" White/Yellow) (10' Stripe, 30' Skip) (Thermoplastic, lead free))	L.F.	5,908.0	\$0.80	\$4,726.40

Contract Prices

Project Title: Roadway Resurfacing Contract
 Contractor: H & J ASPHALT, INC.

Project No: 20130281
 Bid Date: 04/30/2014

Item Number	Description	Unit	Estimated Quantity	Unit Price	Estimated Total
711-35-41	SOLID TRAFFIC STRIPE -[[4" WHITE](Thermoplastic)]	L.F.	3,218.0	\$0.80	\$2,572.80
711-36-41	SOLID TRAFFIC STRIPE [[4" Yellow] (THERMOPLASTIC) (Lead-free)]	L.F.	682.0	\$0.80	\$545.60
711-72	REMOVAL OF EXISTING PAVEMENT MARKINGS (Thermoplastic & Paint)	S.F.	380.0	\$2.20	\$836.00

ALLOWANCE ACCOUNTS

(used as approved by the engineer pursuant to the requirements of the Contract Documents)

999	CONTINGENCY FUND (10% OF SUBTOTAL AMOUNT)	L.S.	1.0	\$175,216.76	\$175,216.76
102-10A	OFF-DUTY LAW ENFORCEMENT OFFICER	L.S.	1.0	\$40,000.00	\$40,000.00
102-1P	MAINTENANCE OF TRAFFIC (Including traffic cones, temporary signs, flag men, etc.)	L.S.	1.0	\$35,043.35	\$35,043.35
300-1-999	BITUMINOUS MATERIAL ADJUSTMENT	L.S.	1.0	\$20,000.00	\$20,000.00
990	ALLOWANCE-PERMITS	L.S.	1.0	\$998.80	\$998.80

Public Works and Waste
Management
Contracts & Specifications Section
111 NW 1st Street, Suite 1410
Miami, FL 33128



MIAMI-DADE COUNTY, FLORIDA
REQUEST FOR PRICE QUOTATION (RPQ)
Contract No: MCC 7360 Plan - CICC 7360-0/08
RPQ No: 20130281

RPQ BID FORM – ATTACHMENT 5A

RPQ Project Name: Roadway Resurfacing Contract

Price Proposal (Cost to Perform the work must be stated here. State 'No Bid' if not submitting a price proposal)

1,752,167.60

Bidder's Company Name: H & J Asphalt, Inc.

Company Address: 4310 N W 35 Avenue

Miami, FL 33142

City: _____ State: _____ Zip: _____

Telephone No: 305-634-3342 Fax No: 305-634-3313 EMail: hjasph@belleouth.net

THE EXECUTION OF THIS FORM CONSTITUTES THE UNEQUIVOCAL OFFER OF PROPOSER TO BE BOUND BY THE TERMS OF ITS PROPOSAL. FAILURE TO SIGN THIS SOLICITATION WHERE INDICATED BELOW BY AN AUTHORIZED REPRESENTATIVE SHALL RENDER THE PROPOSAL NON-RESPONSIVE. THE COUNTY MAY, HOWEVER, IN ITS SOLE DISCRETION, ACCEPT ANY PROPOSAL THAT INCLUDES AN EXECUTED DOCUMENT WHICH UNEQUIVOCALLY BINDS THE PROPOSER TO THE TERMS OF ITS OFFER.

Name of Person Submitting Quote (Print): Humberto Lorenzo

Number of Addendums received: 2 (If none write "None")

Signature: [Handwritten Signature]

Date: 4/23/14

Note: Quotes must be submitted on this form. Quote envelope must state RPQ Number, date and time due and the Bidder's Name. Use of any other form for submission of the price quotation shall result in the rejection of the price quotation. Late bids will not be opened. Low bidder will be notified, in the Recommendation of Award, of the requirements to submit current copies of insurance certificates in accordance with the Contract Documents. By signature, the CONTRACTOR agrees to be bound by the terms set forth in the MCC 7360 Plan.

In accordance with Miami-Dade County Implementing Order 3-9, Accounts Receivable Adjustments, if money is owed by the Contractor to the County, whether under this Contract or for any other purpose, the County reserves the right to retain such amount from payment due by County to the Contractor under this Contract. Such retained amount shall be applied to the amount owed by the Contractor to the County. The Contractor shall have no further claim to such retained amounts which shall be deemed full accord and satisfaction of the amount due by the County to the Contractor for the applicable payment due herein.

SURETY BID BOND	DATE BOND EXECUTED (must not be later than bid opening date) April 30, 2014	REV. 0510 PWD
------------------------	--	------------------

PRINCIPAL (Full legal name and business address) H & J Asphalt, Inc. 4310 NW 35th Avenue Miami, FL 33142	TYPE OF ORGANIZATION ("X" one) <input type="checkbox"/> Individual <input type="checkbox"/> Partnership <input type="checkbox"/> Joint Venture <input checked="" type="checkbox"/> Corporation
---	--

SURETY (Name and business address)
 Berkley Insurance Company
 7380 Sand Lake Road, Ste. 500
 Orlando, FL 32819

PENAL SUM OF BOND	*****Five Percent of the Total amount Bid*****			
BID IDENTIFICATION	Project No:	20130281	Bid Opening Date:	April 30, 2014
	County Project Name:	Roadway Resurfacing Contract		

OBLIGATION

Principal and Surety, jointly and severally, bind themselves, their heirs, executors, administrators, successors, and assigns to pay to Miami-Dade County, Florida (herein after County) upon default of Principal the penal sum set forth on the face of this Bond.

Principal and Surety agree that the Penal Sum of the Bond is a liquidated damage reasonably estimated to compensate the County for damages suffered as a result of the Principal's default including but not limited to any resulting from delay, procurement costs and incremental costs of contracting.

Default of Principal shall occur in the event that the Principal withdraws Bid within 180 days after bid opening (or any extension thereof agreed to in writing by the Bidder and County); or, after proper notification of intent to Contract from the County, fails to comply with all pre-award requirements including, but not limited to providing Payment and Performance Bonds with good and sufficient surety and the necessary Insurance Certificates pursuant to the Contract Documents, and enter into a written Contract with the County, as may be required; all within 10 days after the prescribed forms are presented to Principal for signature or as otherwise required by the Bidding Documents.

Payment under this Bond will be due and payable upon default of Principal and within 30 calendar days after receipt by Principal and Surety of written notice of default from County, which notice will be given with reasonable promptness, identifying this Bond and the Project.

Surety shall cause to be attached to this Bond a current and effective Power of Attorney evidencing the authority of the officer, agent, or representative who executed this Bond on behalf of Surety to execute, seal, and deliver such Bond and bind the Surety thereby.

CONDITIONS

The Principal has submitted the Bid identified above.

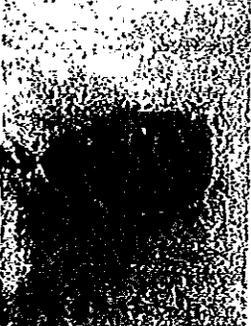
THEREFORE

By executing this Instrument Surety agrees that its obligation is not impaired by any extension(s) of the time for acceptance of the bid that the Principal may grant to the County. Notice to the Surety of extensions is waived. However, waiver of the notice applies only to extensions aggregating not more than 60 calendar days in addition to the period originally allowed for acceptance of the bid. Any changes in or under the Contract Documents and compliance or noncompliance with any formalities connected with the Contract or the changes does not affect Surety's obligation under this Bond.

WITNESS

The Principal and Surety executed this Bond and affixed their seals on the above date. Copy of Resident Agent's current Identification Card as issued by State of Florida Insurance Commissioner must be attached.

	PRINCIPAL H & J Asphalt, Inc.	
SIGNATURE		
NAME AND TITLE (Typed)	Humberto Lorenzo, President	
	SURETY Berkley Insurance Company	
SIGNATURE OF ATTORNEY-IN-FACT		
PRINTED NAME OF ATTORNEY-IN-FACT (Typed)	Michael A. Bonet	
SIGNATURE OF RESIDENT FLORIDA AGENT		
PRINTED NAME OF RESIDENT FLORIDA AGENT (Typed)	Michael A. Bonet	



ALEX SINK
Chief Financial Officer
State of Florida

MICHAEL ANTHONY BONET

License Number A025509

IS LICENSED TO TRANSACT THE FOLLOWING CLASSES OF INSURANCE

General Lines (Prop & Casu) 05/25/1984

RESIDENT
LICENSE



This license was issued under the provisions of the Florida Insurance Code, Chapter 627, Florida Statutes, and is subject to the provisions of the Florida Insurance Code, Chapter 627, Florida Statutes.

BERKLEY INSURANCE COMPANY
WILMINGTON, DELAWARE

NOTICE: The warning found elsewhere in this Power of Attorney affects the validity thereof. Please review carefully.

KNOW ALL MEN BY THESE PRESENTS, that BERKLEY INSURANCE COMPANY (the "Company"), a corporation duly organized and existing under the laws of the State of Delaware, having its principal office in Greenwich, CT, has made, constituted and appointed, and does by these presents make, constitute and appoint: Roy V. Fabry or Michael A. Bonet of Kahn-Carlin & Co., Inc. of Miami, FL its true and lawful Attorney-in-Fact, to sign its name as surety only as delineated below and to execute, seal, acknowledge and deliver any and all bonds and undertakings, with the exception of Financial Guaranty Insurance, providing that no single obligation shall exceed Fifty Million and 00/100 U.S. Dollars (U.S.\$50,000,000.00), to the same extent as if such bonds had been duly executed and acknowledged by the regularly elected officers of the Company at its principal office in their own proper persons.

This Power of Attorney shall be construed and enforced in accordance with, and governed by, the laws of the State of Delaware, without giving effect to the principles of conflicts of laws thereof. This Power of Attorney is granted pursuant to the following resolutions which were duly and validly adopted at a meeting of the Board of Directors of the Company held on January 25, 2010:

RESOLVED, that, with respect to the Surety business written by Berkley Surety Group, the Chairman of the Board, Chief Executive Officer, President or any Vice President of the Company, in conjunction with the Secretary or any Assistant Secretary are hereby authorized to execute powers of attorney authorizing and qualifying the attorney-in-fact named therein to execute bonds, undertakings, recognizances, or other suretyship obligations on behalf of the Company, and to affix the corporate seal of the Company to powers of attorney executed pursuant hereto; and said officers may remove any such attorney-in-fact and revoke any power of attorney previously granted; and further

RESOLVED, that such power of attorney limits the acts of those named therein to the bonds, undertakings, recognizances, or other suretyship obligations specifically named therein, and they have no authority to bind the Company except in the manner and to the extent therein stated; and further

RESOLVED, that such power of attorney revokes all previous powers issued on behalf of the attorney-in-fact named; and further

RESOLVED, that the signature of any authorized officer and the seal of the Company may be affixed by facsimile to any power of attorney or certification thereof authorizing the execution and delivery of any bond, undertaking, recognizance, or other suretyship obligation of the Company; and such signature and seal when so used shall have the same force and effect as though manually affixed. The Company may continue to use for the purposes herein stated the facsimile signature of any person or persons who shall have been such officer or officers of the Company, notwithstanding the fact that they may have ceased to be such at the time when such instruments shall be issued.

IN WITNESS WHEREOF, the Company has caused these presents to be signed and attested by its appropriate officers and its corporate seal hereunto affixed this 22 day of July, 2013.

Attest:

(Seal)

By

Ira S. Lederman
Senior Vice President & Secretary

Berkley Insurance Company

By

Jeffrey M. Hafter
Senior Vice President

WARNING: THIS POWER INVALID IF NOT PRINTED ON BLUE "BERKLEY" SECURITY PAPER.

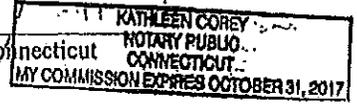
STATE OF CONNECTICUT)

) ss:

COUNTY OF FAIRFIELD)

Sworn to before me, a Notary Public in the State of Connecticut, this 22 day of July, 2013, by Ira S. Lederman and Jeffrey M. Hafter who are sworn to me to be the Senior Vice President and Secretary, and the Senior Vice President, respectively, of Berkley Insurance Company.

Kathleen Corey
Notary Public, State of Connecticut



CERTIFICATE

I, the undersigned, Assistant Secretary of BERKLEY INSURANCE COMPANY, DO HEREBY CERTIFY that the foregoing is a true, correct and complete copy of the original Power of Attorney; that said Power of Attorney has not been revoked or rescinded and that the authority of the Attorney-in-Fact set forth therein, who executed the bond or undertaking to which this Power of Attorney is attached, is in full force and effect as of this date.

Given under my hand and seal of the Company, this 30 day of April, 2014

Andre M. Tuma

void if seal is seen in blue ink. The background imprint, warning and confirmation (on reverse) must be in blue ink. The certification seal at the bottom is embossed.





Miami-Dade County
 Department of Procurement Management
 Affirmation of Vendor Affidavits

In accordance with Ordinance 07-143 amending Section 2-8.1 of the Code of Miami-Dade County, effective June 1, 2008, vendors are required to complete a new Vendor Registration Package, including a Uniform Affidavit Packet (Vendor Affidavits Form), before being awarded a new contract. The undersigned affirms that the Vendor Affidavits Form submitted with the Vendor Registration Package is current, complete and accurate for each affidavit listed below.

Contract No.: 20130281 Federal Employer Identification Number (FEIN): 65-0024320
 Contract Title: Roadway Resurfacing Contract

Affidavits and Legislation/ Governing Body

1. <i>Miami-Dade County Ownership Disclosure</i> Sec. 2-8.1 of the County Code	6. <i>Miami-Dade County Vendor Obligation to County</i> Section 2-8.1 of the County Code
2. <i>Miami-Dade County Employment Disclosure</i> County Ordinance No. 90-133, amending Section 2-8-1(c)(2) of the County Code	7. <i>Miami-Dade County Code of Business Ethics</i> Article 1, Section 2-8.1(f) and 2-11(b)(1) of the County Code through (e) and (g) of the County Code and County Ordinance No 00-1 amending Section 2-11.1(c) of the County Code
3. <i>Miami-Dade County Employment Drug-free Workplace Certification</i> Section 2-8.1.2(b) of the County Code	8. <i>Miami-Dade County Family Leave</i> Article V of Chapter 11 of the County Code
4. <i>Miami-Dade County Disability Non-Discrimination</i> Article 1, Section 2-8.1.5 Resolution R182-00 amending R-385-95	9. <i>Miami-Dade County Living Wage</i> Section 2-8.9 of the County Code
5. <i>Miami-Dade County Debarment Disclosure</i> Section 10.38 of the County Code	10. <i>Miami-Dade County Domestic Leave and Reporting</i> Article 8, Section 11A-6U 11A-67 of the County Code

Humberto Lorenzo
 Printed Name of Affiant

President
 Printed Title of Affiant

[Signature]
 Signature of Affiant
4-29-14
 Date

H & J Asphalt, Inc
 Name of Firm
4310 N W 35 Avenue
 Address
Miami, FL 33142
 City, State, Zip Code

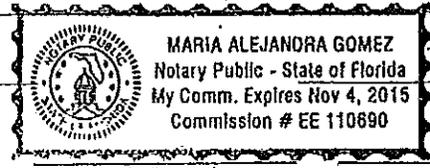
Notary Public Information

Notary Public - State of Florida County of Miami-Dade

Subscribed and sworn to (or affirmed) before me this 29th day of April 2014.

by Humberto Lorenzo He or she is personally known to me or has produced identification

Type of Identification produced
[Signature]
 Signature of Notary Public



Print or Stamp of Notary Public

Expiration Date

Notary Public Seal

COLLUSION AFFIDAVIT

(Code of Miami-Dade County Section 2-8.1.1 and 10-33.1) (Ordinance No. 08-113)

BEFORE ME, A NOTARY PUBLIC, personally appeared Humberto Lorenzo who being duly sworn states: (Insert name of affiant)

I am over 18 years of age, have personal knowledge of the facts stated in this affidavit and I am an owner, officer, director, principal shareholder and/or I am otherwise authorized to bind the bidder of this contract.

I state that the bidder of this contract:

Is not related to any of the other parties bidding in the competitive solicitation, and that the contractor's proposal is genuine and not sham or collusive or made in the interest or on behalf of any person not therein named, and that the contractor has not, directly or indirectly, induced or solicited any other proposer to put in a sham proposal, or any other person, firm, or corporation to refrain from proposing, and that the proposer has not in any manner sought by collusion to secure to the proposer an advantage over any other proposer.

OR is related to the following parties who bid in the solicitation which are identified and listed below:

Note: Any person or entity that fails to submit this executed affidavit shall be ineligible for contract award. In the event a recommended contractor identifies related parties in the competitive solicitation its bid shall be presumed to be collusive and the recommended contractor shall be ineligible for award unless that presumption is rebutted by presentation of evidence as to the extent of ownership, control and management of such related parties in the preparation and submittal of such bids or proposals. Related parties shall mean bidders or proposers or the principals, corporate officers, and managers thereof which have a direct or indirect ownership interest in another bidder or proposer for the same agreement or in which a parent company or the principals thereof of one (1) bidder or proposer have a direct or indirect ownership interest in another bidder or proposer for the same agreement. Bids or proposals found to be collusive shall be rejected.

By: [Signature] Date 04-29 2014
Signature of Affiant

Humberto Lorenzo - President 615-010124132101
Printed Name of Affiant and Title Federal Employer Identification Number

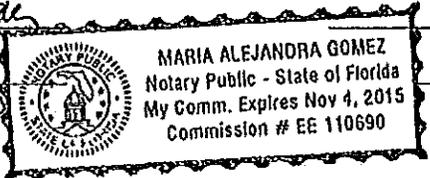
H & J Asphalt, Inc. Printed Name of Firm
4310 N W 35 Avenue
Miami, FL 33142 Address of Firm

SUBSCRIBED AND SWORN TO (or affirmed) before me this 29th day of April 2014

He/She/It is personally known to me/ or has presented _____ as identification. Type of Identification

[Signature] Signature of Notary

Print or Stamp Name of Notary



Serial Number

Expiration Date

Notary Public - State of _____

Notary Seal

FAIR WAGE AFFIDAVIT

Before me, the undersigned authority appeared Humberto Lorenzo
(print name), the President (print title) of
H&J Asphalt, Inc (print name of Bidder or Proposer), who attests
that H&J Asphalt, Inc. (print name of bidder or proposer)
shall pay workers on the project minimum wages rates in accordance with
Section 2-11.16 of the Miami-Dade County Code, and the Labor Provisions of the
contract documents.

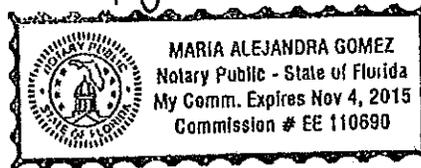
STATE OF FLORIDA)

SS

COUNTY OF DADE)

The foregoing instrument was acknowledged before me this 29th day of
April, 2014, HUMBERTO LORENZO on behalf of
H & J ASPHALT, INC., who is personally known to
me/or has produced _____, as identification and
who [] did [] did not take an oath.

Maria Alejandra Gomez



**THIS FORM MUST BE COMPLETED
SCHEDULE OF INTENT AFFIDAVIT
COMMUNITY SMALL BUSINESS ENTERPRISE PROGRAM**

Name of Prime Contractor Firm H & J Asphalt, Inc. Contact Person Amberto Horvath
 Address 4310 NW 35 Ave. Miami, FL 33142 Phone 305-434-3372 Fax 305-434-3313
 Project Name Roadway Rehabilitation Contract Project Number 20130281
 CSBE Contract Measure Trade Set-aside

This form must be completed by the Prime Contractor and the CSBE Subcontractor that will be utilized for scopes of work on the project. Bidders must include this form in a separate envelope at the time of bid submission. This form must also include the percentage for CSBE make-up, if applicable.

Name of Prime Contractor	Certification No. (if applicable)	Certification Expiration Date (if applicable)	Type of CSBE work to be performed by Prime Contractor	Prime Contractor % of Bid
<u>H & J Asphalt</u>			<u>Paving, Milling</u>	<u>83.50</u>
Prime Contractor Total Percentage:				

The undersigned intends to perform the following work in connection with the above contract:

Name of Subcontractor	Certification No.	Certification Expiration Date	CSBE Make-Up		Type of CSBE work to be performed by Subcontractor	Subcontractor % of Bid CSBE	Make-Up % of Bid
			Yes	No			
<u>AMERICAN BUILDERS MASTERS</u>	<u>65231</u>	<u>3-31-16</u>			<u>CONCRETE</u>	<u>16.50</u>	
Subcontractor Total Percentage:							

I certify that the representations contained in this form are to the best of my knowledge true and accurate.
 Prime Signature: [Signature] Prime Print Name: Amberto Horvath Prime Print Title: President Date: 4-23-14

The undersigned has reasonably uncommitted capacity sufficient to provide the required goods or services, all licenses and permits necessary to provide such goods or services, ability to obtain bonding that is reasonably required to provide such goods or services consistent with normal industry practice, and the ability to otherwise meet the bid specifications.
 Subcontractor Signature: [Signature] Subcontractor Print Name: Jose Benitez Subcontractor Print Title: President Date: 4/23/14

Check this box if this project is a set-aside and you are performing 100% of the work with your own work forces.

Check this box if Form DBD 305A and Form DBD 305B have been submitted in your pricing envelope.

**THIS FORM MUST BE COMPLETED
SCHEDULE OF INTENT AFFIDAVIT
COMMUNITY SMALL BUSINESS ENTERPRISE PROGRAM.**

Name of Prime Contractor Firm H & J Asphalt, Inc. Contact Person Humberto Lozano
 Address 4319 N W 35th Ave Miami FL 33142 Phone 305-634-5342 Fax 305-634-3313
 Project Name ROADWAY PAVEMENT CONTRACT Project Number 20130281
 CSBE Contract Measure TRAK 305-A-SIDE

This form must be completed by the Prime Contractor and the CSBE Subcontractor that will be utilized for scopes of work on the project. Bidders must include this form in a separate envelope at the time of bid submission. This form must also include the percentage for CSBE make-up, if applicable.

Name of Prime Contractor	Certification No. (if applicable)	Certification Expiration Date (if applicable)	Type of CSBE work to be performed by Prime Contractor	Prime Contractor % of Bid
<u>H & J Asphalt, Inc</u>			<u>PAVING, MILLING</u>	<u>83.50</u>
Prime Contractor Total Percentage:				

The undersigned intends to perform the following work in connection with the above contract:

Name of Subcontractor	Certification No.	Certification Expiration Date	CSBE Make-Up		Type of CSBE work to be performed by Subcontractor	Subcontractor % of Bid CSBE	Make-Up % of Bid
			Yes	No			
<u>ROADWAY PAVING</u>	<u>12597</u>	<u>2-9-15</u>			<u>STRIPING</u>	<u>10%</u>	
Subcontractor Total Percentage:							

I certify that the representations contained in this form are to the best of my knowledge true and accurate.

Prime Signature [Signature] Prime Print Name JOSEPH RUIZ Date April 28, 2014
 Sub-Contractor [Signature] Sub-Contractor Print Name Sub-Contractor

The undersigned has reasonably uncommitted capacity sufficient to provide the required goods or services, all licenses and permits necessary to provide such goods or services, ability to obtain bonding that is reasonably required to provide such goods or services consistent with normal industry practices, and the ability to otherwise meet the bid specifications.

Subcontractor Signature [Signature] Subcontractor Print Name Humberto Lozano Date 4-29-14
 Subcontractor Print Title President

- Check this box if this project is a set-aside and you are performing 100% of the work with your own work forces.
- Check this box if Form DBD 305A and Form DBD 305B have been submitted in your pricing envelope.

MIAMI-DADE COUNTY
PUBLIC WORKS AND WASTE MANAGEMENT DEPARTMENT (PWWM)

ADDENDUM NO. 2
March 25, 2014

PROJECT: Roadway Resurfacing Contract
Project No. 20130281 (MCC 7360)

BID DUE DATE: April 30, 2014; 2:00 P.M.

FROM: Miami-Dade County PWWM
Contracts and Specifications Section
111 NW First Street, 14th Floor
Miami, FL 33128
305.375.2930

TO: Prospective Bidders and Interested Parties

This Addendum forms part of the project solicitation documents and will be incorporated into the Contract Documents, as applicable. Insofar as the Original Contract Documents, Drawings and Specifications are inconsistent, this Addendum shall govern. Please acknowledge receipt of this Addendum, at the time of bid submittal to Miami-Dade County, in the space provided on the "Acknowledgement of Addenda Form" provided with the project solicitation documents. Failure to acknowledge receipt of all addenda may be cause for disqualification.

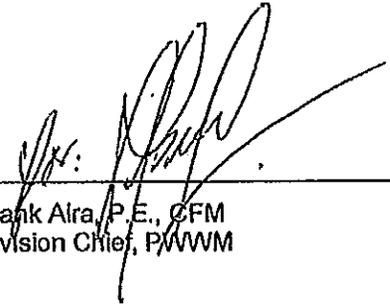
CHANGES TO: Section 3, Supplementary Instructions to Bidders

1. Delete the language in its entirety and Replace with the following attachment.

CHANGES TO: Appendix B to the Supplementary Conditions

1. Delete the Small Business Division, Project Worksheet and Replace with the following attachment.

END OF ADDENDUM NO. 2



Frank Alra, P.E., CFM
Division Chief, PWWM

c: PWWM, Luis O. Pérez, P.E., PWWM, Joaquin Rabassa, P.E., PWWM, Bassam Moubayed, PWWM, Duane Kopp, PWWM, Ultimo de Oliveira, ISD, Clerk of the Board, Project File

CONTRACT EXHIBIT "A"

ROADWAY RESURFACING IMPROVEMENTS
Town of Cutler Bay, Florida
Town Project No. ITB #13-09

BID FORM

Bid unit prices stated in this proposal include all costs and expenses for labor, equipment, materials, contractor's overhead and profit. Unit prices for the various work items are intended to establish a total price for completing the project in its entirety. The Contractor shall include in the Bid price any work item and materials for which a separate pay item has not been included in the Bid Form. All work and incidental costs shall be included for payment under the several scheduled items of the overall contract, and no separate payment will be made therefore. It is the intent of the Town to spend \$600,000 on resurfacing and \$300,000 on sidewalk repairs annually. These amounts are subject to change. The work is being funded in part through the People's Transportation Plan (PTP).

ITEM	DESCRIPTION	QUANTIT Y	UNIT	UNIT PRICE	AMOUNT
<i>General Items</i>					
101-1	Mobilization	1	L.S.	\$.01	\$.01
102-1	Maintenance of Traffic	1	L.S.	\$.01	\$.01
<i>Sub-Total - General Items</i>		\$ <u>.02</u>			
<i>Roadway Items</i>					
337	Type S-III Asphalt Overlay (1" thick)	1	S.Y.	\$ 7.79	\$ 7.79
337	Type S-III Asphalt Overlay (1" thick)	1	TN.	\$ 144. ⁰⁰	\$ 144. ⁰⁰
339-1	Type S-III Asphalt Leveling Course	1	TN.	\$ 154. ⁰⁰	\$ 154. ⁰⁰
327-70-1	Asphalt milling (1" depth)	1	S.Y.	\$ 6.49	\$ 6.49
425-6	Adjust existing valve box	1	EA.	\$ 125. ⁰⁰	\$ 125. ⁰⁰
425-5	Adjust existing manhole ring and cover	1	EA.	\$ 225. ⁰⁰	\$ 225. ⁰⁰

339-1	Remove and reconstruct existing asphalt apron with 1-1/2" type S-III asphalt	1	EA.	\$ 295. ⁰⁰	\$ 295. ⁰⁰
711-11125 711-11211 706-3	24" white thermoplastic stop bar with 50 feet of double yellow, including 6 yellow RPMs	1	EA.	\$ 155. ⁰⁰	\$ 155. ⁰⁰
711-11111	Standard 6" white thermoplastic	1	L.F.	\$ 1. ⁵⁰	\$ 1. ⁵⁰
711-11123	Standard 12" white thermoplastic	1	L.F.	\$ 2. ⁵⁰	\$ 2. ⁵⁰
711-11125	Standard 24" white thermoplastic	1	L.F.	\$ 6. ⁰⁰	\$ 6. ⁰⁰
711-11211	Standard 6" yellow thermoplastic	1	L.F.	\$ 2. ⁰⁰	\$ 2. ⁰⁰
711-11224	Standard 18" yellow thermoplastic	1	L.F.	\$ 3. ⁵⁰	\$ 3. ⁵⁰
711-11170	Standard thermoplastic arrow	1	EA.	\$ 175. ⁰⁰	\$ 175. ⁰⁰
706-3	White/red RPMs	1	EA.	\$ 4. ⁵⁰	\$ 4. ⁵⁰
706-3	Blue RPMs	1	EA.	\$ 5. ⁵⁰	\$ 5. ⁵⁰
706-3	Yellow RPMs	1	EA.	\$ 4. ⁵⁰	\$ 4. ⁵⁰
663	Traffic Loop Replacement	1	EA.	\$ 100. ⁰⁰	\$ 100. ⁰⁰
<u>Sub-Total - Roadway Items</u>				\$ 1,417.28	
<u>Sidewalk Items</u>					
522-1	Construct new or replace existing 4" thick 5' wide sidewalk (includes removal, disposal, debris removal, root pruning, preparation and restoration)	1	L.F.	\$ 42. ⁰⁰	\$ 42. ⁰⁰
522-2	Construct new or replace existing 6" thick 5' wide sidewalk (includes removal, disposal, debris removal, root pruning, preparation and restoration)	1	L.F.	\$ 43. ⁰⁰	\$ 43. ⁰⁰
110-15-1	Bio-barrier installation (per sidewalk flag)	1	EA.	\$ 20. ⁰⁰	\$ 20. ⁰⁰
522-1	Installation of 5'x5' handicap ramps @ existing sidewalk - including ADA detectable warning surface (4' x 2' @ each) (includes restoration). See detail "A" in Appendix B	1	EA.	\$ 275. ⁰⁰	\$ 275. ⁰⁰

522-1	Installation of handicap ramps @ new sidewalk – including ADA detectable warning surface (4' x 2' @ each) (includes restoration)	1	EA.	\$ 275. ⁰⁰	\$ 275. ⁰⁰
Survey	R.O.W. survey (to establish property line)	1	L.F.	\$ 10. ⁰⁰	\$ 10. ⁰⁰
520-1-10	Concrete curb and gutter (Type "F") (Includes Demo & Disposal of Damaged Curbs If Required)	1	L.F.	\$ 19. ⁰⁰	\$ 19. ⁰⁰
520-2-4	Concrete curb (Type "D") (Includes Demo & Disposal of Damaged Curbs If Required)	1	L.F.	\$ 15. ⁰⁰	\$ 15. ⁰⁰
550	Fence Relocation (chain link)	1	L.F.	\$ 5. ⁰⁰	\$ 5. ⁰⁰
590-70-1	Irrigation system restoration: Schedule 40 PVC Pipe	1	L.F.	\$ 7. ⁰⁰	\$ 7. ⁰⁰
	Rainbird / Swing Joints	1	EA.	\$ 20. ⁰⁰	\$ 20. ⁰⁰
1080	Replace existing meter boxes (as directed)	1	EA.	\$ 200. ⁰⁰	\$ 200. ⁰⁰
522-2	Storm Drain Concrete Apron Construct New or Replace 6" Thick Concrete Apron. (Includes Removal, Disposal, Debris Removal, Root Pruning, Preparation, Restoration, and Saw Cutting.	1	SF.	\$ 5.25	\$ 5.25
<u>Sub-Total – Sidewalk Items</u>				\$ 936.25	

GRAND TOTAL IN FIGURES:

\$ 2,353.55

GRAND TOTAL WRITTEN:

Two thousand three hundred fifty three and 5/4

BIID

DER: Enviro Waste Services Corp Inc

By: Eduardo Barba

Title: President

Telephone: 305-637-9665

Fax: 305-637-9659

Bid Form
Page 4 of 7
MISCELLANEOUS STREET RESURFACING SERVICES

BID ITEM NO.	DESCRIPTION	UNIT	TOTAL COST (\$)
MSR-1	Asphaltic Concrete (Type S; 1" Thick)	Ton	\$ 110. ⁰⁰
MSR-2	Milling Existing Pavement [(1" Payment for greater cuts will be paid proportionately)]	Square Yards	\$ 2.50
MSR-3	Adjust Manhole (This item is contingent upon field conditions and may be increased, decreased or eliminated by the engineer)	Each	\$ 350. ⁰⁰
MSR-4	Adjust existing valve boxes (This item is contingent upon field conditions and may be increased, decreased or eliminated by the engineer)	Each	\$ 300. ⁰⁰
MSR-5	Reflective Pavement Markers (Class B; Mono or Bi-Directional, all colors)	Each	\$ 2.85
MSR-6	Temporary Pavement Marking (Directional Arrows)	Each	\$ 25. ⁰⁰
MSR-7	Thermoplastic (Directional Arrows)	Each	\$ 45. ⁰⁰
MSR-8	Temporary Pavement Marking (White/Yellow; Solid; 6")	Each	\$ 0.20
MSR-9	Thermoplastic (White/Yellow; Solid; 6")	Each	\$ 0.50
MSR-10	Temporary Pavement Marking (White; Solid; 8")	Each	\$ 0.30
MSR-11	Thermoplastic (White; Solid; 8")	Each	\$ 0.85
MSR-12	Temporary Pavement Marking (White; Solid; 12")	Each	\$ 0.50
MSR-13	Thermoplastic (White; Solid; 12")	Each	\$ 1.35
MSR-14	Temporary Pavement Marking (White/Yellow; Solid; 18")	Each	\$ 0.80
MSR-15	Thermoplastic (White/Yellow; Solid; 18")	Each	\$ 1.45
MSR-16	Temporary Pavement Marking (White; Solid; 24")	Each	\$ 1.00
MSR-17	Thermoplastic (White; Solid; 24")	Each	\$ 2.55
MSR-18	Temporary Pavement Marking Skip Traffic Stripe (4" White/Yellow; 6'-10' Skip)	Each	\$ 0.18
MSR-19	Thermoplastic Skip Traffic Stripe (4" White/Yellow; 6'-10' Skip)	Each	\$ 0.55
MSR-20	Temporary Pavement Marking Skip Traffic Stripe (4" White/Yellow; 10' Stripe; 30' Skip)	Each	\$ 0.18
MSR-21	Thermoplastic Skip Traffic Stripe (4" White/Yellow; 10' Stripe; 30' Skip)	Each	\$ 0.55
MSR-22	Thermoplastic Skip Traffic Stripe (4" White/Yellow)	Each	\$ 0.18

Bid Form
 Page 5 of 7

MISCELLANEOUS STREET RESURFACING SERVICES

BID ITEM NO.	DESCRIPTION	UNIT	TOTAL COST (\$)
MSR-23	Temporary Pavement Marking Skip Traffic Stripe (6" White/Yellow; 10' Stripe; 30' Skip)	Each	\$ 0.20
MSR-24	Thermoplastic Skip Traffic Stripe (6" White/Yellow; 10' Stripe; 30' Skip)	Each	\$ 0.55
MSR-25	Re-Grade Existing Swale (Without Sod; when required by the Engineer)	Square Yards	\$ 5.00
MSR-26	Removal of existing pavement	Square Yards	\$ 5.00
MSR-27	Regular Excavation	Cubic Yards	\$ 5.00
MSR-28	Borrow Excavation (Contractor supplied, truck measurement; This item is contingent upon field conditions and may be increased, decreased, or eliminated by the Engineer)	Cubic Yards	\$ 9.00
MSR-29	Embankment for Road Build-up (Borrow material from Contractor's own source)	Cubic Yards	\$ 8.50
MSR-30	Embankment material for shoulder (Borrow material from Contractor's own source)	Cubic Yards	\$ 8.50
MSR-31	Sodding (Pensacola Bahia or match existing; includes watering)	Square Yards	\$ 3.50
MSR-32	Reset Existing Post and Sign	Each	\$ 220. ⁰⁰
MSR-33	36" Tubular Delineator	Each	\$ 7.00
MSR-34	Lime Rock Base	Square Yard	\$ 16.00
MSR-35	Response Time	Hours/Minutes	10 Hours

IMPORTANT NOTE:

- THE MISCELLANEOUS SERVICES LISTED ABOVE MAY BE REQUESTED THROUGHOUT THE LENGTH OF THIS (2011-PW-103) CONTRACT.

RESOLUTION NO. _____

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA; APPOINTING THE BOARD OF DIRECTORS OF THE PALMETTO BAY FOUNDATION, INC. (PBFI) DUE TO THE CHANGE IN THE COMPOSITION OF THE VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, THE SINGLE MEMBER OF PBFI; PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Village of Palmetto Bay village council is the sole member "member" of the Palmetto Bay Foundation, Inc.; and

WHEREAS, the records should reflect the change in the PBFI board of directors.

NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND THE VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, AS FOLLOWS:

Section 1. The Village Council of the Village of Palmetto Bay hereby appoints the following members to the Board of Directors of the Palmetto Bay Foundation, Inc.:

- Eugene Flinn
- John DuBois
- Karyn Cunningham
- Tim Schaffer
- Larissa Siegel Lara

Section 2. This resolution shall take effect immediately upon enactment.

PASSED and ADOPTED this _____ day of March, 2015.

Attest: _____

<p>Meighan Alexander Village Clerk</p>	<p>_____ Eugene Flinn Mayor</p>
--	---

APPROVED AS TO FORM AND LEGAL SUFFICIENCY FOR THE USE AND RELIANCE OF THE VILLAGE OF PALMETTO BAY ONLY:

Dexter W. Lehtinen
Village Attorney

1
2 FINAL VOTE AT ADOPTION:
3
4 Council Member Karyn Cunningham _____
5
6 Council Member Tim Schaffer _____
7
8 Council Member Larissa Siegel Lara _____
9
10 Vice-Mayor John DuBois _____
11
12 Mayor Eugene Flinn _____



To: Honorable Mayor and Village Council

Date: February 23, 2015

From: Ron E. Williams, Village Manager

Re: Title VI Compliance Program
Policy

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, APPROVING A TITLE VI PROGRAM POLICY FOR THE PURPOSE OF ENSURING COMPLIANCE WITH TITLE VI OF THE CIVIL RIGHTS ACT PURSUANT TO THE CIVIL RIGHTS ACT OF 1964 AND THE CIVIL RIGHTS RESTORATION ACT OF 1987; APPROVING THE ASSOCIATED LIMITED ENGLISH PROFICIENCY PLAN; AND FURTHER AUTHORIZING THE VILLAGE MANAGER TO SUBMIT THE POLICY DOCUMENTS TO MIAMI-DADE TRANSIT AUTHORITY FOR INCLUSION IN THEIR TITLE VI PROGRAM ON BEHALF OF THE VILLAGE OF PALMETTO BAY; AND PROVIDING FOR AN EFFECTIVE DATE. (Administration)

BACKGROUND AND ANALYSIS

The Federal Transportation Administration (FTA) is one of ten operating administrations within the Department of Transportation (DOT). The Federal Government, through FTA, provides financial assistance to develop new transit systems and improve, maintain, and operate existing systems. FTA oversees thousands of grants to hundreds of State and local transit providers. These grant recipients are responsible for managing their programs in accordance with Federal requirements, and FTA is responsible for ensuring that recipients follow Federal statutory and administrative requirements. One of these requirements is the Civil Rights Act of 1964 regarding anti-discrimination and the subsequent amendments to the Act.

The Miami-Dade Transit Authority (MDTA) is a direct recipient of Federal Funding through the Federal Transportation Administration (FTA). The Village of Palmetto Bay is the sub-recipient of Federal Funding through MDTA. Both entities must be in compliance at all times with Title VI of the Civil Rights Act of 1964 which protects people from discrimination based on race, color or national origin in programs or

activities that receive federal financial assistance.

Compliance requires periodic updates to the existing Title VI Program documents. Staff received notification from MDTA that the Village of Palmetto Bay was non-compliant with FTA Circular C 4702.1B. The document is 130 pages long and includes the following:

1. Clear guidance for grantees on the relationship between reporting requirements and DOT's Title VI regulation.
2. Describes what grantees must include in their Title VI programs.
3. Adds approximately 40 pages of Appendices to provide examples to grantees.
4. Includes graphs, sample forms, and flow charts.
5. New Title VI Program must be submitted every three years even if the Program has not changed.
6. Title VI Program must be approved by the Governing Body.
7. Grantees must upload updated Title VI Programs 30 days before the existing Program expires.
8. Notice of Rights Under Title VI
9. Complaint Procedures & Complaint Form
10. Investigations, Complaints and Lawsuits
11. Language Assistance Plan

The procedures are required so people who think they may have experienced discrimination can better understand how to file a complaint, where the forms can be found, and what they can expect as an investigation moves forward. In addition, a Language Assistance Plan is incorporated to ensure that people who speak a different language than English can still understand the process to file a complaint.

Staff has prepared this Title VI compliance document in accordance with the Circular in order to comply with all elements of Title VI of the Civil Rights Act of 1964. The sub-recipient Title VI Program documents, if approved by the Village Council, must then be submitted to the recipient MDTA so they can incorporate them into their Title VI Program documents. The document has been reviewed by MDTA for completeness and has been approved for submittal to the MDTA once it is approved by the Village Council.

The Village of Palmetto Bay has not been named in any Title VI complaint or investigation. It is recommended that the Village Council adopt the attached Title VI Program that protects people from discrimination based on race, color or national origin when they are using public transportation as ordered by the Federal Transportation Administration in accordance with the Civil Rights Act of 1964 and the recently issued Circular C 4702.1B and authorizing staff to submit the approved documents to Miami-Dade Transit Authority (MDTA) the direct recipient of Federal Transportation Administration Funds for inclusion in their Title VI Program.

FISCAL/BUDGETARY IMPACT

None.

RECOMMENDATION

Approval is recommended.

1 RESOLUTION NO. _____
2

3 A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE
4 VILLAGE OF PALMETTO BAY, FLORIDA, APPROVING A TITLE VI
5 PROGRAM POLICY FOR THE PURPOSE OF ENSURING
6 COMPLIANCE WITH TITLE VI OF THE CIVIL RIGHTS ACT
7 PURSUANT TO THE CIVIL RIGHTS ACT OF 1964 AND THE CIVIL
8 RIGHTS RESTORATION ACT OF 1987; APPROVING THE
9 ASSOCIATED LIMITED ENGLISH PROFICIENCY PLAN; AND
10 FURTHER AUTHORIZING THE VILLAGE MANAGER TO SUBMIT
11 THE POLICY DOCUMENTS TO MIAMI-DADE TRANSIT
12 AUTHORITY FOR INCLUSION IN THEIR TITLE VI PROGRAM ON
13 BEHALF OF THE VILLAGE OF PALMETTO BAY; AND PROVIDING
14 FOR AN EFFECTIVE DATE. (Administration)

15
16 WHEREAS, the Village of Palmetto Bay is a sub-recipient of Federal Transportation
17 Administration funding through Miami-Dade Transit Authority (MDTA); and
18

19 WHEREAS, Title VI documents are required to be in compliance with the Civil
20 Rights Act of 1964; and
21

22 WHEREAS, staff created a Title VI Program Policy in accordance with Circular C
23 4702.1B ensuring protection of people from discrimination based on race, color or national origin
24 in programs or activities that receive federal financial assistance; and
25

26 WHEREAS, the draft documents were reviewed by MDTA for completeness and
27 found to be complete and ready for submittal; and
28

29 WHEREAS, the Program documents must be approved by the Village Council of the
30 sub-recipient and submitted to the MDTA for inclusion in their Title VI Program;
31

32 NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND VILLAGE
33 COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, AS FOLLOWS:
34

35 Section 1: The Village Council hereby accepts the Title VI Program and authorizes the
36 Village Manager to submit the Program documents to Miami-Dade County Transit Authority for
37 inclusion in their Title VI Program.
38

39 Section 2: This resolution shall take effect immediately upon approval.
40

41 PASSED and ADOPTED this _____ day of March 2015.
42

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28

Attest: _____
Meighan J. Alexander
Village Clerk

Eugene Flinn
Mayor

APPROVED AS TO FORM AND LEGAL SUFFICIENCY FOR THE USE
AND RELIANCE OF THE VILLAGE OF PALMETTO BAY, FLORIDA ONLY:

Dexter W. Lehtinen
Village Attorney

FINAL VOTE AT ADOPTION:

Council Member Karyn Cunningham _____
Council Member Tim Schaffer _____
Council Member Larissa Siegel Lara _____
Vice-Mayor John DuBois _____
Mayor Eugene Flinn _____



VILLAGE OF PALMETTO BAY

(NON-DISCRIMINATION)

TITLE VI PROGRAM PLAN

Circulator Service



February 2015

Village of Palmetto Bay
Public Works Department

9495 SW 180TH Street

Palmetto Bay, FL 33157

Tel: 305-259-1234

Fax: 305-259-1290

Website: www.palmettobay-fi.gov

Table of Contents

<u>I.</u>	Circulator Service Overview.....	1
<u>II.</u>	The Village's Policy Statement	1-2
	Guideline	
	Procedure	
	Background	
	Statutory Authorities	
<u>III.</u>	Title VI Notice to the Public.....	3
<u>IV.</u>	Title VI Definitions.....	4
<u>V.</u>	Title VI Complaint Procedure and Complaint Form	5-6
<u>VI.</u>	Subcontracts and Vendors.....	6
<u>VII.</u>	Record Keeping of Investigations, Complaints or Lawsuits	7
<u>VIII.</u>	Website Location of Title VI notice, Procedure and Form	7
<u>IX.</u>	Limited english Proficiency (LEP) Analysis	8
<u>X.</u>	Public Participation / Outreach Plan.....	9-10
<u>XI.</u>	Employee Education.....	10
<u>XII.</u>	Service Standards	11
	A. Vehicle Load	
	B. Service Availability and Vehicle On-Time Performance	
<u>XIII.</u>	Service Policies	12
	A. Transit Amenities	
	B. Vehicle Assignment	
<u>XIV.</u>	Language Assistance Plan	12
<u>XV.</u>	Make up of Transit Related, Non-Elected Advisory Committees	12

Table of Contents (cont.)

Appendix A- Notice of Rights Under Title VI of the Civil Rights Act of 1964..... 13

Appendix B- Employee Education Form- Title VI Program..... 14

Appendix C- Acknowledgement of Receipt of Title VI Plan..... 15

Appendix D- Title VI Complaint Procedure..... 16

Appendix E- Title VI Complaint Form.....17-20

Appendix F- Letter Acknowledging Receipt of Complaint.....21

Appendix G- Letter notifying complainant that the
Complaint is Substantiated.....22

Appendix H- Letter notifying complainant that the
Complaint is NOT Substantiated.....23

Appendix I- Village Log of transportation Related Title VI Investigations
Complaints and Lawsuits.....24-27

Complaint Monitoring
Investigation Monitoring
Lawsuit Monitoring

Appendix J- IBus Information Brochure.....28-32

Appendix K- Language Assistance Plan (LAP) February, 2015..... 33-36

Introduction
Demographic
Language Assistance Service
Notification to LEP Individuals
Public Participation and Outreach
Staff Training
Training Materials
Monitoring and Updating of the LAP
Contact Information

I. Circulator Service Overview

The Village of Palmetto Bay provides a free circulator service and operates two (2) fixed local circular routes within the Village. The Village bus service provides public transportation to parks within the boundaries of the Village and connects to the busway located outside of the Village's limits. The IBUS is the only public transportation within the Village that links riders to the Miami-Dade Busway and Metrorail service. Riders making connection to Miami-Dade Transit are expected to pay the appropriate fares at time of transfer. There is no fare when using the Village IBUS service. A map depicting the two (2) routes is provided in **(Appendix J)**.

II. Policy Statement

Title VI of the Civil Rights Act of 1964 prohibits discrimination on the basis of race, color, or national origin in programs and activities receiving Federal financial assistance. Specifically, Title VI provides that "no person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance" (42 U.S.C. Section 2000d).

The Village of Palmetto Bay is committed to ensuring that no person is excluded from participation in, or denied the benefits of its transit services on the basis of race, color, or national origin, as protected by Title VI in Federal Transit Administration (FTA) Circular 4702.1.A.

This plan was developed to guide the Village of Palmetto Bay in its administration and management of Title VI-related activities.

Guideline:

- A. Nondiscrimination programs require that Federal-aid recipients, sub-recipients, and contractors prevent discrimination and ensure nondiscrimination in all of their programs and activities, whether those programs and activities are federally-funded or not.
 - 1. If a unit of a State or local government is extended Federal-aid and distributes such aid to another governmental entity, all of the operations of the recipient and sub-recipient are covered.
 - 2. Corporations, partnerships, or other private organizations or sole proprietorships covered in their entirety if such entity received Federal financial assistance (FHWA Notice N 4720.6, September 2, 1992).

- B. The Village of Palmetto Bay as a recipient of federal financial assistance will ensure full compliance with Title VI of the Civil Rights Act of 1964.

Procedure:

Any person who believes that he or she has, individually, or as a member of any specific class of persons, been subjected to discrimination on the basis of race, color, national origin, sex, age, or handicap/disability may file a confidential Title VI complaint with the Village of Palmetto Bay. Any and all complaints related to this policy should be forwarded to the Office of the Village Manager or his designee charged with the overall responsibility for the administration of this policy 9705 E. Hibiscus Street, Palmetto Bay, FL 33157.

Background:

Title VI of the Civil Rights Act of 1964, as amended, provides that no person shall on the grounds of race, color, national origin, sex, age, and handicap/disability, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance. The Civil Rights Restoration Act of 1987 amended Title VI to specify that entire institutions receiving Federal funds -whether schools and colleges, government entities, or private employers -must comply with Federal civil rights laws, rather than just the particular programs or activities that receive the funds.

Statutory Authorities:

Title VI of the Civil Rights Act of 1964, The Civil Rights Restoration Act of 1987, Executive Order 12250, Executive Order 12898 (Environmental Justice), Executive Order 13166 (Limited English Proficiency), 49 CFR Part 21 and 23 CFR Part 200.

Any questions regarding this policy should be directed to:

Village of Palmetto Bay, Office of the Village Manager, 9705 E. Hibiscus Street, Palmetto Bay, FL 33157, Telephone: (305) 259-1234 Fax: (305) 259-1290.

III. Title VI Notice to the Public

The Village of Palmetto Bay maintains a proactive, interdisciplinary approach to Title VI, requiring that decision makers of the Village fully implement Title VI in all business decisions. The Village has adopted a "Notice of Rights under Title VI of the Civil Rights Act of 1964" in connection with its circulator service. The notice is posted on the Village's website: palmettobay-fl.gov in English and Spanish. The notice contains a telephone number for individuals to contact in the event that he/she needs information in another language. A copy of the notice is attached as (Appendix A).

In addition to the website, the notice is prominently and publicly displayed in each bus and in all Village owned facilities and each office where Title VI is applicable. An individual may also request a copy of the notice from the Office of the Village Manager. Additional information relating to the Village's nondiscrimination obligation is provided in this document.

Further information can be obtained directly from the designated Title VI representative from the Office of the Village Manager.

Village of Palmetto Bay
Office of the Village Manager
9705 E. Hibiscus Street, Palmetto Bay, FL 33157
Telephone: (305) 259-1234 Fax: (305) 259-1290

IV. Title VI Definitions

Title VI requires that all FL/DOT programs; benefits, activities and services occur without discrimination on the basis of race, color, national origin, or sex and with active inclusion of protected class persons. (The term benefit includes doing business with FL/DOT and encompasses all FL/DOT contracting and purchasing.).

TITLE VI: "No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity receiving Federal financial assistance." **Section 601 of the Civil Rights Act of 1964**

Simple Justice requires that public funds to which all taxpayers of all races contributes, not be spent in any fashion which encourages, entrenches, subsidizes, or results in racial discrimination.

-President John F. Kennedy

Also a part of Title VI is:

Environmental Justice – Each Agency shall make achieving environmental justice part of its mission by identifying and addressing, as appropriate, disproportionately high and adverse human health or environmental effects of its programs, policies, and activities on minority and low-income populations." **Executive Order 12898**

Limited English Proficiency (LEP) – Each agency shall prepare a plan to improve access to its federally conducted programs and activities by eligible LEP persons. Each plan shall include the steps the agency will take to ensure that eligible LEP persons can meaningfully access the agency's programs and activities. **Executive Order 13166**

V. Title VI Complaint Procedure and Complaint Form

The Village is committed to its Title VI Policy, and Title VI Nondiscrimination Program to ensure that no person or groups of persons shall, on the grounds of race, color, sex, age, national origin, or disability be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any and all programs, services, or activities administered by the Village, its recipients, sub recipients and contractors. In addition, Executive Order 12898 (Environmental Justice) prohibits discrimination based on income status.

If an individual believes he or she has been discriminated against on the basis of race, color or national origin in connection with the Village's circulator service, the individual may file a complaint by completing and submitting a Title VI Complaint Form to the Office of the Village Manager no later than 180 days after the date of the alleged discrimination. Each complaint should include the following information:

- Full name
- Mailing address
- Contact Information (i.e., telephone number, email address, etc.)
- How, when, where and why you believe you were discriminated against, including location, names and contact information of any witnesses
- Other information that you consider significant

All complaints will be handled in accordance with the Village's Title VI Complaint Procedure.

Also included in this Plan is the **Village's Title VI Complaint Procedure** which outlines the process to follow for any individual or group that may feel that they have been denied the benefits of, or otherwise subjected to discrimination under any and all programs, services, or activities administered by Village, its recipients, sub recipients and contractors. It also explains the Village's authority and responsibilities in regards to responding to and acting upon their complaint. This document also describes enforcement procedures to be followed by the FHWA in the event of the Village's noncompliance with Title VI.

There is a form that the Village utilizes to document any complaints in regards to Title VI – the **Village of Palmetto Bay Title VI Complaint Form**. The Complaint Procedure and Complaint Form are available on the Village's website and upon request from the Office of the Village Manager. The Complaint Form is a .pdf file that can be printed and submitted via email, fax, mail, or in person to the Office of the Village Manager.

Additionally, the Village shall make every effort to address all complaints in an expeditious and thorough manner. A letter acknowledging receipt of complaint will be mailed within seven days (see **Appendix F**). Please note that in responding to any requests for additional information, a complainant's failure to provide the requested information may result in the administrative closure of the complaint.

The Village of Palmetto Bay will send a final written response letter (see **Appendix G**) to the complainant that complaint is substantiated. If the complaint is found to be not substantiated (see **Appendix H**), the complainant is also advised of his or her right to:

- Appeal within seven calendar days of receipt of the final written decision from the Village, and/or
- File a complaint externally with the U.S. Department of Transportation and/or the FTA.

Every effort will be made to respond to Title VI complaints within 60 working days of receipt of such complaints, if not sooner.

Once sufficient information for investigating the complaint is received by the Village, a written response will be drafted subject to review by the Village Attorney. If appropriate, the Village Attorney may administratively close the complaint. In this case, the Village will notify the complainant of the action as soon as possible.

In addition to the complaint process described above, a complainant may file a Title VI complaint with the following offices:

Federal Transit Administration Office of Civil Rights
Attention: Title VI Program Coordinator
East Building, 5th Floor-TCR 1200
New Jersey Ave., SE Washington, DC20590

The Complaint Procedure and Complaint Form contain a telephone number for an individual to contact in the event that he/she needs the information in another language. A copy of the Complaint Procedure is attached as (**Appendix D**), and a copy of the Complaint Form is attached as (**Appendix E**).

VI. Subcontracts and Vendors

All subcontractors and vendors who receive payments from the Village of Palmetto where funding originates from any federal assistance are subject to the provisions of Title VI of the Civil Rights Act of 1964 as amended.

Written contracts shall contain non-discrimination language, either directly or through the bid specification package which becomes an associated component of the contract.

VII. Record Keeping of Investigations, Complaints or Lawsuits

The Village of Palmetto Bay maintains a log of transportation-related Title VI investigations, complaints, and lawsuits. A copy of the log (as of October 6, 2014) is attached in **(Appendix I)**. The Village Attorney's Office shall be responsible for investigating and completing the log for any future complaints received regarding Title VI complaints and for any future formal administrative charges or lawsuits under Title VI.

VIII. Website Location of Title VI Notice, Procedure and Form

An individual may locate information about the Village's Non-Discrimination policy, Title VI Notice, Complaint Procedure, and Complaint Form for the circulator service on the Village's website (www.palmettobay-fl.gov) in one of several ways:

- By clicking the Ibus logo entitled "Ibus Information" at the bottom of the Village's home page.
- By selecting "Departments" on the left hand side of the home page under "Village Links" and then selecting "Public Works" and "Circulator Information."
- By selecting the link for "Visitors" on the home page and then selecting "Circulator Information" at the left hand side of the page.
- By selecting the link for "Visitors" on the home page and then selecting "Circulator Information" at the bottom of the page.

A user is linked to the same information regardless of which of the above options is used.

IX. Limited English Proficiency (LEP) Analysis

The Village of Palmetto Bay is located in Miami-Dade County, Florida. According to the United States Census Bureau, the village has a total area of 8.8 square miles (22.6 km²). 8.8 square miles (22.5 km²) of it is land and 0.04 square miles (0.1 km²) of it (0.44%) is mostly water. As of the census of 2000, the Village's estimated total population was 24,469 residents, 7,970 households, and 6,783 families residing in the village. There were 8,145 housing units at an average density of 925.6 per square mile (360.4/km²). The racial makeup of the village was 84.4% White (Non-Hispanic White 61.9%), 7.65% African American, 0.12% Native American, 3.00% Asian, 0.03% Pacific Islander, 2.44% from other races, and 1.35% from two or more races.

The principal languages among the Village's residents are English and Spanish. Of the Village's population 34.3% speak Spanish at home, (75% speak English very well and 25% speak English less than very well).

The Village provides information in English and in Spanish when it is requested. Residents can request translations of documents that are in English. The Public Works Department has employees who are bilingual and are fluent in Spanish. These employees are able to assist any Spanish-speaking residents who call or email the office with questions or who request information concerning the Circulator service. For passengers on the circulator, all of the current circulator drivers speak Spanish and the Village's "Notice of Rights Under Title VI of the Civil Rights Act of 1964" (printed in English and Spanish) is posted in each bus.

The Village uses several methods to communicate with its residents (whether about the circulator service or other Village issues). The Village's communication tools are the Village's website, Palmetto Bay TV channel WBAY, local community newspapers, social media accounts (Facebook), and the Village of Palmetto Bay E-Current Newsletter. Residents may watch WBAY from their home (with a Comcast cable subscription) or via the Village's website.

The Village Title VI Policy and Complaint Procedures is hosted on the Village's web page in English and made available in other languages as requested.

The Village educates our staff and contractors on the following procedure:

- a. Understanding the Title VI Policy and LEP responsibilities
- b. How to access Title VI Policy and Procedures via the Village's website.
- c. Document and resolve any language assistance deficiencies
- d. The procedure if a Title VI and/or LEP complaint is filed.

The Village will review LEP procedures annually to determine if modifications are needed to meet language assistance deficiencies.

X. Public Participation / Outreach Plan

The Village of Palmetto Bay seeks to engage the public in its planning and decision-making processes. Members of the public may make statements at Commission meetings during the "Public Hearing" portion of any Village Council meeting regardless of whether the Commission is considering a bus-related item during that meeting. The Council meetings occur the first Monday of every month with the exception of August whereas no meetings are scheduled during this month. Village Commission agendas are available for review by the public no less than ten (10) days before Commission meetings. Notices of resolutions or ordinances under Commission consideration are available on the Village's website www.palmettobayfl.gov. The agenda for Village Commission meetings are published three (3) business days in advance of the meeting on the Village's website, and notices of resolutions or ordinances being considered by the Village Commission are published on the Village's website ten (10) days in advance of a meeting. If any individual wishes to speak during the Public Hearing portion of a Commission meeting, but does not speak English fluently, he or she may contact the Village Clerk's Office at least three (3) days in advance to request a translator.

The Village continuously seeks to engage the public in its planning and decision-making processes for the Village's bus service. Members of the public may make a presentation or statement about the trolley service during the "Public Hearing" portion of any Village Council meeting.

As an agency receiving federal financial assistance, we have made the following community outreach efforts:

- Schools Surveys
- Church Surveys
- Website
- Transit Stakeholders
- The Village will ensure that all new riders are provided with a copy the Title VI Plan. The plan will be passed out to all current riders upon its approval. Any questions or concerns may be forwarded through the vehicle operator or an appointment may be made in person to discuss questions or concerns with the Office of the Village Manager.
- The Title VI plan will be located on the Village of Palmetto Bay website for review.
- All Village Council Commission meetings are open to the public and allow for public comments during the meeting.
- A satisfaction survey will be given to all transit riders on a yearly basis. This survey will be reviewed by the Director of Public Works.
- Customers' complaints are forwarded to the director of Public Works for review and investigation.
- Site Spanish speaking individuals who can assist those persons either with information relative to transportation or with lodging complaints or concerns.

Ordinances and resolutions adopted by the Village to apply for and utilize Federal and State grant funding are placed on the public hearing/meeting agenda and are subject to public notice and comment procedures.

The Village and its records are available to the public and the Village welcomes their input. The Village's Title VI Complaint Procedure is available to the public via the Village's website www.palmettobay-fl.gov

The Village has published a brochure about the bus service that contains a map of the bus route. The brochure is available to passengers on all buses. The brochure is currently available in English (see **Appendix J**).

XI. Employee Education

During New Employee Orientation and subsequent employee trainings, information relative to the provisions of Title VI, and the Saginaw County Commission on Aging's expectations to perform their duties accordingly will be reviewed and discussed.

All employees shall be provided a copy of the Title VI Plan and are required to sign the Acknowledgement of Receipt (**Appendix B and C**).

The Village of Palmetto Bay will ensure that all new riders are provided with a copy the Title VI Plan. The plan will be passed out to all current riders upon its approval.

XII. Service Standards

A. Vehicle Load

The Village currently has three (3) buses. All of the buses are wheelchair accessible and have secure space for one (1) wheelchair. Below is a table indicating the amount of passenger load each vehicle in the Village Circulator System may be able to accommodate.

IBUS	Year	Make	Sitting capacity	Standing Capacity	Passenger Total Capacity
3973-1	2006	Eldorado Aerotech	24	0	24
3974-2	2006	Eldorado Aerotech	24	0	24
4262-3	2007	Eldorado Aerotech	24	0	24

B. Service Availability and Vehicle On-Time Performance

Service Availability

The Village's bus service runs a split shift operation that consists of 2 routes. This service operates as close to schedule as possible. Traffic conditions may cause the IBUS arrival time to be slightly inaccurate. No service on Saturday & Sunday or on that holiday's observed by the governing body of the Village of Palmetto Bay.

Route A connects the densely residential community in the northern most section of the Village to shopping plazas, our beautiful Coral Reef Park, doctor offices, banks, elementary schools, and the very popular South Dade busway. This route operates from 10:00 AM till 1:50 AM Monday thru Friday. This route also provides connections to most of the Miami-Dade Transit routes which run throughout the Village.

Route B connects the densely residential community in the southern most section of the Village to shopping plazas, our beautiful Palmetto Bay Park, doctor offices, historic sites located in the Village, elementary schools, banks, MDC library, the coastal areas of Palmetto Bay and the very popular South Dade busway. This route operates from 7:00 AM till 8:52 AM and 2:10 PM til 5:20 PM Monday thru Friday. This route also provides connections to most of the Miami-Dade Transit routes which run throughout the Village.

On-Time Performance

Currently, the Village does not evaluate on-time performance but is interested in implementing the performance measure in the near future.

XIII. Service Policies

A. Transit Amenities

All buses are equipped with the following:

- Air conditioned interior
- Wheelchair accessible seating and lifts
- Non-skid surfaces at entrance and exit areas
- Bicycle racks for up to 2 bicycles
- MotoMon GPS Live Tracker System

Additionally, the Village provides a GPS Live Tracker which visually provides the specific real-time location of the bus via the Village's website. Signage and benches for 25 bus stops advising of the service's days, hours of operation, and a detailed route map are planned for implementation. Amenities such as stop benches will also be provided at each bus stop location throughout the Village.

B. Vehicle Assignment

The Village has a total of three (3) buses, however only one (1) bus is in service at a time. Currently the Village of Palmetto Bay of Doral operates a split route which operates during peak service hours on the south end of the Village and off peak hours on the north end of the Village. The other remaining buses are used as a back-up in order to rotate the buses so that preventive maintenance and other repairs can be performed.

XIV. Language Assistance Plan

The Village is taking responsible steps to ensure meaningful access to benefits, services, information and other important portions of its programs and activities for individuals who are Limited English Proficient. A copy of Village's Language Assistance Plan (LAP) is attached as *Appendix J*.

XV. Make up of Transit Related, Non-Elected Advisory Committees

The Village of Palmetto Bay does not have any transit related, non-elected boards, advisory councils or committees.



Appendix A - Notice of Rights Under Title VI of the
Civil Rights Act of 1964

ATTENTION: ALL VILLAGE OF PALMETTO BAY
IBUS PASSENGERS

Notice of Rights under Title VI of the Civil Rights Act of 1964

The Village of Palmetto Bay is committed to ensuring that no person is excluded from participation in, or denied benefits of, its IBUS Circulator Program on the basis of race, color, or national origin in accordance with Title VI of the Civil Rights Act of 1964. Any person who believes he or she has been subjected to discrimination under Title VI may file a written complaint with the Village of Palmetto Bay.

For more information on the procedure to file a complaint, contact 305-259-1234, visit the Village's website: www.palmettobay-fl.gov, or visit the Public Works administrative office at 9495 SW 180TH Street, Palmetto Bay, Florida 33157 or the Office of the Village Manager at 9705 E. Hibiscus Street, Palmetto Bay, Florida 33157.

An individual may also file a complaint directly with the Federal Transit Administration by filing a written complaint with the Office of Civil Rights, Attention: Title VI Program Coordinator, East Building, 5TH Floor-TC R, 1200 New Jersey Ave. SE, Washington, DC 20590.

If information is needed in another language, please contact 305-259-1234.



Appendix B – Employee Education Form Title VI Policy

No person shall, on the grounds of race, color or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance.

All employees of the Village of Palmetto Bay are expected to consider, respect, and observe this policy in their daily work and duties. If a citizen approaches you with a question or complaint, direct him or her to the Office of the Village Manager and Director of Public Works for the Village of Palmetto Bay.



Appendix C – Acknowledgement of Receipt of Title VI Plan

I hereby acknowledge the receipt of the Village of Palmetto Bay Title VI Plan. I have read the plan and am committed to ensuring that no person is excluded from participation in, or denied the benefits of its transit services on the basis of race, color, or national origin, as protected by Title VI in Federal Transit Administration (FTA) Circular 4702.1.A.

Your signature

Print your name

Date



Appendix D - Title VI Complaint Procedure

Title VI of the 1964 Civil Rights Act requires that "No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance."

Any person who believes he or she has been discriminated against on the basis of race, color, or national origin by the Village of Palmetto Bay may file a Title VI complaint by completing and submitting the agency's Title VI Complaint Form. A complaint may be filed no later than 180 days after the date of the alleged discrimination. The Village or its designated Title VI Coordinator will process complaints that are complete.

Once the complaint is received, the Village Manager's office will review it to determine if his office has jurisdiction. The complainant will receive an acknowledgement letter informing him/her whether the complaint will be investigated by the Office of the Village Manager.

The Village has 60 days to investigate the complaint. If more information is needed to resolve the case, the Manager's office may contact the complainant. The complainant will have 10 business days from the date of the letter to send the requested information to the investigator assigned to the case. If the investigator is not contacted by the complainant or does not receive the additional information within 10 business days, a representative of the Manager's office can administratively close the case. A case can also be administratively closed if the complainant no longer wishes to pursue their case.

After the case is investigated he/she will issue one of two letters to the complainant: a closure letter or a letter of finding (LOF). A closure letter summarizes the allegations and states that there was not a Title VI violation and that the case will be closed. An LOF summarizes the allegations and the interviews regarding the alleged incident, and explains whether any disciplinary action, additional training of the staff member or other action will occur.

If the complainant wishes to appeal the decision, he/she has 10 business days after the date of the LOF to do so. If information is needed in another language, please contact 305-259-1234.

A person may also file a complaint directly with: Federal Transit Administration within 180 days of the alleged incident. The complaint must be filed with the Office of Civil Rights.

FTA Office of Civil Rights
1200 New Jersey Avenue SE
Washington, DC 20590

Appendix E - Title VI Complaint Form



**Village of Palmetto Bay IBUS Circulator System
 Title VI Complaint Form**

Note: The Village of Palmetto Bay is committed to complying with Title VI of the Civil Rights Act of 1964 which states "No person in the United States shall, on the grounds of race, color or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance." Two Executive Orders extend Title VI protections to Environmental Justice, which also protects persons of low income, and Limited English Proficiency (LEP).

If you need assistance in completing this form, please contact the Office of the Village Manager.

PLEASE FILL OUT COMPLETELY.

Section I:		
Name:		
Address:		
Telephone (Home):	I (Work):	(Cell):
Email Address:		
Section II:		
Are you filing this complaint on your own behalf/		Yes* No
*/ (you answered "Yes" to this question, go to Section III.		
If you answered "No" to this question, please supply the name and relationship of the person for whom you are complaining:		
Please explain why you have filed for a third party:		
Please confirm that you have obtained the permission of the aggrieved party, if you are filing on behalf of a third party.		Yes No
Section III:		
I believe the discrimination experienced was based on (check all that apply): () Race () Color () National Origin		
Date of alleged discrimination (month, day, year): _____		

Explain as clearly as possible what happened and why you believe you were discriminated against. Describe all persons who were involved. Include the name and contact information of the person(s) who discriminated against you (if known) as well as names and contact information of any witnesses. (If more space is needed, please use the back of this form or attach additional sheet(s)).



Appendix F

Letter Acknowledging Receipt of Complaint

Village Letterhead

Date

Complainant's Name

Complainant's Address Dear

(Mr/Ms):

This letter is to acknowledge receipt of your complaint against the Village of Palmetto Bay alleging:

An investigation will begin shortly. If you have additional information you wish to convey or questions concerning this matter, please feel free to contact this office by telephoning 305-259-1234, or write to me at this address.

Sincerely,

Attention: Village of Palmetto Bay
Office of the Village Manager
9705 E. Hibiscus Street
Palmetto Bay, Florida



Appendix G

Letter Notifying Complainant that the
Complaint is Substantiated

Village Letterhead

Date

Complainant's Name

Complainant's Address

Dear (Mr/Ms):

The matter referenced in your letter of _____(date) against the Village of Palmetto Bay alleging Title VI violation has been investigated.

The violation of the Title VI of the Civil Rights Act of 1964 mentioned in your letter was identified. Corrective action of this deficiency(s) is being implemented to ensure that this issue does not arise again

Thank you for bringing this important matter to our attention.

Sincerely,

Village of Palmetto Bay
Office of the Village Manager
9705 E. Hibiscus Street
Palmetto Bay, Florida



Appendix H
Letter Notifying Complainant that the Complaint is not Substantiated

Village Letterhead

Date

Complainant's Name
Complainant's Address

Dear (Mr/Ms):

The matter referenced in your complaint of (date) against the Village of Palmetto Bay alleging _____ has been investigated.

The results of the investigation did not indicate that the provisions of Title VI of the Civil Rights Act of 1964 had in fact been violated. As you know, Title VI prohibits discrimination based on race, color, or national origin in any program receiving federal financial assistance.

The Village Attorney has analyzed the materials and facts pertaining to your case for evidence of the city's failure to comply with any of the civil rights laws. There was no evidence found that any of these laws have been violated.

I therefore advise you that your complaint has not been substantiated, and that I am closing this matter in our files.

You have the right to:

- 1) Appeal within seven calendar days of receipt of this final written decision from the Village, and/or;
- 2) File a complaint externally with the U.S. Department of Transportation and/or the Federal Transit Administration at:

Federal Transit Administration Office of Civil Rights
Attention: Title VI Program Coordinator
East Building, 5th Floor
TCR 1200 New Jersey Ave.,
SE Washington, DC 20590

Thank you for taking the time to contact us. If I can be of assistance to you in the future, do not hesitate to call me.

Sincerely,

Village of Palmetto Bay
Office of the Village Manager
9705 E. Hibiscus Street
Palmetto Bay, Florida



Appendix I - Village Log of Transportation-Related Title VI Investigations, Complaints and Lawsuits



Village of Palmetto Bay
 Title VI

Complaint Monitoring

Reference Number	Date Complaint Received (xx/xx/xx)	Date of Incident (xx/xx/xx)	Summary (describe complaint; race, color, or national origin)	Status (Ongoing/Closed)	Action(s) Taken	Date of Action (xx/xx/xx)

Note: The Village of Palmetto Bay does not have any complaints to disclose at this time. Any future disclosures will be listed under the Title VI Program Plan.



Village of Palmetto Bay
 Title VI

Investigation Monitoring

Reference Number	Date Complaint Received (xx/xx/xx)	Date of Incident (xx/xx/xx)	Summary (describe complaint; race, color, or national origin)	Status (Ongoing/Closed)	Action(s) Taken	Date of Action (xx/xx/xx)

Note: The Village of Palmetto Bay does not have any investigations to disclose at this time. Any future disclosures will be listed under the Title VI Program Plan.



Village of Palmetto Bay
 Title VI

Lawsuit Monitoring

Reference Number	Date Complaint Received (xx/xx/xx)	Date of Incident (xx/xx/xx)	Summary (describe complaint; race, color, or national origin)	Status (Ongoing/Closed)	Action(s) Taken	Date of Action (xx/xx/xx)

Note: The Village of Palmetto Bay does not have any lawsuits to disclose at this time. Any future disclosures will be listed under the Title VI Program Plan.



Appendix J - Village of Palmetto Bay

IBUS Information Brochure

"IBUS" is a play on words to reflect the many beautiful ibis that frequent Village parks and neighborhoods. The blue and white buses feature an impressive drawing of this native bird.



Village of Palmetto Bay

IBUS

"This circulator service furthers our efforts to provide the community with an effective, eco-friendly mode of transportation," stated former Councilmember, Paul Neidhart. "Previously, residents had to find their own way to the busway or one of the County's other transit routes."

PUBLIC WORKS

TRANSIT STAFF

Corrice E. Patterson, Director
 Kristina Perez, Administrative Assistant
 Danny Casals, Field Operations Supervisor
 Juan Lopez, Bus Operator



"It is gratifying to be able to provide residents with this vital link between our village and the very popular Metrorail Public Director Patterson. of our IBUS is in direct demands for forms of transportation and well-timed, convenient schedules." "You could say IBUS has really taken off."



INFORMATION

For additional information about the Village of Palmetto Bay's IBUS service destinations and connections you may visit or contact the Public Works Department at:

9495 SW 180TH Street
 Palmetto Bay, Florida 33157
 Phone: (305) 969-5011
 Fax: (305) 969-5091

You may also visit the Village of Palmetto Bay Web Site at:
www.palmettobay.fl.gov

MAYOR
 Shelley Stanczyk

VICE MAYOR
 John DuBois

COUNCILMEMBER DISTRICT 1

Patrick Fiore

COUNCILMEMBER DISTRICT 2

Tim Schaffer

COUNCILMEMBER DISTRICT 3

Joan S. Lindsay

VILLAGE MANAGER
 Ron E. Williams

Updated February 2014

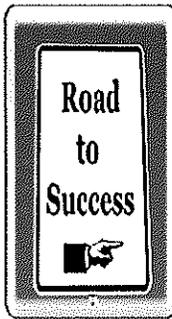


The Village of Palmetto Bay IBUS service is air-conditioned, wheelchair accessible and bike rack equipped.

The Village's successful connector bus continues to do its part driving ever-increasing numbers of residents to Busway/Metrorail service. In the six-month period ending February 2012, ridership continues to be consistent, from 703 riders in September 2011 to 761 in February 2012

Village IBUS Service Is Succeeding By:

- ❖ Key intersections and sidewalks have been upgraded along IBUS routes throughout the Village (making them ADA compliant);



- ❖ IBUS is an efficient eco-friendly operation by properly adjusting routes and schedules;

- ❖ The service meets the needs of loyal riders on popular routes such as Route B into the Palmetto Bay Village Center;

- ❖ IBUS is the only public transportation within the Village that links riders to the Miami-Dade Busway and Metrorail service.

HOURS OF OPERATION

Monday through Friday

Route A:
10:04 a.m. – 1:50 p.m.

Route B:
7:00 a.m. – 8:50 a.m.
2:10 p.m. – 5:20 p.m.

Please refer to the route map for the IBUS schedules and destinations.

HOLIDAYS

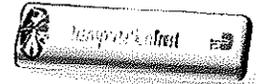
No service on Saturday & Sunday or on the following holiday's observed by the Village of Palmetto Bay:

- New Year's Day
- Martin Luther King, Jr. Day
- President's Day
- Memorial Day
- Independence Day
- Labor Day
- Columbus Day
- Veteran's Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Day



VILLAGE OF PALMETTO BAY BUS SERVICE

In 2006, the Village of Palmetto Bay launched a much-needed intra-Village bus service in full compliance with Miami-Dade County policy, as directed by the staff of the Citizens' Independent Transportation Trust (CITT) and the County Attorney's Office. The service was



designed to increase the number of destinations that can be reached via fixed public routes throughout Palmetto Bay and surrounding areas, as well as to connect with Miami-Dade Transit routes and the very popular busway. This initiative is being paid for with funding provided by the People's Transportation Plan (PTP). As stated in a publication of the Citizens' Independent Transportation Trust, "the plan was created because of public demand for greater mobility choices in Miami-Dade County. The citizens backed their demand at the ballot box by approving the transportation surtax to fund the projects in the PTP."

The Village bus service also provides public transportation to parks within the boundaries of the Village. There is no fare when using the Village IBUS service. Riders making connection to Miami-Dade Transit are expected to pay the appropriate fares at time of transfer.



Appendix K

VILLAGE OF PALMETTO BAY



**Language Assistance Plan
(LAP)**

February 2015

INTRODUCTION

The Village of Palmetto Bay (Village) as a sub-recipient of federal funding is required to ensure that Limited English Proficient (LEP) persons have *meaningful* access to programs and activities by developing and carrying out a language implementation plan pursuant to recommendations in Section VII of the U.S. Department of Transportation (DOT) LEP Guidance.

The starting point for the Language Assistance Plan (LAP) is the four-factor analysis developed by the U.S. Department of Transportation to assist agencies in creating language access plans. The four-factor approach allows the Village to prioritize types of language services and to ensure that appropriate language assistance resources are promptly available where most needed.

DEMOGRAPHIC INFORMATION

The Village determined the extent of its obligation to provide LEP services by employing the recommended four-factor analysis. This assessment includes:

- (1) The number or proportion of LEP persons eligible to be served or likely to encounter the Village’s programs and services; and
- (2) The frequency with which LEP individuals come in contact with the Village’s programs and services; and
- (3) The importance of Village’s programs and services to people's lives; and
- (4) The resources available to the Village and costs associated with providing language services.

Factor 1: The number or proportion of LEP persons eligible to be served or likely to encounter the Village’s programs and services

The data from the 2000U.S. Census Bureau and www.palmettobay-fl.gov on Table 1 & 2 provides information of those speaking a language other than English at home in the Village of Palmetto Bay.

Table 1: Language Spoken at Home in the Village of Palmetto Bay

AMONG PEOPLE LIVING IN THE VILLAGE OF PALMETTO BAY	ESTIMATE	PERCENT
Population	23,801	
English only	16,399	68.9%
Language other than English	7,402	31.1%

Table 2: Analysis of LEP Population in the City of Hercules

SELECTED SOCIAL CHARACTERISTIC IN THE U.S. - SPEAK A LANGUAGE OTHER THAN ENGLISH AT HOME	ESTIMATE	PERCENT
Spanish	6,402	26.9%
Other languages	1,000	4.20%

With the wide range of languages within the Spanish and Asian category, further analysis was done to determine which language services the Village shall provide. Data from the 2000 Census Survey provides information regarding the race population of the Village, shown in Table 3.

Table 3: Highest Race Population in the Village of Palmetto Bay

RACE	NUMBER	PERCENT
White Non-Hispanic	6,038	61.9%
Black Non-Hispanic	5,319	7.6%
Hispanic	4,562	26.9%
Some Other Race	1,564	4.2%

The 2000 Census Survey Data shows that Hispanic has the largest non-English speaking population living in the Village. With Spanish as the primary language spoken, staff has determined that Spanish is an eligible LEP language group.

Factor 2: The frequency with which LEP individuals come in contact with Village services

Staff will survey the frequency LEP individuals use Village services at the front desk of Village Hall, parks and Recreation, Permitting, Planning and Zoning and Public Works. The results of the survey will then be used to assess the Village's language assistance needs.

Factor 3: The importance of the Village of palmetto Bay services to people's lives

Accessing the Village's emergency, planning, permitting and recreational services are very important to the residents, and staff will strive to provide language assistance when needed.

Factor 4: The resources available to the Village of Palmetto Bay and costs associated with providing language services

Adequate resources are critical for a successful LAP program. At this time, the costs associated with delivery of service to LEP individuals are not known. Self-assessment of costs will help to identify resources spent and needed for the LAP program. Reduction of costs for language services shall be pursued through use of technology, sharing of materials and services, use of bilingual staff resources, efficient procurement of contract services, and community participation.

Language Assistance Services

The Village's administrative and field staff has several bilingual employees who speak English and Spanish. Staff with bilingual capabilities will be available to LEP individuals if needed. An employee survey will be conducted to determine what other languages, other than English are understood and spoken. This information will be documented and analyzed to enhance the effectiveness of the LAP.

Notification to LEP Individuals

The public must be informed of their rights under Title VI. This will be done by:

- Notification displayed at Village of Palmetto Bay front desk of Village Hall, parks and Recreation, Permitting, Planning and Zoning and Public Works.
- Notification will be posted on the Village's website (www.palmettobay-fl.gov)
- Notification will be posted on all Village issued publications

Public Participation and Outreach

The Village of Palmetto Bay employs a number of methods to inform the public of Village programs and services, including but not limited to the following:

- Press releases
- Ads and public notices in E-Current
- Community meetings/workshops
- Information posted on the Village of Palmetto Bay website (www.palmettobay-fl.gov)
- Facebook
- Information posted on local public access television station (WBAY TV Channel 77)

Staff Training

The Village of Palmetto Bay works to educate its staff with the knowledge of and sensitivity to the needs of LEP residents. Staff will be trained on procedures for accommodating LEP populations. Some of the items covered include information about LEP guidance from the U.S. DOT.

Training Materials

Training materials will be developed for staff that interacts with LEP populations. The materials will include instruction on how to respond to face to face interactions, phone inquiries and written communications from LEP persons. Training materials will include instruction on how to arrange for translation services should they be required.

Monitoring and Updating of the LAP

The Village will monitor requests for translations and adjust practices to meet demand while maintaining a basic level of access by LEP populations to vital information. Staff will be using Language Identification Cards to help identify what languages people they interact with use. These cards will be issued at all the public counters in order to collect more data on the languages spoken by Palmetto Bay residents. These cards are collected and the data tabulated to be included in future LEP plan updates.

Contact Information

Any comments or questions related to this plan should be directed to the designated Title VI representative from the Office of the Village Manager:

Village of Palmetto Bay
Office of the Village Manager
9705 E. Hibiscus Street, Palmetto Bay, FL 33157
Telephone: (305) 259-1234 Fax: (305) 259-1290



To: Honorable Mayor and Village Council

Date: February 23, 2015

From: Ron E. Williams, Village Manager

Re: Engineering Services for
Comprehensive Operational
Analysis of Village Shuttle Bus
Services

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, RELATING TO ENGINEERING SERVICES FOR COMPREHENSIVE OPERATIONAL ANALYSIS (COA) OF VILLAGE SHUTTLE BUS SERVICES; AUTHORIZING THE VILLAGE MANAGER TO EXECUTE A PROJECT AGREEMENT WITH THE CORRADINO GROUP, INC. TO PROVIDE THIS SPECIALIZED TRANSIT STUDY AND TO APPROVE EXPENDITURE OF FUNDS IN AN AMOUNT NOT TO EXCEED \$32,000.00; AND PROVIDING FOR AN EFFECTIVE DATE. (Administration)

BACKGROUND AND ANALYSIS:

In December 2004 as per Resolution No: 04-101, the Village of Palmetto Bay contracted with the Corradino Group for the provision of specialized transit services to potentially support the specific needs of our seniors and youth. The study examined the need and cost of a potential circulator transit service for these specific groups. In 2006, the Corradino Group assisted the Village of Palmetto Bay in launching a much-needed intra-Village bus service in full compliance with Miami-Dade County policy, as directed by the staff of the Citizens' Independent Transportation Trust (CITT) and the County Attorney's Office. The service was designed to increase the number of destinations that can be reached via fixed public routes throughout Palmetto Bay and surrounding areas, as well as to connect with Miami-Dade Transit routes and the very popular busway. This initiative is being paid for with funding provided by the People's Transportation Plan (PTP).

The Village of Palmetto Bay currently operates 2 shuttle routes, route A and B, which operate Monday through Friday.

Route A:

10:04 a.m. – 1:50 p.m.

Route B:

7:00 a.m. – 8:52a.m.

2:10p.m. – 5:20p.m.

The Village bus service provides public transportation to parks and other principal locations within the boundaries of the Village. There is no fare when using the Village IBUS service. Riders making connection to Miami-Dade Transit and are expected to pay the appropriate fares at time of transfer.

Several changes to improve ridership and provide better connectivity to Miami Dade Transit routes have been made to the Ibus route over the past eight (8) years. The demographics and implementation of transit routes in the neighboring communities should be evaluated to re-establish the general parameters of the Village's current transit system. A comprehensive analysis of the Village's shuttle bus system is needed to provide insight onto how to evolve our current transit system to best serve not only the residents/visitors and existing riders that currently use the Village's shuttle service but develop/design an integrated feeder/shuttle bus service that connects to Miami-Dade Transit at the busway, and potential travel market from the Village of Pinecrest and the Town of Cutler Bay transit service and those local transit stops within the Village that are currently served by the Miami-Dade transit. The study shall explore the market for shuttle service and determine whether the existing routes should be reconfigured, discontinued or consolidated. The potential for other mechanisms for providing the service, including employer sponsored services, vanpools, ridesharing or demand responsive services shall also be examined.

In response to the Village's needs, the Corradino Group responded to the Department of Public Works request for a proposal to undertake a Comprehensive Operational Analysis (COA) of the Village's current shuttle services.

As per Resolution No. 2013-40 approved on May 6, 2013, the Corradino Group is qualified to provide ongoing transportation engineering services for the Village of Palmetto Bay. The Corradino Group developed the original Palmetto Bay systems and the Cutler Bay transit system and was also instrumental in planning and evaluating the Pinecrest system. The firm planned the US-1 Bus lanes, and has performed the most recent alternatives analysis of the US-1 Corridor, as well as has conducted data collection for all of the South Dade MDT Routes. The Corradino Group has extensive information and local knowledge that will be used to minimize data collection efforts and to better serve the Village during this COA.

The Corradino Group in response to the Village's request provided a proposal to perform a COA as it relates to expeditious and efficient completion of the project described hereunder.

Task 1 – Data Collection

Ridership –conduct comprehensive counts of bus ridership from FY 14-15 for the Village of Pinecrest, Town of Cutler Bay and Miami Dade Transit routes that run within the boundary of the Village. It is anticipated that the successful proposer will not be required to conduct additional counts.

Passenger Survey – A comprehensive passenger survey on all shuttle routes will be conducted to obtain information about the demographics of the riders, trip origin and destination and attitudes about the service. A reasonable sample must be obtained for each route. The survey results will be tabulated and analyzed in a technical memorandum.

Run Time Analysis – The study shall examine how the shuttles spend their time traveling from route origin to destination, to determine the cause and extent of delays and opportunities for improving running times. Possible rerouting, traffic signal retiming or traffic signal priority to improve running times without negatively impacting ridership shall be examined. The results shall be analyzed in a technical memorandum.

Task 2 – Study Oversight/Public Outreach

A Steering Committee will be formed consisting of Public Works Transit Operations, Planning and Zoning, Miami-Dade Transit, Village of Pinecrest Transit Operations, and Town of Cutler Bay Transit Operations. The Steering Committee will provide oversight to the study process at key junctures. There will also be meetings to inform the general public about the study and to solicit their input. Publicity for the public meetings will focus on the riders and potential riders of the shuttles. The Village will publicize the meetings and arrange meeting locations. It is estimated that 2 or 3 public meetings will be held. Interviews shall also be conducted with businesses, churches, and public schools to obtain information about origins and destinations of possible commuters. Summaries of all meetings and interviews shall be provided.

Task 3 – Market Analysis

Using the data and information from Tasks I and II, and additional data sources as necessary, the successful proposer shall determine the market for shuttle service in the Village of Palmetto Bay. A technical memo on the projected demand for service shall be provided.

Task 4 – Conduct an Individual Route Analysis for each Shuttle Route and Identify Service Improvements/Alternatives

Opportunities to improve service, increase operating efficiency, reconfigure routes, provide new routes and eliminate/consolidate routes shall be determined. The potential for changes in scheduling (i.e. – time of day, reduced headways, etc.), and span of service shall be evaluated.

The successful proposer shall also identify opportunities for providing alternative service to the existing shuttles that would serve the same markets, such as fixed routes with flexible/fixed schedule traveling in a fixed direction and/or bidirectional. The operating and financial implications of the proposed service changes shall be identified. The frequency of these services, and the types of services offered, may vary to reflect particular demand dynamics, such as season, day of week, and time of day. It is the goal of the Shuttle to provide convenient, user friendly service within the Village of Palmetto Bay in a cost effective manner. The recommendations shall be provided in technical memorandum.

Input	Output
Survey	Demand Analysis
Road Map	Routing + Stops
Standard + Travel Time	Frequency + Timetable
Shuttle Buses + Travel Time	(3) Buses + Scheduling
Operators	Scheduling Drivers
Communication	Caller Information

Advertise Routes

County Transit, Website/E-Current/Facebook, &
Brochures

Pilot Test Routes

Operational Routes

Update

Change Route if Needed

Task 5 – Final Report

The final report shall synthesize information from previous tasks and provide an overall plan for best serving the market for shuttle bus service that connects to Miami-Dade Transit at the busway, and between the Village of Pinecrest and the Town of Cutler Bay. The final report shall consist of an executive summary further detailing existing shuttle conditions and proposed shuttle service conceptual plan. Transit ridership survey and de Fleet requirements and capital and operating costs shall be provided. All study products shall be provided in electronic format. A conceptual design for the recommended route, map and schedule improvements shall be prepared by the consultant. Promotional material for route enhancements shall be designed under the scope of this project.

The final report shall also include the following information:

- a) Shuttle Demand Forecast
- b) Service Concept
- c) Survey Results
- d) Equipment (types of buses that might meet the transportation needs)
- e) Operating Structure
- f) Operating Costs
- g) Sources of Operating Revenues

The Administration is requesting authorization to enter into an agreement with the Corradino Group for the purpose of evaluating the Ibus shuttle service and provide insight into how to develop a transit system that best serve the residents and visitors of Palmetto Bay. Transit is a key issue because alternatives need to be provided as roadway capacity continues to diminish.

FISCAL/BUDGETARY IMPACT:

Twenty percent of the Peoples Transportation Plan money is to go to transit use. The Village budgets this item under "Special Revenue Fund-Transit Sales Tax" in an amount not to exceed \$32,000 in the Fiscal Year 2014-2015.

RECOMMENDATION:

Approval is recommended.

RESOLUTION NO. _____

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, RELATING TO ENGINEERING SERVICES FOR COMPREHENSIVE OPERATIONAL ANALYSIS (COA) OF VILLAGE SHUTTLE BUS SERVICES; AUTHORIZING THE VILLAGE MANAGER TO EXECUTE A PROJECT AGREEMENT WITH THE CORRADINO GROUP, INC. TO PROVIDE THIS SPECIALIZED TRANSIT STUDY AND TO APPROVE EXPENDITURE OF FUNDS IN AN AMOUNT NOT TO EXCEED \$32,000.00; AND PROVIDING FOR AN EFFECTIVE DATE. (Administration)

WHEREAS, in December 2004 as per Resolution No. 04-101, the Village of Palmetto Bay contracted with the Corradino Group for the provision of specialized transit services to potentially support the specific needs of our seniors and youth;; and,

WHEREAS, in 2006, the Corradino Group assisted the Village of Palmetto Bay in launching a much-needed intra-Village bus service in full compliance with Miami-Dade County policy; and,

WHEREAS, the Village of Palmetto Bay currently operates 2 shuttle routes, route A and B, which operate Monday through Friday; and,

WHEREAS, the demographics and implementation of transit routes in the neighboring communities should be evaluated to re-establish the general parameters of the Village's current transit system, and;

WHEREAS, a comprehensive analysis of the Village's shuttle bus system is needed to provide insight onto how to evolve our current transit system to best serve not only the residents/visitors and existing riders that currently use the Village's shuttle service but develop/design an integrated feeder/shuttle bus service that connects to Miami-Dade Transit at the busway, and potential travel market from the Village of Pinecrest and the Town of Cutler Bay transit service and those local transit stops within the Village that are currently served by the Miami-Dade transit.; and,

WHEREAS, the Corradino Group in response to the Village's request provided a proposal to perform a COA as it relates to expeditious and efficient completion of the project; and,

WHEREAS, as per resolution No. 2013-40 approved on May 6, 2013, the Corradino Group is qualified to provide ongoing transportation engineering services for the Village of Palmetto Bay; and,

WHEREAS, the Corradino Group developed the original Palmetto Bay system and the Cutler Bay transit system and was also instrumental in planning and evaluating the Pinecrest system. The firm planned the US-1 Bus lanes, and has performed the most recent alternatives

analysis of the US-1 Corridor, as well as has conducted data collection for all of the South Dade MDT Routes ; and,

WHEREAS, the Administration is requesting authorization to enter into an agreement with the Corradino Group for the purpose of evaluating the Ibus shuttle service and provide insight into how to develop a transit system that best serve the residents and visitors of Palmetto Bay; and,

WHEREAS, the Village budget this item under "Special Revenue Fund-Transit Sales Tax" in an amount not to exceed \$32,000 in the Fiscal Year 2014-2015; and,

NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, AS FOLLOWS:

Section 1. The Village Manager is authorized to execute an agreement with the Corradino Group to provide Transportation Engineering Services to complete a comprehensive analysis of the Village's shuttle bus system in an amount not to exceed \$32,000.

Section 2. This resolution shall take effect immediately upon approval.

PASSED AND ADOPTED this _____ day of March 2015.

Attest: _____
Meighan J. Alexander
Village Clerk

Eugene Flinn
Mayor

APPROVED AS TO FORM AND LEGAL SUFFICIENCY FOR THE USE AND RELIANCE OF THE VILLAGE OF PALMETTO BAY, FLORIDA ONLY:

Dexter W. Lehtinen
Village Attorney

FINAL VOTE AT ADOPTION:

Council Member Katryn Cunningham _____

Council Member Tim Schaffer _____

Council Member Larissa Siegel Lara _____

Vice-Mayor John DuBois _____

Mayor Eugene Flinn _____

RESOLUTION NO. 2013-40

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, RELATING TO PROFESSIONAL SERVICES; APPROVING THE QUALIFICATION OF FIRMS TO PROVIDE TRANSPORTATION PLANNING & ENGINEERING SERVICES, ENGINEERING SERVICES FOR ELECTRICAL ENGINEERING, MECHANICAL ENGINEERING & PLUMBING SYSTEMS, STRUCTURAL ENGINEERING, LANDSCAPE ARCHITECTURE, GENERAL PLANNING SERVICES, ARCHITECTURE, GENERAL CIVIL ENGINEERING SERVICES TO THE VILLAGE; AUTHORIZING THE VILLAGE MANAGER TO ENTER INTO CONTRACT NEGOTIATIONS WITH THE CORRADINO GROUP, INC., FLORIDA TRANSPORTATION ENGINEERING, INC., MARLIN ENGINEERING, WOLFBERG ALVAREZ AND PARTNERS, AMEC, PISTORINO & ALAM CONSULTING ENGINEERS, INC., STANTEC CONSULTING SERVICES, INC., NARMEL ENGINEERING, INC., O'LEARY RICHARDS DESIGN ASSOC., INC., KIMLEY-HORN & ASSOCIATES, INC., CALVIN, GIORDANO & ASSOC., INC., BERMELLO AJAMIL & PARTNERS, INC., AND KEITH & SCHNARS, P.A.; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, in order to implement recommended improvements to the Village as outlined in its Stormwater Master Plan, Transportation Master Plan, Parks Master Plan, and Comprehensive Master Plan, the need for quick response and professional expertise is required; and

WHEREAS, a Request for Qualifications (RFQ) 2013-PW-100 was issued for qualified firms or teams of firms to obtain Professional Services in 7 service areas; and

WHEREAS, pursuant to Chapter 287.055, Florida Statutes, the Village will retain consultants to provide professional services in Transportation Planning & Engineering Services, Electrical Engineering, Mechanical Engineering & Plumbing Systems, Structural Engineering, Landscape Architecture, General Planning Services, Architecture, and General Civil Engineering; and

WHEREAS, in order to fulfill the needs of quick response and professional expertise, the Village intends to retain three (3) Consultants in each Service Area; and

WHEREAS, the Village conducted a mandatory Pre-RFQ response meeting on February 25, 2013 at the Edward & Arlene Feller Community Room; in response to the Village of Palmetto Bay's RFQ # 2013-PW-100, a total of 59 responses were received from many experienced, talented and highly capable firms; and

WHEREAS, as a result of the two part screening process and deliberations, the selection committee is recommending and requesting Village Council approval of the 3 highest ranking firms in accordance with the attached evaluation tabulation for each service area; and

WHEREAS, it should be noted that, along with the Village's overall desire to continue to implement the recommendations of its Master Plans, there are also legislative requirements (Chapter 287.055, Florida Statute) that must be adhered to by municipalities; and

WHEREAS, the eventual contracting for these services is in the best interest of Village improvements and in certain instances their end products are mandated; and

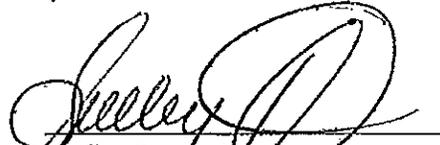
NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, AS FOLLOWS:

Section 1. The Village Manager is authorized to enter into contract negotiations with the selected Consultants to provide professional engineering services.

Section 2. This Resolution shall become effective immediately.

PASSED AND ADOPTED this 6th day of May, 2013.

Attest: 
Meighan J. Alexander
Village Clerk


Shelley Stanczyk
Mayor

APPROVED AS TO FORM:


Eve A. Boutsis,
FIGUEREDO & BOUTSIS, P.A., as Office
of the Village Attorney

FINAL VOTE AT ADOPTION:

Council Member Patrick Fiore	<u>YES</u>
Council Member Tim Schaffer	<u>YES</u>
Council Member Joan Lindsay	<u>YES</u>
Vice-Mayor John DuBois	<u>YES</u>
Mayor Shelley Stanczyk	<u>YES</u>

VILLAGE OF PALMETTO BAY REQUEST FOR QUOTE



Project Title: **Engineering Services for Comprehensive Operational Analysis (COA) of Village Shuttle Bus Services**

Issued: Monday, December 15, 2014

Due Date: Friday, December 19, 2014

1.0 Introduction

The Village of Palmetto Bay (Village) Public Works Department, Division of Transit Operations is seeking proposals from qualified consulting firms to undertake a COA of its shuttle services. It is the intent of the Village to hire a pre-qualified consultant who is knowledgeable in planning, engineering, design and operation of transit systems; intermodal connections including but not limited to bus (local), bus rapid transit, automobile, bicycle and pedestrian; function, transportation modeling, ridership forecasting, and capital and operating cost analysis for transit supportive development opportunities within the Village of Palmetto Bay.

2.0 Background

The Village of Palmetto Bay currently operates two (2) shuttle routes. In 2006, the Village of Palmetto Bay launched a much-needed intra-Village bus service in full compliance with Miami-Dade County policy, as directed by the staff of the Citizens' Independent Transportation Trust (CITT) and the County Attorney's Office. The service was designed to increase the number of destinations that can be reached via fixed public routes throughout Palmetto Bay and surrounding areas, as well as to connect with Miami-Dade Transit routes and the very popular busway. This initiative is being paid for with funding provided by the People's Transportation Plan (PTP).

Shuttle Bus Schedule

Both Route Routes A and B operate Monday through Friday

Route A:

10:04 a.m. – 1:50 p.m.

Route B:

7:00 a.m. – 8:52a.m.

2:10p.m. – 5:20p.m.

The Village bus service also provides public transportation to parks within the boundaries of the Village. There is no fare when using the Village IBUS service. Riders making connection to Miami-Dade Transit are expected to pay the appropriate fares at time of transfer.

3.0 Scope of Work

The purpose of the COA is to determine not only how best to serve the residents/visitors and existing riders that currently use the Village's shuttle service but develop/design an integrated feeder/shuttle bus service that connects to Miami-Dade Transit at the busway, and potential travel market from the Village of Pinecrest and the Town of Cutler Bay transit service and those local transit stop within the Village that are currently served by the Miami-Dade transit shuttle services. The study shall explore the market for shuttle service and determine whether the existing routes should be reconfigured, discontinued or consolidated. The potential for other mechanisms for providing the service, including employer sponsored services, vanpools, ridesharing or demand responsive services shall also be examined.

The Consultant shall provide expertise during all elements of the Comprehensive Operational Analysis (COA) as it relates to expeditious and efficient completion of the project described hereunder.

Consultant Responsibility

The consultant(s) chosen for this project shall be responsible for the following tasks:

Task 1 – Data Collection

Ridership –conduct comprehensive counts of bus ridership from FY 14-15 for the Village of Pinecrest, Town of Cutler Bay and Miami Dade Transit routes that run within the boundary of the Village. It is anticipated that the successful proposer will not be required to conduct additional counts.

Passenger Survey – A comprehensive passenger survey on all shuttle routes will be conducted to obtain information about the demographics of the riders, trip origin and destination and thoughts about the service. A reasonable sample must be obtained for each route. The survey results will be tabulated and analyzed in a technical memorandum.

Run Time Analysis – The study shall examine how the shuttles spend their time traveling from route origin to destination, to determine the cause and extent of delays and opportunities for improving running times. Possible rerouting, traffic signal retiming or traffic signal priority to improve running times without negatively impacting ridership shall be examined. The results shall be analyzed in a technical memorandum.

Task 2 – Study Oversight/Public Outreach

A Steering Committee will be formed consisting of Public Works Transit Operations, Planning and Zoning, Miami-Dade Transit, Village of Pinecrest Transit Operations, and Town of Cutler Bay Transit Operations. The Steering Committee will provide oversight to the study process at key junctures. There will also be meetings to inform the general public about the study and to solicit their input. Publicity for the public meetings will focus on the riders and potential riders of the shuttles. The Village will publicize the meetings and arrange meeting locations. It is estimated that 2 or 3 public meetings will be held. Interviews shall also be conducted with businesses, churches, and public schools to obtain information about origins and destinations of possible commuters. Minutes/summaries of all meetings and interviews shall be provided.

Task 3 – Market Analysis

Using the data and information from Tasks I and II, and additional data sources as necessary, the successful proposer shall determine the market for shuttle service in the Village of Palmetto Bay. A technical memo on the projected demand for service shall be provided.

Task 4 – Conduct an Individual Route Analysis for each Shuttle Route and Identify Service Improvements/Alternatives

Opportunities to improve service, increase operating efficiency, reconfigure routes, provide new routes and eliminate/consolidate routes shall be determined. The potential for changes in scheduling (i.e. – time of day, reduced headways, etc.), and span of service shall be evaluated.

The successful proposer shall also identify opportunities for providing alternative service to the existing shuttles that would serve the same markets, such as fixed routes with flexible/fixed schedule traveling in a fixed direction and/or bidirectional. The operating and financial implications of the proposed service changes shall be identified. The frequency of these services, and the types of services offered, may vary to reflect particular demand dynamics, such as season, day of week, and time of day. It is the goal of the Shuttle to provide convenient, user friendly service within the Village of Palmetto Bay in a cost effective manner. The recommendations shall be provided in technical memorandum.

Input	Output
Survey	Demand Analysis
Road Map	Routing + Stops
Standard + Travel Time	Frequency + Timetable
Shuttle Buses +Travel Time	(3) Buses + Scheduling
Operators	Scheduling Drivers
Communication	Caller Information
Advertise Routes	County Transit, Website/E-Current/Facebook, & Brochures
Pilot Test Routes	Operational Routes
Update	Change Route if Needed

Task 5 – Final Report

The final report shall combine information from previous tasks and provide an overall plan for best serving the market for shuttle bus service that connects to Miami-Dade Transit at the busway, and between the Village of Pinecrest and the Town of Cutler Bay. The final report shall consist of an executive summary further detailing existing shuttle conditions and proposed shuttle service conceptual plan. Transit ridership survey , fleet requirements and capital and operating costs shall be provided. All study products shall be provided in electronic format. A conceptual design for the recommended route, map and schedule improvements shall be prepared by the consultant. Promotional material for route enhancements shall be designed under the scope of this project.

The final report shall also include the following information:

- Shuttle Demand Forecast
- Service Concept

- Survey Results
- Equipment (types of buses that might meet the transportation needs)
- Operating Structure
- Operating Costs
- Sources of Operating Revenues

4.0 Project Schedule

The final design of the project must be completed by April 2015.

5.0 Responses

Firm shall submit one (1) hard copy OR one (1) electronic copy of the response (via email), which shall contain the following information:

1. Scope of services
2. Proposed fees for the scope of work identified herein, broken down by required tasks
3. Total Proposed fees (Price Form attached)

Responses are due on or before the close of business on Friday, December 19th, 2014. Late responses will not be accepted. Responses may be faxed, emailed or delivered to the contact provided below.

Fax: 305-259-1290

Email: KBada@palmettobay-fl.gov

Address: Village of Palmetto Bay
Attn: Kristy Bada
9705 E Hibiscus Street
Palmetto Bay, FL 33157

Questions concerning this request are to be addressed via email to KBada@palmettobay-fl.gov.

Sincerely,



Kristy Bada, Procurement Specialist
Village of Palmetto Bay



PRICE FORM

Project Title: **Engineering Services for Comprehensive Operational Analysis (COA) of Village Shuttle Bus Services**

Issued: Monday, December 15, 2014

Due Date: Friday, December 19, 2014

Item No.	Project Name	Total for Professional Services
COA1415	Comprehensive Operational Analysis (COA) of Village Shuttle Bus Services	
<i>TOTAL</i>		

Signature of Official: _____

Name (typed): _____

Title: _____

Date: _____

Vendor: _____

THE CORRADINO GROUP

Kristy Bada

Village of Palmetto Bay

Palmetto Bay, FL 331579705 East Hibiscus Street,

Palmetto Bay, Florida 33157

Tel: 305.259.1234 Email: KBada@palmettobay-fl.gov

RE: Engineering Services for Comprehensive Operational Analysis (COA) of Village Shuttle Bus Services.

Ms. Bada,

This is a proposal by The Corradino Group to provide a Comprehensive Operational Analysis of the iBus Service. In 2006, Corradino assisted the Village of Palmetto Bay in launching an intra-Village shuttle (iBus) to increase the mobility of residents and visitors, and provide for better accessibility of Village destinations via a fixed public transit route.

We understand that the purpose of this Comprehensive Operational Analysis is to evaluate the iBus shuttle service and provide insight into how it can evolve to best serve the residents and visitors of Palmetto Bay. Integral to this scope of services is the evaluation and development of an integrated feeder/shuttle bus system which connects to the US-1 Busway and to the transit circulators of the Village of Pinecrest and the Town of Cutler Bay. This study explores the existing and potential market for shuttle service within the Village of Palmetto Bay in order to:

- Determine whether the two existing routes should be reconfigured, discontinued, or consolidated.
- Evaluate the current operating model in light of the fiscal and market needs inherent in future development.

The Corradino Group, over its four decade existence, has focused on transit work. Few local firms are as well suited for this project as Corradino. We have developed the Cutler Bay and Palmetto Bay systems. Joe Corradino was instrumental in planning and evaluating the Pinecrest system as an elected official in that community. The firm planned the US-1 Bus lanes, and has performed the most recent alternatives analysis of the US-1 Corridor, as well as has conducted data collection for all of the South Dade MDT Routes. The Village and Corradino have won awards for the Palmetto Bay Transportation Master Plan and the Bicycle and Pedestrian Master Plan. Corradino has studied transportation, traffic, transit, bicycle and pedestrian movement, as well as land use, zoning and development in every community in South Dade. A large aspect of this success has been the firm's ability to work with the citizens of the community in a highly constructive manner. Corradino understand the community from its participation in the various area organizations, such as the Economic Development Council of South Dade and Chamber South.

Our transit projects have ranged from:

THE CORRADINO GROUP

- Local municipal circulator programs in Miami Dade County, not only here in Palmetto Bay, but in Miami Beach, Hialeah, Hialeah Gardens, Doral, Miami Gardens, and Cutler Bay.
- Heavy rail projects in Los Angeles and Miami;
- Light rail and people mover systems in Detroit;
- Bus rapid transit systems here on the Busways and I-95 Express;
- Statewide performance measures for transit systems in Florida, Michigan Illinois, Indiana, Ohio, and Kentucky;
- Siting of transit centers in: Coastal Link, Jupiter to Miami; Cleveland, Ohio; Springfield, Ill.; Missoula, Mont.; Jackson and Meridian, Miss., Muskegon and Traverse City, Mich.; and, Miami, Fla.

We feel we are the best for this job because, as you can see, we know transit and we know Palmetto Bay. We are very excited to have this opportunity to work with the Village staff again on this important project.

If the notice to proceed can be provided in early January 2015, this project can be concluded by April of 2015. It can be completed within 90 days for a cost of \$32,000.

Proposed Scope of Services:

This scope of services addresses each of the aspects specified in the RFP as well as those most relevant in a traditional COA for what the Village is trying to achieve. Each task contains a time line and proposed fee for the individual task. The total time frame is summarized in a table, and the Price form is attached.

Task 1 – Data Collection:

Time Frame: Day 1 – 30

Cost: \$11,000

Task 1 will provide for the data collection and analysis of existing conditions relevant to the evaluation of iBus operations.

Route Background Information:

The project will begin by documenting the existing status of the routes, including stops and transfer locations. This data will be mapped in GIS.

Ridership:

A key aspect of the ridership analysis is the evaluation of ridership counts to understand and assess current/potential transfer locations. Ridership counts of Miami-Dade Transit routes within

THE CORRADINO GROUP

the Village of Palmetto Bay will be obtained, as will those ridership counts for the Village of Pinecrest and the Town of Cutler Bay circulators. This will assist in determining the potential riders from those communities to destinations within Palmetto Bay.

The boarding and alighting survey is major undertaking and an extremely important data item, as it is necessary to support the Market Demand Analysis in Task 3. The boarding and alighting data will be used to examine route productivity issues, key trip generators, vehicle requirements, potential transfer opportunities, and the like. Corradino has conducted numerous boarding and alighting surveys for systems of all sizes including massive regional systems, most recently for the City of Rockford Illinois. The firm typically uses hand-held tablets and computers with all stops, routes and trips preprogrammed.

This will be done with surveyors riding each route on each loop and collecting data throughout the day. The Boarding's and alighting's will be time-stamped as they are collected to allow for the calculation of run time per trip and segment, schedule adherence and average speed. Data will be downloaded from the handheld or tablet devices and compiled into a ridership database that can then be queried to determine key performance factors such as total and average ridership by trip and route, boarding by stop, segment and trip and time of day, maximum load point, etc. The database will also be linked to a GIS-based map to graphically depict data such as boarding's and alighting's by stop, load factors and route productivity by segment.

Passenger Survey:

An onboard passenger interview survey will be conducted in order to generate a profile of the Palmetto Bay Circulator passengers; determine origins and destinations, trip frequency, and customer satisfaction; and, document the need for additional services and service coverage. The surveys will be conducted as passengers board the buses. Each route will be surveyed. The data can then be factored up to match ridership levels by route to obtain and form a profile of Palmetto Bay iBus passengers and trip characteristics. Corradino will provide all survey materials and tabulate all results. Using the data collected and industry standards and practices, a service standards policy will be developed to monitor each route's productivity. The survey results will be tabulated and analyzed.

Run Time Analysis:

A Run Time Analysis of each route shall be conducted, and will examine route's timetable. This study will factor in an evaluation of potential causes of delay through a review of existing traffic data, including roadway segments and at intersections along the circulator routes. The results of the analysis will be analyzed in Technical Memorandum 1, and will include a review of possible rerouting options, traffic signal retiming, or traffic signal priority for the routes.

Technical Memorandum No. 1 will provide the results of Task 1 and include the ridership counts, findings and data associated with the boarding and alighting survey and accompanying service standards policy for monitory route productivity, the passenger onboard survey, and the Run Time Analysis. Technical Memorandum No. 1 will be submitted in in hard copy and

THE CORRADINO GROUP

electronically. Corradino will also provide the Village of Palmetto Bay with all survey databases.

Task 2 – Study Oversight/Public Outreach:

Time Frame: Day 1 – Project Conclusion

Cost: \$3,000

Task 2 will provide for the study oversight and the public engagement components of the COA.

A kickoff meeting will be held with Village staff after the NTP within one week.

A steering committee will be formed consisting of Public Works Transit Operations, Planning and Zoning, Miami-Dade Transit, Village of Pinecrest Transit Operations, and Town of Cutler Bay Transit Operations. Meetings with the steering committee will be held at the start of the study after the NTP has been issued, after the submission of the draft Market Analysis technical memo, prior to the final draft of the report, and as desired by Village staff.

Three (3) public meetings will be held to inform the general public about the study and to solicit their input, and will be publicized to encourage current and potential riders to attend.

Stakeholder meetings are critical to a good transit plan. Interviews with major stakeholders, such as schools, businesses, churches, and service and community organizations located in Palmetto Bay will be conducted. During these meetings, it will be important to document the needs of the groups that the stakeholders represent, the vision of what they would like services to look like in the future (types of services and service area), and any upcoming developments within their organization or the group that they represent that would generate changes in the need for transportation. Minutes/summaries of all meetings and interviews shall be provided.

Task 3 – Market Analysis:

Time Frame: Day 20 – 50

Cost: \$9,000

Task 3 will evaluate the market for shuttle service within the Village of Palmetto Bay.

The Corradino Team will review the existing ridership profile and identify any unmet segments of the transit market. The market analysis will utilize ridership, survey, and community input data from Tasks I and II, in conjunction with data on the current and future land use in the Village to determine transit generators. In addition, census and survey data indicating the demographic make-up of the community and ridership, current iBus data, and the potential coverage of the iBus system in relation to the coverage area of existing transportation systems shall be utilized to determine the potential between existing marketed services and future needs.

Review Roadway, Land Use and Demographic Factors

THE CORRADINO GROUP

The Corradino Team will review roadway, land use and demographic changes in Palmetto Bay. Existing roadways and sidewalks data will be utilized to determine access points to the circulator and potential routing options. Land use changes will be accounted for by reviewing applicable land use plans and meeting with Planning and Zoning department staff. This data will provide a picture of past changes and also an idea of changes to come in the future, and where new transit generators are planned. Any new transit generators identified will be mapped and can then be compared to the existing service area and any potential expansion areas.

Community Conditions Summary

Using data from the onboard passenger interview survey in Task I and national trends, a summary of the potential transit market characteristics by population, employment, type of land development, age, school enrollment, auto ownership and the like will be developed.

Community/Ridership Attitude Assessment

Using data collected during the Task I onboard passenger interviews and stakeholder input sessions, perceptions of the existing system will be documented, as well as, the strengths and weaknesses of the existing services. In addition, stakeholder and rider priorities for service will also be documented.

Service Demand

Based on the demand for service and population in the existing service area, demand for mass transportation services within Palmetto Bay will be calculated. Using population projections, the anticipated demand for services will be calculated for the upcoming five-year period. New markets outside the existing service area will be documented.

The product of Task 3 will be **Technical Memorandum No. 2**, detailing the projected demand for service. Technical Memorandum No. 2 will be submitted in in hard copy and electronically. It will be submitted in draft form for review and comment by Village staff. A revised final version will be submitted incorporating Village staff comments.

Task 4 – Conduct an Individual Route Analysis for each Shuttle Route and Identify Service Improvements/Alternatives:

Time Frame: Day 30 – 60

Cost: \$9,000

Task 4 will evaluate opportunities to improve service, increase operating efficiency, reconfigure routes, provide new routes, and/or eliminate/consolidate routes as necessary.

Review Palmetto Bay iBus Data

Corradino will review all available Palmetto Bay iBus data as a means of documenting the history of changes in ridership, route productivity, funding and the like. The data will also assist in documenting the starting point for potential system changes and improvements. Data to be collected will include but not be limited to: the annual operating budget, daily service

THE CORRADINO GROUP

requirements, demographic/travel patterns, headway sheets, highway/street network information, listings of equipment and facilities, any prior marketing surveys and materials, operator labor agreements, passenger counts and fare classification, planned road improvements, productivity factors, public timetable and system route maps, route performance reports, route travel time data, work rules, and any other needed data.

Evaluate Each Specific Route

As part of Task 4, Corradino will evaluate each route in terms of performance and generators and create a profile of each route. The purpose of this task is to take the data collected in Tasks 1 and 3 and use it to evaluate the existing conditions. The Corradino Team will build upon any service modifications identified in previous tasks and incorporate any transfer point relocations as necessary for improved efficiency and connectivity with other route systems. Both routes in the Palmetto Bay system will be evaluated. As part of this task, The Corradino Team will also plot current and future shelter placement needs on a map. It may not necessarily be applicable in Palmetto Bay, but as with any changes to a transit system, consideration will be given to Title VI and Environmental Justice regulations and guidance.

Corradino will work with Village Staff to develop criteria upon which to evaluate current performance and potential service alternatives. The evaluation criteria will be a mix of qualitative and quantitative criteria. Local performance expectations will make up the qualitative component of the evaluation criteria, while thresholds based on current performance standards, and the operating experience of other local systems will be the basis for the quantitative component of the evaluation criteria. The proposed set of evaluation criteria will be submitted to the Village staff for review and approval.

Current Performance Review

This will be done on a route by route basis using data collected during Task 1. Using the boarding and alighting data, route productivity can be shown by stop and also by route segment. A profile of each route will be developed, listing the route's strengths and weaknesses along with accompanying graphics that will visually show ridership activity along the route. An analysis of this type can clearly point to the development of more productive routing.

Routes are typically evaluated for productivity in terms of passengers per hour and/or passengers per mile. This will be compared with other municipal systems in the regional as well as with MDT routes in the area.

Performance Trendline/Performance Measures

Using the boarding and alighting data collected in Task 1 and revenue hours and/or miles by route and combining this with industry standards and practices, performance measures will be established. In addition, a Service Standards Policy will be developed that can be used to monitor the productivity of each route. This Service Standards Policy will guide the Village of Palmetto Bay in determining how and when to modify service if a route is not performing at an acceptable level.

THE CORRADINO GROUP

Internal Cost Reduction

An efficiency and effectiveness study on dwell times will be conducted. Time-related data from the boarding and alighting counts and Run Time Analysis will be used to conduct this analysis. A set of recommendations including potential internal cost reductions will be developed. It is possible that additional route coverage can be substituted for some dwell times or that by eliminating inefficient segments of routes and re-routing, some locations with excessive dwell times may be eliminated.

Alternative Route Structures

Based on the projected demand for transit services as well as new transit generators identified through the review of growth areas conducted during Task 1, alternative route structures that will most effectively serve current and projected needs will be developed for each route. The potential for changes in scheduling (i.e. time of day, reduced headways, etc.) and span of service shall be evaluated as a component of alternative route structuring. The alternative route structures will be based on population and location of transit generators, both existing and future. All alternative routing structures will be detailed in terms of cost. A cost allocation model will be developed for Palmetto Bay that breaks down the fixed and variable costs for the service by cost per hour, cost per mile and cost per peak vehicle. These incremental costs can then be used to determine the cost impact of modifying existing routes and also adding new service. Capital needs will also be included such as the cost of additional vehicles and facilities if needed.

Evaluation of Route Structures will, at a minimum, consider:

- The need for deviated routes as opposed to standard fixed routes with complementary paratransit;
- Benefits and detriments of linking routes;
- Analysis of transfer locations/times to determine the efficiency of route connectivity; and,
- Assessment of the feasibility of express and limited stop services.

The Corradino Team will utilize the results of Task 3 to conduct an analysis of expansion opportunities to areas not currently served by the shuttle. The expansion analysis will include consideration of how expansion will impact the existing system.

Service alternatives will be evaluated based on the following three scenarios:

- A cost neutral scenario that is consistent with existing funding levels; and,
- An expansion scenario that includes alternatives and services that exceed the existing funding levels; and,
- A reduction scenario that could be put in place in the event of funding cuts that would minimize ridership impacts.

The service alternatives and scenarios will all be mapped as applicable and include both capital and operating costs, vehicle, equipment and facility requirements, potential funding sources and

THE CORRADINO GROUP

a proposed timeline for implementation. The Corradino Team will detail all costs incurred for each alternative. These will include all operating costs as well as capital costs.

Alternative Modes

Corradino will compare Village services to other transportation alternatives including the automobile, ridesharing, cycling and walking. The costs, advantages and disadvantages of each mode will be quantified using accepted industry calculations. All evaluation methods will be thoroughly referenced. The potential for other mechanisms for service provisions, such as employer sponsored services, vanpools, ridesharing, or demand response services shall also be examined.

Implementation Plan

Corradino will develop suggested changes to the preferred alternative(s) and review them with the Village staff. The proposed plan will then be documented with the preferred alternative(s) and any necessary modifications.

The product of Task 4 will be **Technical Memorandum No. 3**. It will document all results and findings from Task 4, including the final set of evaluation criteria and the recommended preferred alternative. It will be submitted in draft form for review by the Village staff. Upon review and any required edits, a brief Executive Summary will be developed.

Task 5 – Final Report:

Time Frame: Day 90

Cost: \$1,000

Corradino will provide a final report to the Village of Palmetto Bay which will combine information from previous tasks and provide an overall plan which connects to Miami-Dade Transit at the US-1 busway, and to the Village of Pinecrest and the Town of Cutler Bay Circulators. Corradino will provide an executive summary detailing existing shuttle conditions, fleet requirements, and proposed capital and operating costs. A conceptual design for the recommended route, map, and schedule improvements will be prepared along with promotional materials for route enhancements. All study products will be provided in electronic format.

The final report shall also include the following information:

- Shuttle Demand Forecast
- Service Concept
- Survey Results
- Fleet requirements/Equipment (types of buses that might meet the transportation needs)
- Operating Structure
- Operating Costs
- Sources of Operating Revenues

THE CORRADINO GROUP

Palmetto Bay
 Comprehensive Operations Analysis
 Schedule

Task	Cost	Month	January				February				March			
		Day	1	14	21	30	37	45	52	60	67	75	82	90
Task 1: Data Collection	\$ 10,000		■	■	■	■								
Task 2: Outreach	\$ 3,000		■	■	■	■	■	■	■	■	■	■	■	■
Task 3: Market Analysis	\$ 9,000				■	■	■	■						
Task 4: Route Analysis	\$ 9,000						■	■	■	■				
Task 5: Final Report	\$ 1,000													■
	\$ 32,000													

THE CORRADINO GROUP



PRICE FORM

Project Title: Engineering Services for Comprehensive Operational Analysis (COA) of Village Shuttle Bus Services

Issued: Monday, December 15, 2014

Due Date: Friday, December 19, 2014

Item No.	Project Name	Total for Professional Services
COA1215	Comprehensive Operational Analysis (COA) of Village Shuttle Bus Services	
	TOTAL	\$32,000

Signature of Official: _____

Name (typed): Joseph M. Corradino, AICP

Title: President

Date: 12/19/14

Vendor: The Corradino Group

9705 East Hibiscus Street, Palmetto Bay, Florida 33157
Tel: 305.239.1234 • Fax: 305.239.1290

RESOLUTION NO. 04-101

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, RELATING TO A CIRCULATOR ASSESSMENT STUDY IN THE VILLAGE OF PALMETTO BAY; AUTHORIZING THE VILLAGE MANAGER TO ENTER INTO CONTRACT WITH THE CORRADINO GROUP, INC. TO PROVIDE THIS SPECIALIZED TRANSIT STUDY AND TO APPROVE EXPENDITURE OF FUNDS IN AN AMOUNT NOT TO EXCEED \$33,000.00; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Village wants to examine the need and cost of a potential circulator transit service in the Village of Palmetto Bay; and

WHEREAS, the legislative requirement of the Peoples Transportation Plan is the expenditure of twenty percent of the funding is designated for transit use; and,

WHEREAS, the Administration has determined that The Corradino Group, Inc., is a capable firm and qualified to provide transit recommendations, and cost for the circulator services that meet the needs of the Village of Palmetto Bay and implementation strategies in accordance with approved recommendations; and

WHEREAS, the Administration desires to select The Corradino Group, Inc., to study the need and the desire for a circulator bus service within the boundaries of the Village; and

NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, AS FOLLOWS:

Section 1: The Village Manager is authorized to contract for Traffic Engineering Services with The Corradino Group, Inc. and approve expenditure of funds in an amount not to exceed \$33,000 on a study to evaluate potential circulator transit services in the Village of Palmetto Bay.

Section 2: This Resolution shall take effect immediately upon approval.

PASSED and ADOPTED this 6th day of December, 2004.

ATTEST:

Meighan Pier
Meighan Pier
City Clerk

APPROVED:

Eugene P. Flinn
Eugene P. Flinn
Mayor

READ AND APPROVED AS TO FORM:

Eve A. Bouzsis
Eve A. Bouzsis
Village Attorney

FINAL VOTE AT ADOPTION:

Council Member Ed Feller	<u>YES</u>
Council Member Paul Neidhart	<u>YES</u>
Council Member John Breder	<u>YES</u>
Vice-Mayor Linda Robinson	<u>YES</u>
Mayor Eugene P. Flinn	<u>YES</u>

K:\Users\cpatterson\resolution\December Agenda\circulator transit services.doc

The CORRADINO Group

SCOPE of WORK

Village of Palmetto Bay Circulator Assessment

OBJECTIVE:

The goal of this study is to assess the need and cost of potential circulator transit services in the Village of Palmetto Bay

BACKGROUND:

As specified in the Palmetto Bay Transportation Master Plan and with the advent of the Peoples Transportation Plan, municipalities in Miami-Dade County have been charged by the citizens of the county to improve local transportation service and options. One of the legislative requirements of the PTP is the expenditure of at least 20% of annual revenues from this tax for transportation projects specifically related to transit.

PREVIOUS WORK:

Palmetto Bay has not studied the provision of specialized transit within its boundaries. The City believes that the provision of such service, if needed and cost effective, can add to the quality of life of the community.

COST:

This study can be provided for a cost of \$33,000

METHODOLOGY

TASK 1: Existing Conditions

This task will assess the existing conditions in Palmetto Bay as they relate to transportation and transit.

- 1.1 Regional
This will include a brief history of the City and previous transportation initiatives.
- 1.2 Comprehensive Plan
An examination of the current Comprehensive Plan particularly the Transportation Element.
- 1.3 Future Growth
Population projections will be examined to determine potential need.
- 1.4 Current Demographics:
An examination of demographic and socio-economic conditions will influence transit planning and service delivery issues.
- 1.5 Transit Propensity Analysis:

The **CORRADINO** Group

This sub-task will provide an understanding of the spatial arrangement of certain demographic characteristics that typically influence transit use. Given resource constraints, transit service will focus where there is the greatest overall need.

1.6 Currently MDT Service Level

An understanding of the existing MDT service is imperative. The idea of this circulator is to enhance existing service, not to duplicate it.

1.7 Traffic Generators

An understanding of land uses, developments, facilities, activity centers, institutions that attract people is important in the location of transit routing.

TASK 2: Recommend Circulator System

Based on the examination of the existing and background conditions, and meetings held with stakeholders, a system will be recommended. The operational characteristics of this system will be developed.

2.1 System Routing and Operating Characteristics

The systems route will be mapped, headways will be estimated as well as the duration of travel time, and cost in man power and rolling stock, that the system would take to operate.

TASK 3: Implementation Strategy

The general parameters of the proposed system will be examined in greater detail. This will include an analysis of:

- Vehicle Fleet Requirements
- Personnel Requirements

3.1 Cost Estimates

3.2 Service Options

This will deal with the examination of options varying from self operation, utilization of a private operator, or contracting nearby systems, combining systems with adjacent communities or contracting with MDT.

TASK 4: Public Involvement

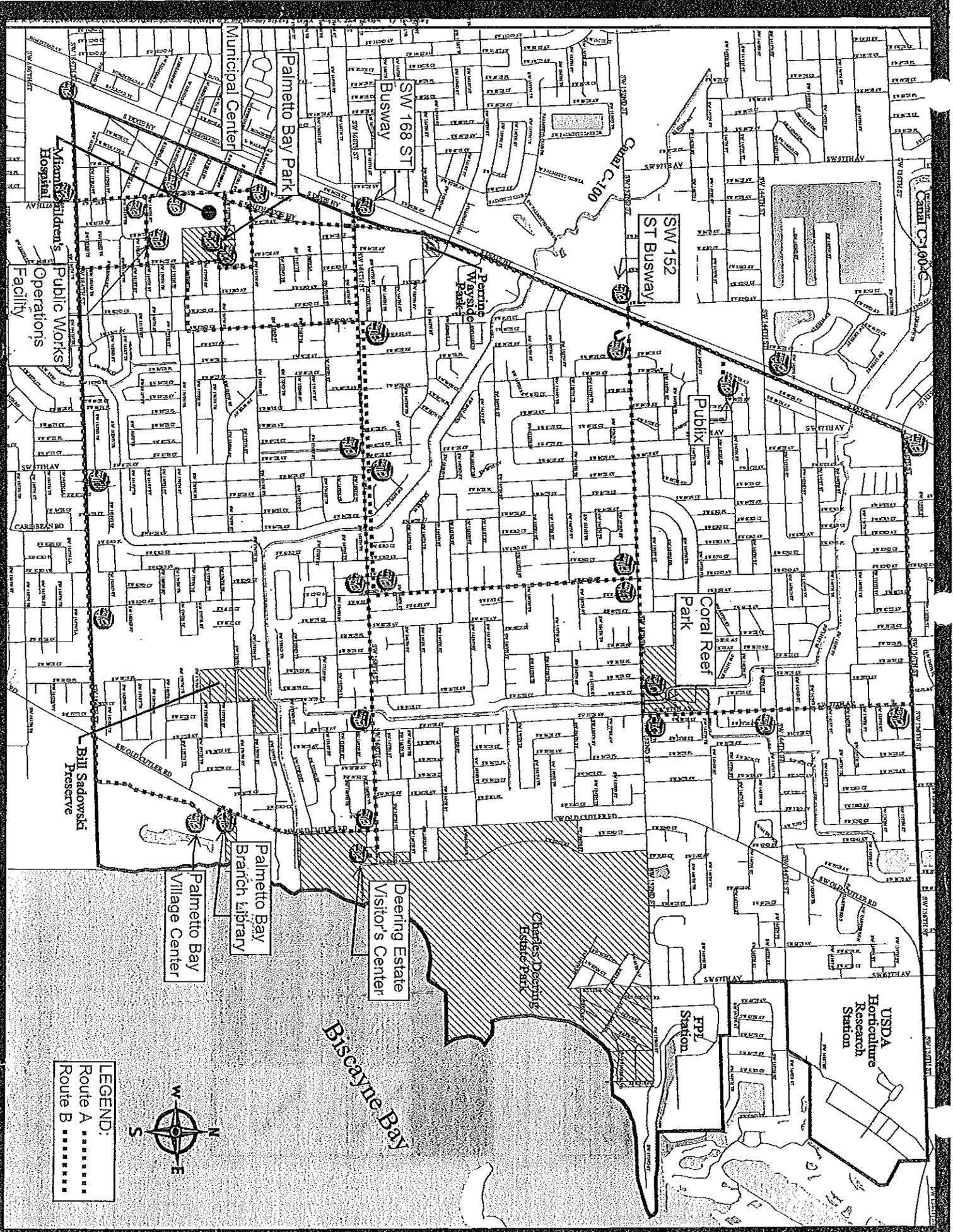
This task will focus on stakeholder meetings to be held individual or in small groups. Stakeholders may include City staff, administration or leadership, concerned citizens or community activists. Public presentations for discussion will be held before the City Council. A

The CORRADINO Group

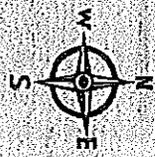
public opinion survey may be developed to gauge desire for such a system.

TASK: 5 Final Report

A final report will be produced as will a PowerPoint presentation of that report. Drafts will be delivered to the City for review. After the final presentation, 10 bound copies will be made available.



LEGEND:
 Route A —————
 Route B - - - - -



Biscayne Bay

Deering Estate
 Visitor's Center

Palmetto Bay
 Branch Library

Palmetto Bay
 Village Center

Bill Sadovschi
 Preserve

FPI
 Station

USDA
 Horticulture
 Research
 Station

Coral Reef
 Park

Publix

Parline
 Wayside
 Park

Palmetto Bay Park

Municipal Center

Miami Children's
 Hospital
 Public Works
 Operations
 Facility

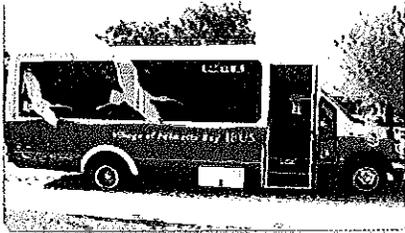
SW 152
 ST Busway

SW 168 ST
 Busway

Canal C-100

Canal C-100-C

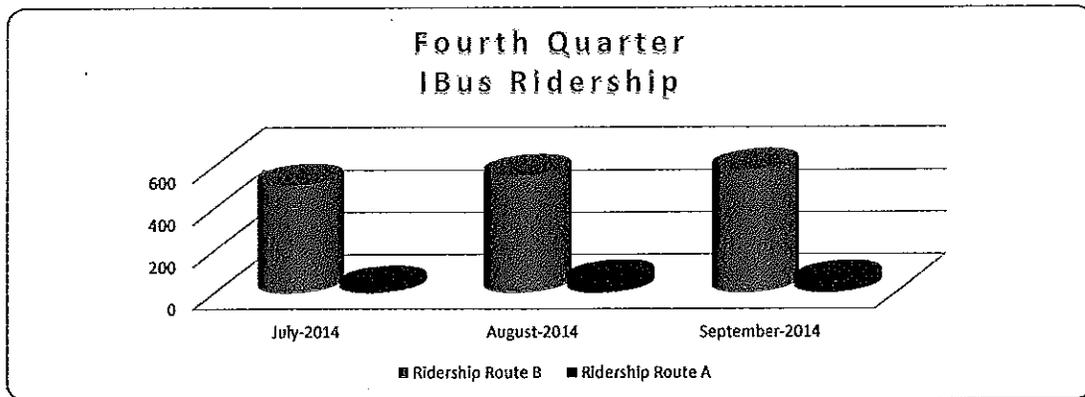
Charles Deering
 Estate Park



Village of Palmetto Bay ■ IBUS

Shuttle Services

Month-Year	Ridership Route A	Ridership Route B	Daily Average
July-2014	27	510	24.4
August-2014	54	554	29.0
September-2014	49	580	30.0
Total	130	1644	27.8



Popular Destinations
Palmetto Bay Village Center ; 7am - 9am & 3pm-5pm
168 ST / Old Cutler Road; 7am - 9am & 3pm-5pm
168 St / Busway; 7am - 9am & 3pm-5pm
Village of Palmetto Bay Branch Library; 3pm-4pm
184 St / Busway; 7am - 9am & 3pm-5pm



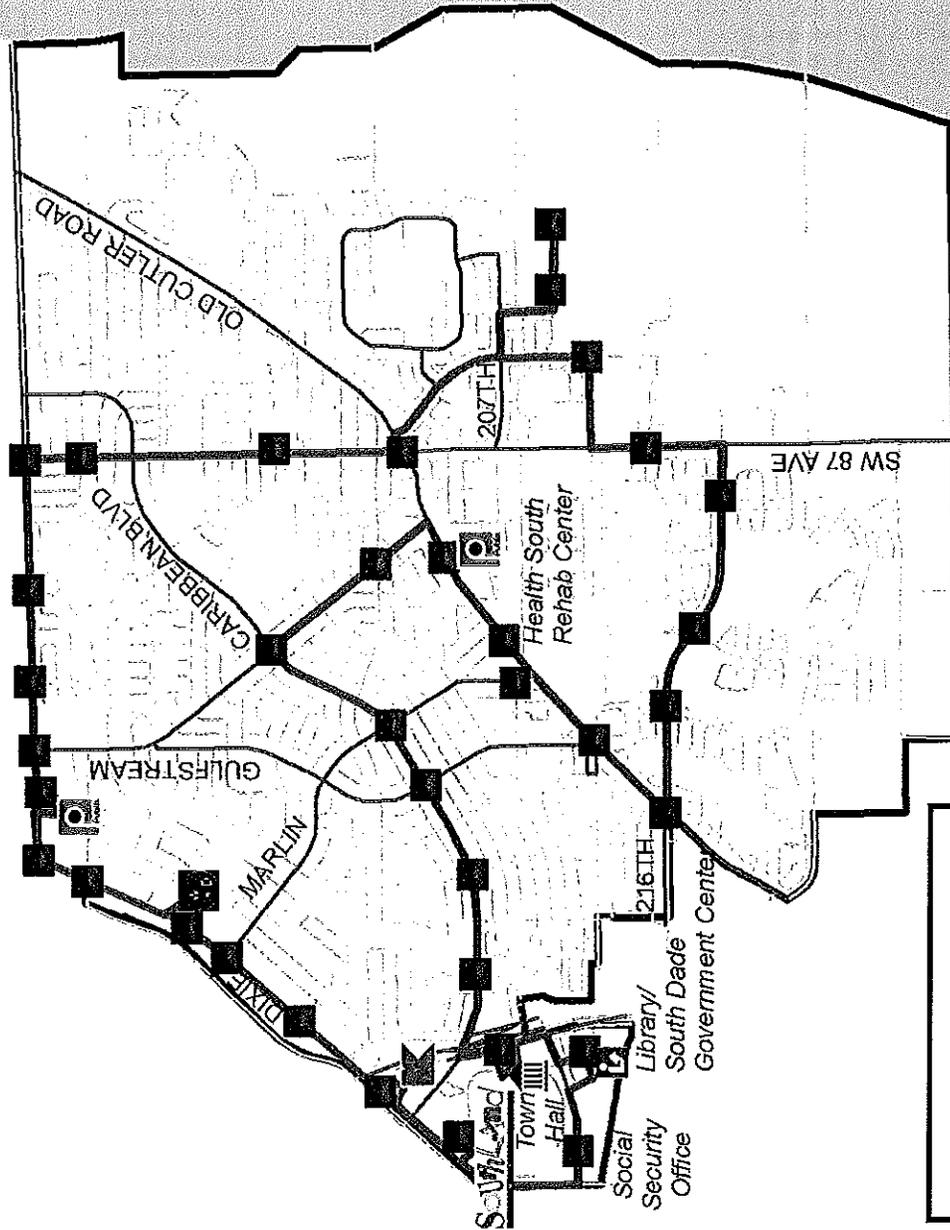
Town of Cutler Bay Municipal Circulator

Days of Service:
Monday thru Friday

Operating Hours:
8:35 AM to 5:35 PM

For Additional Route
Information Please
Call Town Hall
(305) 234-4262

Cutler Bay Circulator



-  Bus Stops
-  Cutler Bay Circulator
-  Cutler Bay Streets
-  Cutler Bay Boundary

THE CORRADINO GROUP

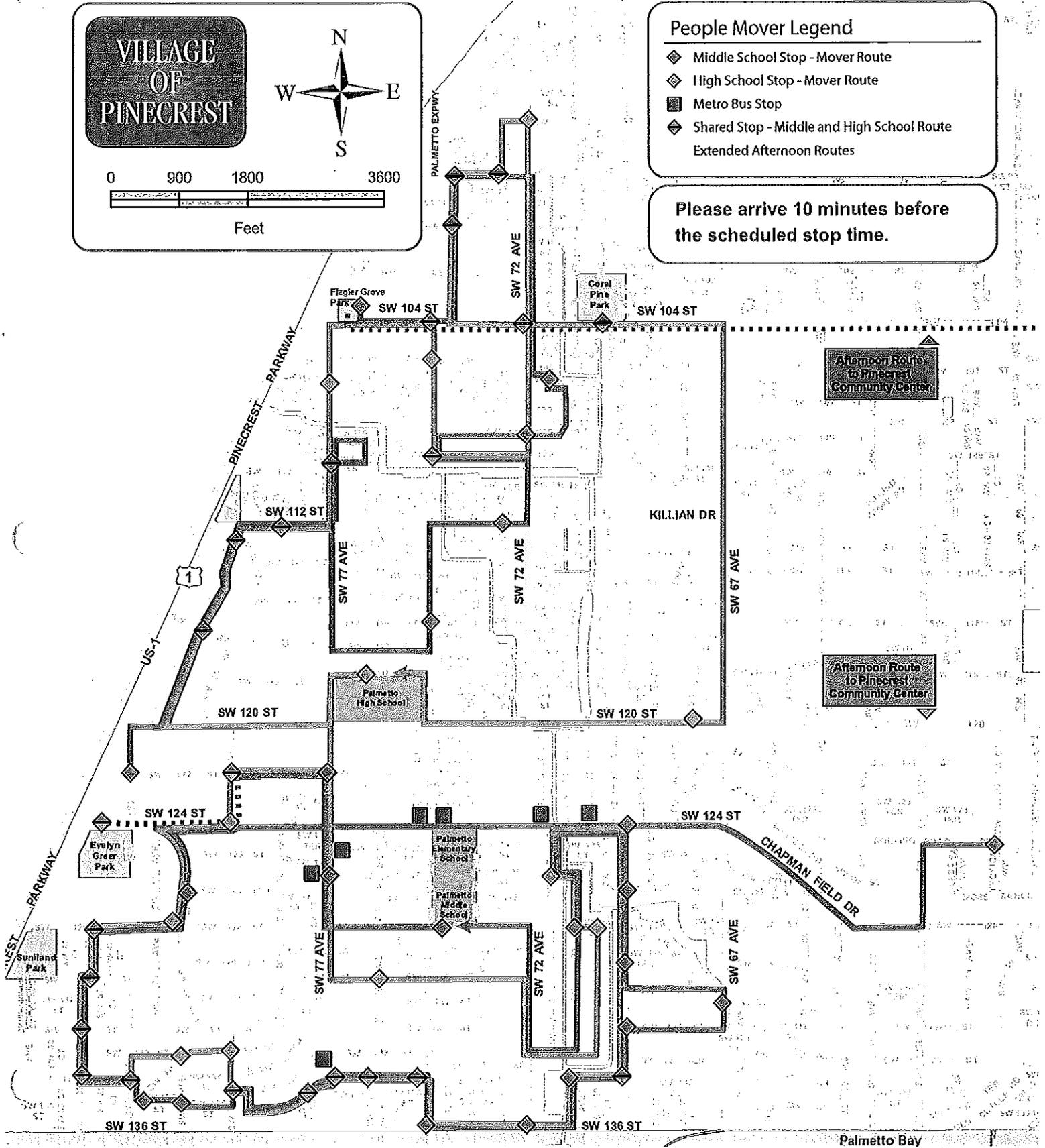
VILLAGE OF PINECREST

0 900 1800 3600
Feet

People Mover Legend

- ◆ Middle School Stop - Mover Route
- ◆ High School Stop - Mover Route
- Metro Bus Stop
- ◆ Shared Stop - Middle and High School Route
Extended Afternoon Routes

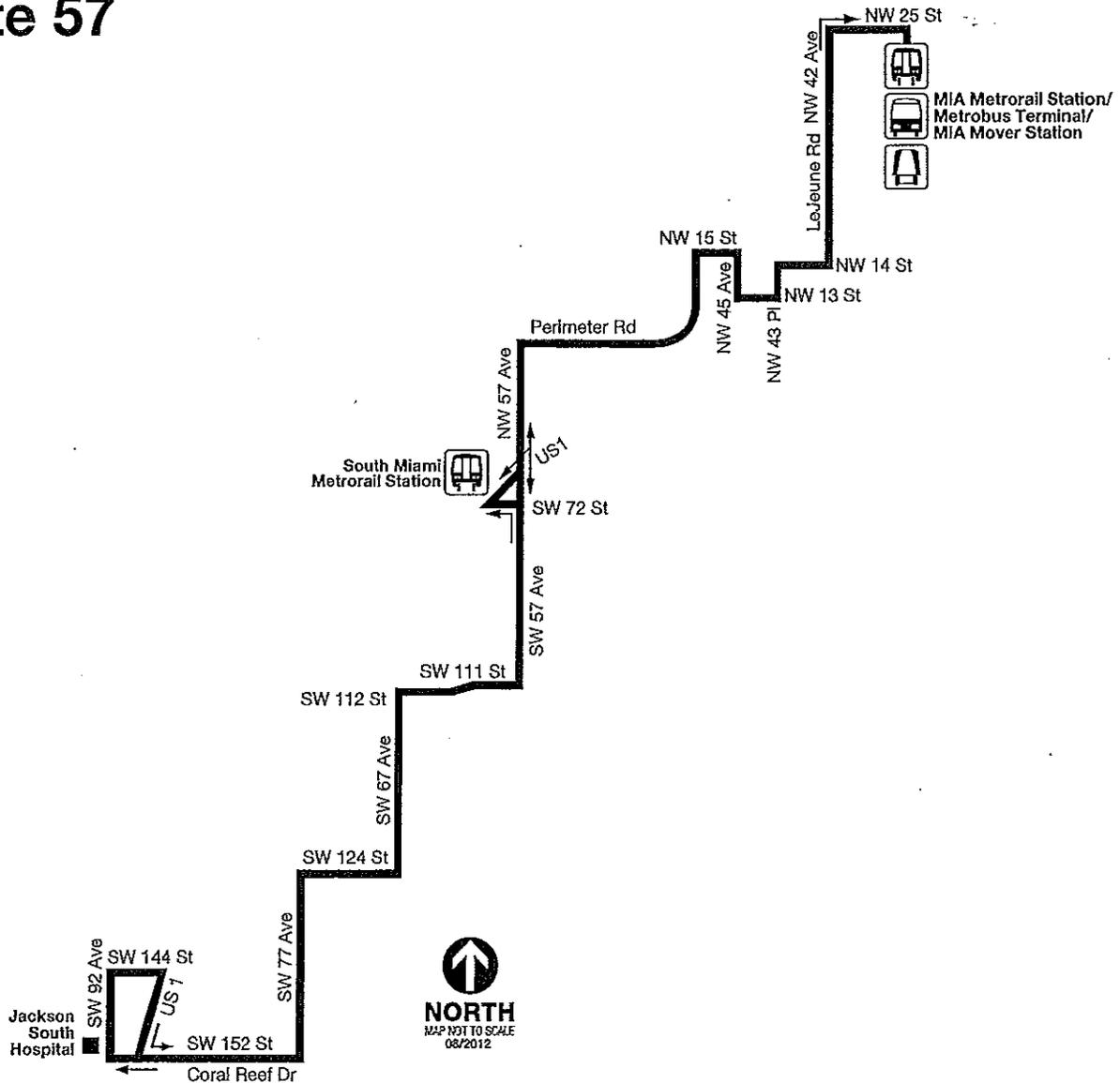
Please arrive 10 minutes before the scheduled stop time.



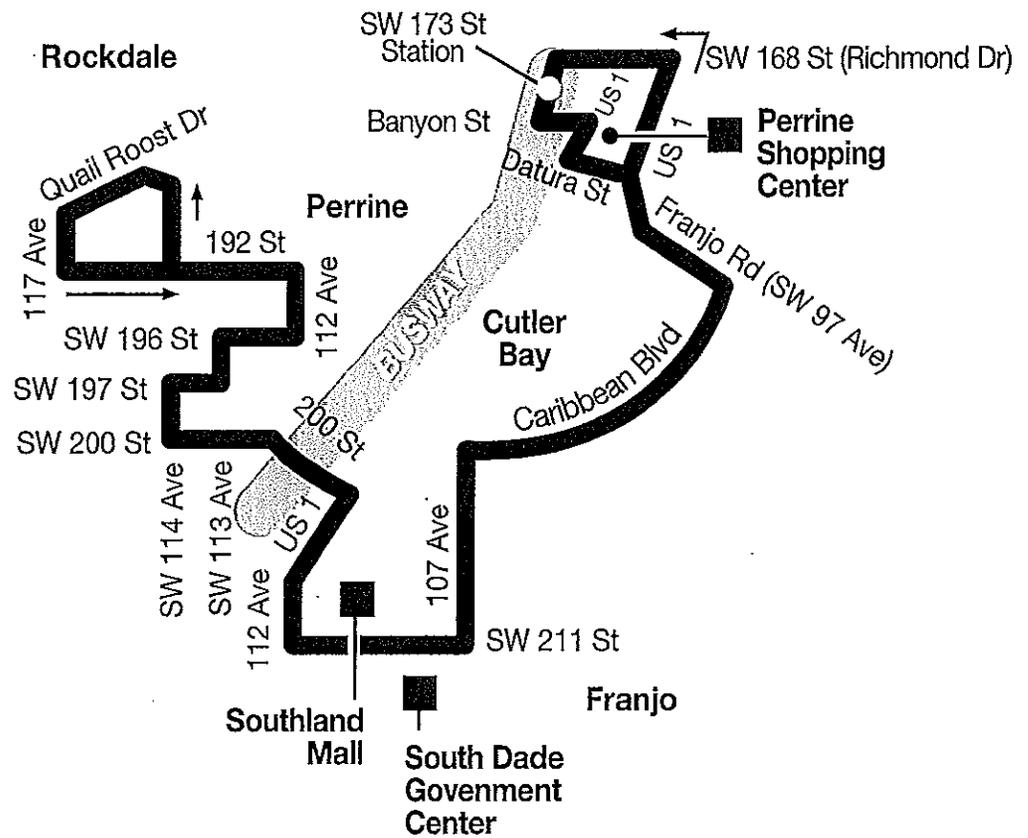
Afternoon Route to Pinecrest Community Center

Afternoon Route to Pinecrest Community Center

Route 57

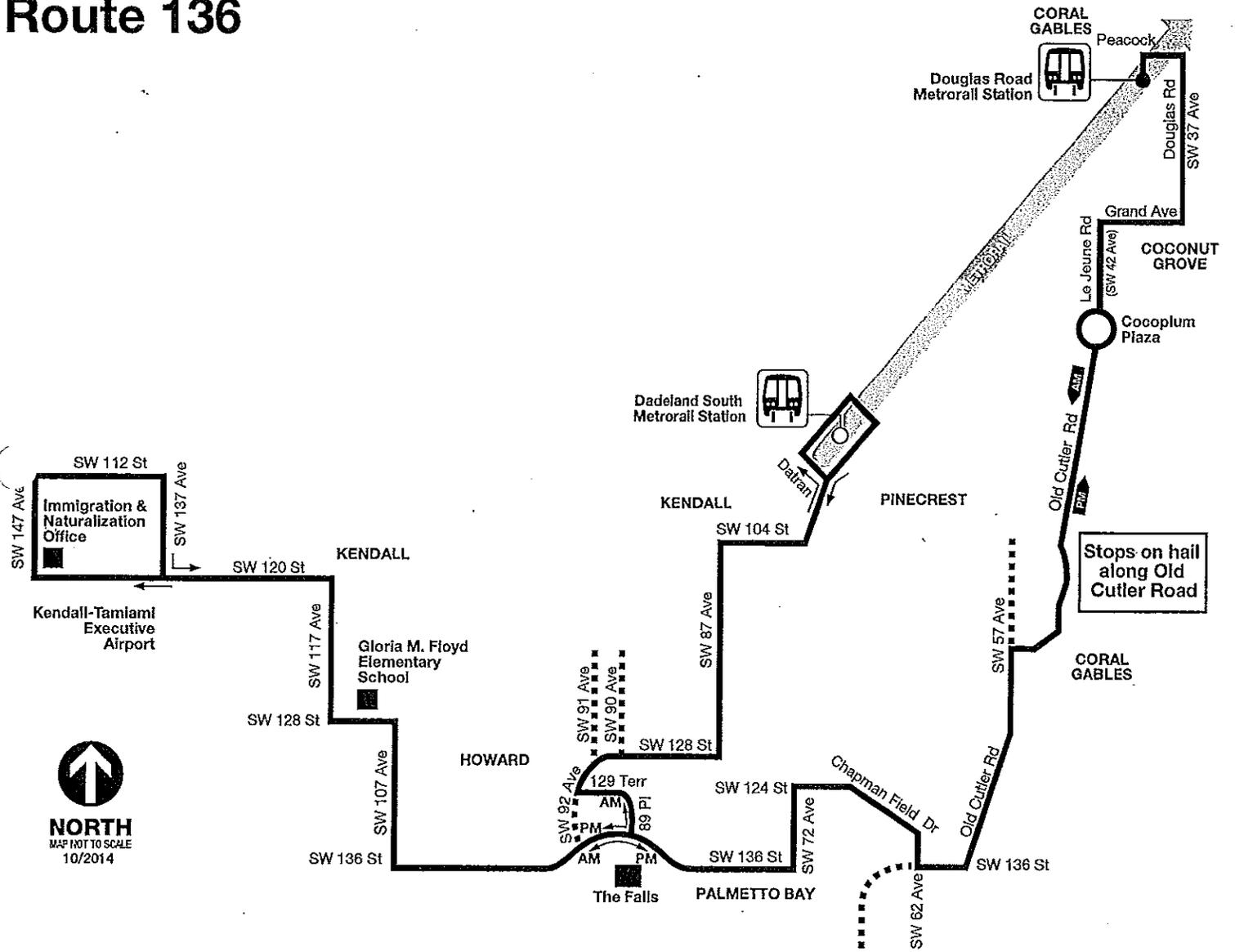


Route 1



NORTH
MAP NOT TO SCALE
12/2009

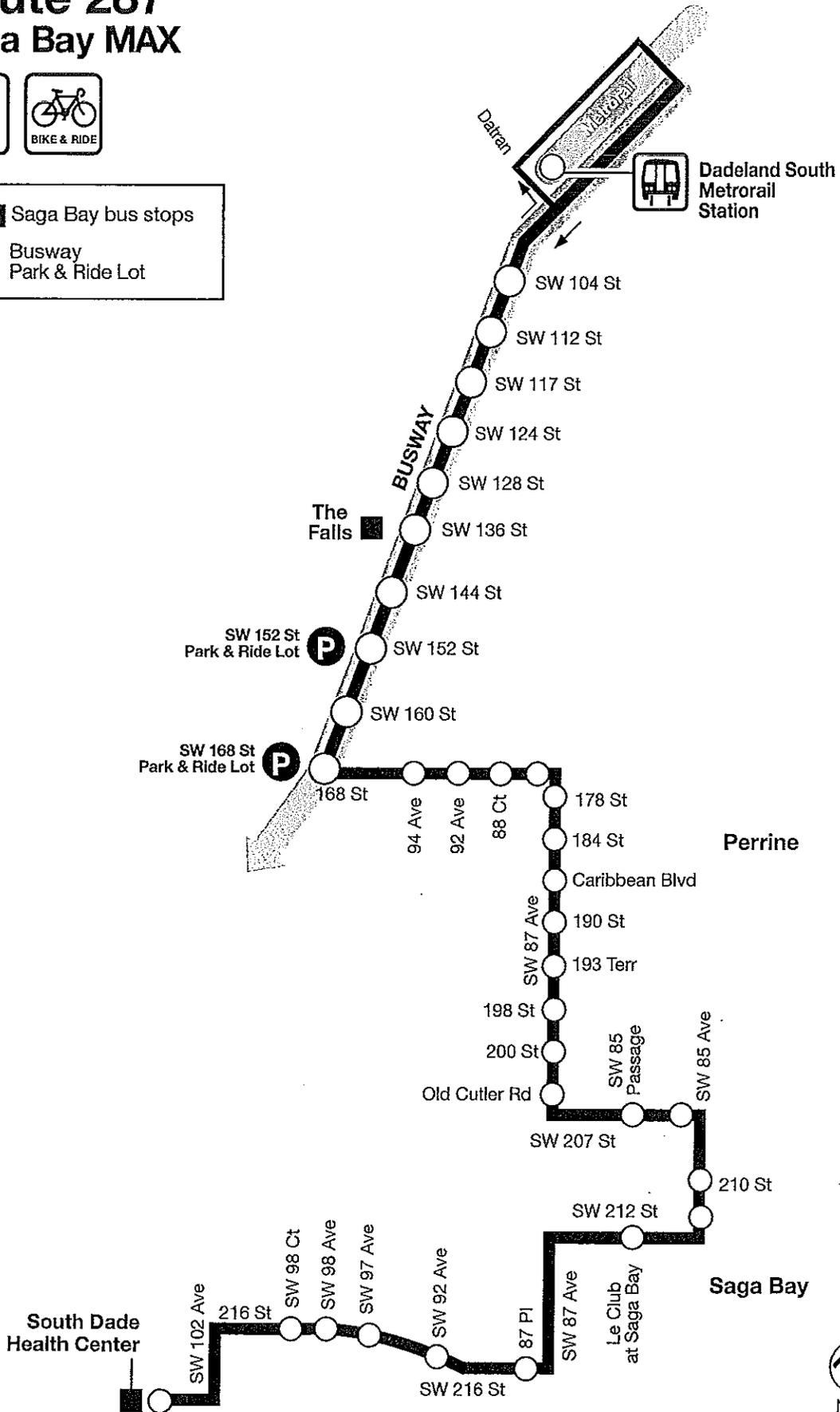
Route 136



Route 287 Saga Bay MAX



Saga Bay bus stops
 Busway Park & Ride Lot



RESOLUTION NO. _____

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, RELATING TO THE TREE ADVISORY BOARD, APPOINTING A MEMBER TO THE VILLAGE OF PALMETTO BAY TREE ADVISORY BOARD; AND, PROVIDING AN EFFECTIVE DATE. (Sponsored by Councilman Karyn Cunningham)

WHEREAS, on January 12, 2009, the Village of Palmetto Bay, through adoption of Ordinance 09-02, created the Village of Palmetto Bay Tree Advisory Board to promote the general welfare and to encourage the preservation of green space and the environment by reviewing and making recommendations as to developing and administering a comprehensive tree management program. Additionally, the Tree Advisory Board would assist the Village in developing an urban or community forestry program, and ultimately, an annual, systematic management of the Village's tree resources, including, tree planting, maintenance and removal program for trees on streets, parks and other public places;

WHEREAS, Ordinance 09-02 defines the membership, meeting requirements, conflict of interest, and duties of the Tree Advisory Board. There currently exists a vacancy in this Board.

NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, AS FOLLOWS:

Section 1. The following individual is appointed:

Anthony Sabbag (2 year term – Appointment by Councilwoman Cunningham)

Section 2. This resolution shall take effect immediately upon approval.

PASSED and ADOPTED this ____ day of March, 2015.

Attest: _____
Meighan J. Alexander
Village Clerk

Eugene Flinn
Mayor

APPROVED AS TO FORM AND LEGAL SUFFICIENCY FOR THE USE AND RELIANCE OF THE VILLAGE OF PALMETTO BAY ONLY:

Dexter W. Lehtinen
Village Attorney

1
2
3
4
5
6
7
8
9
10
11
12
13
14

FINAL VOTE AT ADOPTION:

Council Member Katryn Cunningham _____

Council Member Tim Schaffer _____

Council Member Larissa Siegel Lara _____

Vice-Mayor John DuBois _____

Mayor Eugene Flinn _____



To: Honorable Mayor and Village Council

Date: February 23, 2015

From: Ron E. Williams, Village Manager

Re: Downtown Palmetto Bay
Economic & Market
Assessment Report

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, RELATED TO THE DOWNTOWN REDEVELOPMENT INITIATIVE, ACCEPTING THE ECONOMIC AND MARKET ASSESSMENT REPORT AND SUPPLEMENTAL APPENDIX COMPLETED BY BERMELLO, AJAMIL & PARTNERS FOR THE FUTURE DOWNTOWN PALMETTO BAY AREA; AND PROVIDING AN EFFECTIVE DATE.

BACKGROUND AND ANALYSIS

Last year, the Village entered into an agreement with the firm of Bermello, Ajamil & Partners to conduct an economic study and a market profile for the future downtown area. The purpose of the study was to identify the number of businesses and residents that the local market could realistically absorb. Along with other important considerations, these figures would assist in identifying the final development patterns that are appropriate for the area, at least from an economic perspective.

Bermello, Ajamil & Partners, retained Lampert Advisory to complete the study. Lampert Advisory is a professional advisory group that is well known for their ability to develop realistic projections. The Village also requested for the consultant to identify the potential economic benefits of the proposed downtown redevelopment effort. The findings and recommendations are presented on the attached Economic and Market Assessment Report and Supplemental Appendix. A presentation on the preliminary findings was made to the Village Council on April 7, 2014, and a final presentation was made on February 2, 2015. During this meeting, Council directed staff to bring the presentation to a Special Meeting after several concerns and questions were raised.

FISCAL/BUDGETARY IMPACT

None at this time, since the cost for the study, totaling \$34,100 was approved with the adoption of Resolution 2014-06, and there are no further costs associated with the study.

RECOMMENDATION

Approval is recommended.

RESOLUTION NO. _____

A RESOLUTION OF THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, RELATED TO THE DOWNTOWN REDEVELOPMENT INITIATIVE, ACCEPTING THE ECONOMIC AND MARKET ASSESSMENT REPORT AND SUPPLEMENTAL APPENDIX COMPLETED BY BERMELLO, AJAMIL & PARTNERS FOR THE FUTURE DOWNTOWN PALMETTO BAY AREA; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, last year, the Village entered into an agreement with Bermello, Ajamil & Partners to conduct an economic study and market profile and prepare an economic development guidance document for the future Downtown Palmetto Bay area; and,

WHEREAS, the purpose of such study was to assess the level of absorption that the local economic market could sustain in order to finalize recommendations for the development patterns of the downtown area; and,

WHEREAS, Bermello, Ajamil & Partners, retained Lampert Advisory to complete the study, inclusive of identifying the potential economic benefits of the proposed downtown redevelopment effort; and,

WHEREAS, the findings and recommendations deriving from the study, along with the economic benefits information, are presented on the attached Economic and Market Assessment Report and Supplemental Appendix.

NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND VILLAGE COUNCIL OF THE VILLAGE OF PALMETTO BAY, FLORIDA, AS FOLLOWS:

Section 1. The final Economic and Market Assessment Report and Supplemental Appendix, attached hereto as Attachment A, are hereby approved.

Section 2. This Resolution shall become effective upon the date of its adoption herein.

PASSED AND ADOPTED this _____ day of February, 2015.

Attest: _____

Meighan J. Alexander
Village Clerk

Eugene Flinn
Mayor

APPROVED AS TO FORM AND LEGAL SUFFICIENCY FOR THE USE
AND RELIANCE OF THE VILLAGE OF PALMETTO BAY, FLORIDA ONLY:

Dexter W. Lehtinen
Village Attorney

FINAL VOTE AT ADOPTION:

Council Member Karyn Cunningham _____

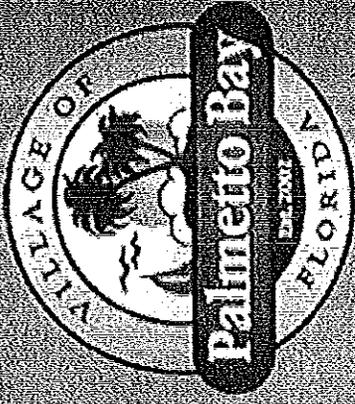
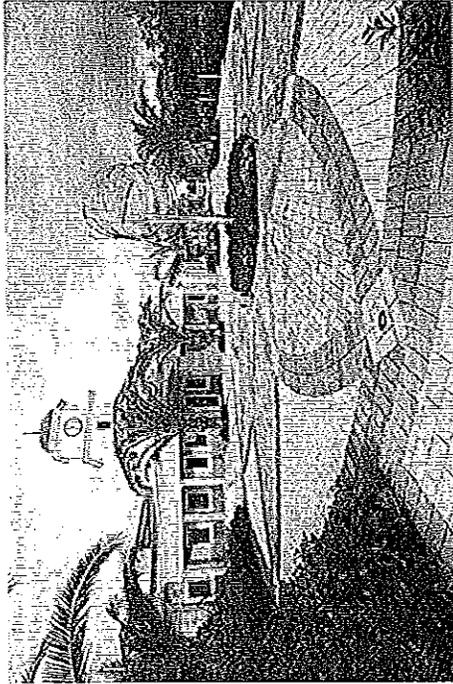
Council Member Tim Schaffer _____

Council Member Larissa Siegel Lata _____

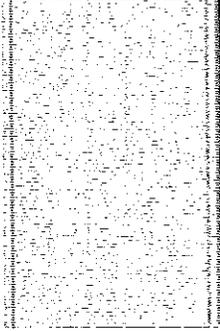
Vice-Mayor John DuBois _____

Mayor Eugene Flinn _____

ATTACHMENT "A"



***Village of Palmetto Bay – Downtown Master Plan
(Economic and Market Assessment) (April 2014)***





Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

TABLE OF CONTENTS

SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS2

SECTION 1: STUDY AREA DEFINITIONS7

SECTION 2: ECONOMIC AND DEMOGRAPHIC PROFILE10

2a: Population & Households Profile10

2b: Employment and Wages13

2c: Economic and Demographic Profile Conclusions15

SECTION 3: RESIDENTIAL MARKET ANALYSIS AND DEMAND ESTIMATE17

3a: Housing Market Overview17

3b: Housing Demand Analysis20

SECTION 4: OFFICE MARKET ANALYSIS23

4a: Office Market Overview23

4b: Office Demand Analysis28

SECTION 5: RETAIL MARKET ANALYSIS AND DEMAND ESTIMATE29

5a: Retail Market Overview29

6b: Retail Demand Analysis33

APPENDIX

Attachment 1: Village of Palmetto Bay Trade Area – Profile of Select Rental Apartments

Attachment 1: Downtown Palmetto Bay Housing Demand Model

Attachment 2: Downtown Palmetto Bay Trade Area Resident Retail Demand Analysis (Model)

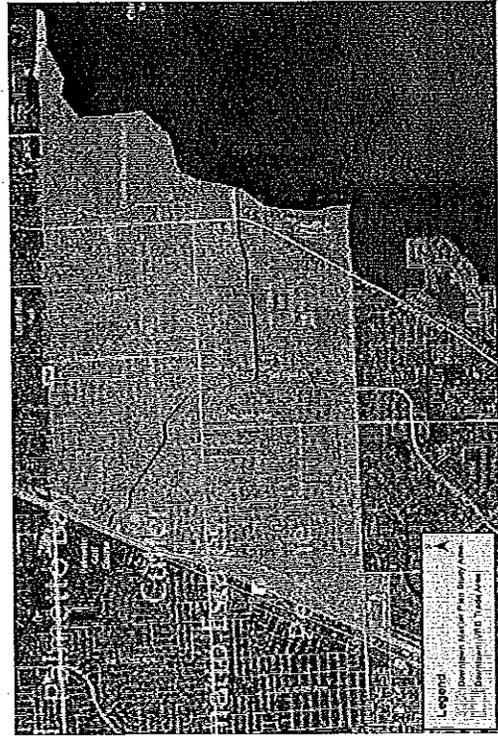


SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS

Lambert Advisory (Lambert) was engaged by Bermello, Ajamil & Partners (B&A), the Prime Consultant to the Village of Palmetto Bay) to provide the economic and market analysis associated with the Downtown Master Plan. A primary objective of the Downtown planning process is to identify the opportunity for a mixed use development which emphasizes a sense of place and destination for the residents of the Village.

Lambert has completed its economic and market analysis of the real estate demand potential for the proposed Downtown area. The body of this report includes our assessment of market conditions and trends impacting residential and commercial development proposed to be integrated within the Downtown Master Plan. The opportunity for development within the Downtown area is primarily based upon the market supply and demand conditions within Miami Dade County, the Village of Palmetto Bay and the Downtown Trade Area - as illustrated below and discussed in detail in Section 1 of this report.

Figure 1: Village of Palmetto Bay – Downtown Trade Area and Downtown Area Boundary Map





Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

This section provides a highlight of conclusions with a summary of demand estimates (by use), as well as strategic recommendations to help guide the Downtown Master Plan. The estimates of demand and recommendations herein have been prepared in the effort to understand and define the market-driven housing and commercial development opportunities for the Downtown Master Plan. Importantly, any financial feasibility and/or land evaluation prepared on the basis of this analysis is subject to design, building cost, parking and regulatory requirements that have not been made a part of this analysis.

Following is a summary of demand by use:

Residential: Miami Dade County's economic and housing climate is still in recovery mode from the Great Recession, but the projected economic and demographic fundamentals in the region support long term growth in the housing market. The multifamily housing market is planning for considerable delivery of inventory driven by significant condominium development in Downtown Miami and the coastal/beach areas. However, there is also considerable activity among multifamily rental development, particularly in south Dade County. The multifamily rental market affecting the opportunity for housing development within Village of Palmetto Bay is relatively strong, with occupancy greater than 95 percent. However, the majority of inventory is older in nature, and rental rates overall are still relatively modest; particularly, in the sense of supporting a large amount of new market rate development in the near term.

As detailed within Section 2, the demand for housing for the Downtown Master Plan is based upon regional household growth projections, forecast demand for market rate multifamily housing, and the propensity for the Village's Trade Area and Downtown to capture this growth over the next ten years. It also considers existing "pent-up" demand which is largely the result of a lack of existing mid- to higher density multifamily product within the Village given regulatory, infrastructure and/or other physical challenges associated with accommodating this type housing development. Based upon historical trends and population projections, there is demand for approximately 1,200 multifamily market rate housing units in the Downtown area during the next ten year period (which we consider to represent demand under a *Trending Scenario*). However, we have also undertaken an analysis that considers that the Village of Palmetto Bay and its Downtown area may be in a position to capture well more than its fair share of demand based upon the trending analysis contemplating the Village's strong school district, a highly successful implementation of the Downtown Master Plan and continued improvement in the surrounding corridor. For this, the multifamily housing demand for the Downtown area increases to approximately 1,700 units over the next 10 years (referred to herein as the *High Scenario*). Importantly, for master planning purposes, we recommend the planners rely upon the *trending scenario*, but allow for flexibility to accommodate the higher demand. In either case, the analysis considers demand for either ownership (condominium) and/or rental product supported by primary residents (and therefore does not account for any potential additional development that may be built



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

largely for investors/speculators). In terms of housing pricing, and specific to the rental market, The base asking monthly rental rates for newer (premium) units within the market area (ie. Dadeland) is in the range of \$1.80 per square foot. We assume that this would apply to the Village; therefore, with an estimated average unit size of roughly 1,050 square feet, the average asking monthly rent would generally be in range of \$1,800 to \$1,900. For ownership (condominium), the pricing is estimated to be within the range of \$250,000 to \$350,000.

Office: Since the end of the recession in 2009, unemployment in Miami Dade County has continued to decline. Moreover, an analysis of office employment projections based upon CBRE/EA¹ and Florida Department of Economic Opportunity (FDEO) data through 2019 indicates growth in Miami Dade County's office employment of approximately 3,900 jobs per year through this period. Miami Dade County has 100 million square feet of office space, of which the Village of Palmetto Bay (and Trade Area) comprises roughly 1.0 million square feet of total inventory. The majority of office space in Palmetto Bay is Class C space, equal to 59 percent; more than double the 28 percent share of Class C space in Miami-Dade County. Approximately 78 percent of the office space in the Village of Palmetto Bay was built before 1970, and 89 percent before 1990. Since 2007, the impact of the recession pushed the office occupancy level in the Village down below 84 percent in 2012, but has since improved to nearly 88 percent in the Village as of year-end 2013. As detailed in Section 3, based upon broader office market and local submarket office development trends, and based upon projections of office employment during the next five years, office demand for the Village of Palmetto Bay is estimated to be between 135,000 and 270,000 square feet during the next 5± years. It is very important to note that this does not represent demand entirely supporting new future office development because absorption of existing space (and/or older buildings that will likely fall out of the market due to condition) needs to be considered. Nonetheless, the Downtown area is naturally in a position to capture a considerable portion of this demand since there is limited commercial land outside of the corridor to support new office development. Specific to the Downtown Master Plan, the opportunity to incorporate a limited amount of office (ie. small professional and/or medical offices) as a supporting use is warranted.

Retail: For the Village of Palmetto Bay and its broader surroundings beyond the boundaries of the Village and/or Trade Area, the retail market is well represented with local, regional and national stores ranging from quick service restaurants to Big Box tenants to regional malls. Within the Trade Area, there is approximately 600,000 square feet of retail space, with a healthy 95 percent occupancy. However, average asking rental rates within the Trade Area remain 5 to 10 percent below that of the County's average, impacted in part by a considerable amount of older, smaller neighborhood retail centers. Based upon the retail trade model (as detailed in Section 5), retail demand within Trade Area is estimated to increase 110,000± square feet by 2019, a portion of which is anticipated to be absorb by redevelopment of older retail complexes that will likely "fall out" of the market in the near term. Regardless, the Trade Area will likely capture its proportionate share. Specific to the Downtown, we estimate demand for 20,000 to

¹ CBRE/EA is an independent economic research firm owned by CBRE, and internationally recognized in the field of economic modeling and forecasting.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

30,000 square feet of retail space can be supported as part of the initial development phase including dining establishments, smaller (boutique) shops, and limited service convenience. We also believe there is an opportunity to attract a grocery store (such as Publix or Whole Foods) within the next 5± years which is based upon steady population growth for the overall trade area and the resultant demand for convenience goods during the next 5+ years that adequately supports a 40,000 to 50,00 square feet grocery store. The planning team is assuming that the Village's Downtown core has a very strong opportunity to capture this demand provided that the initial phases of the residential development are successful. Considering the opportunity for both boutique retail and grocery, there is an estimated demand for approximately 60,000 to 80,000 square feet of retail within the next 5± years. Looking further into the horizon, the Village's Downtown area should continue to capture its fair share of retail trade area demand and, therefore, over a 10± year period the total retail demand is estimated to be in the range of 100,000 to 110,000 square feet.

Based upon the analysis completed as part of the economic and market assessment for the Village of Palmetto Bay Downtown Master Plan, we provide the following conclusions and recommendations:

- *Residential and Retail will Drive Initial Downtown Program:* As summarized above, there is demand for approximately 1,200 market rate multifamily housing units within the Downtown market area during the next 10 years. Given location and strong demographic characteristics, the opportunity to incorporate 20,000 to 30,000 square feet of supporting retail within a mixed use development creates a dynamic *downtown* environment.
- *Opportunity is Manageable and Realistic:* The level of development supported herein promotes a manageable development plan that can be phased in over time and that is relatively modest in scale. Accordingly, under this framework of development, investment by the Village to encourage this opportunity is considered to be minimal given available land and existing infrastructure.
- *Downtown Program Works Best in Concentrated Area:* Levering upon the opportunity to create the Downtown based upon a manageable and realistic plan, developing Downtown in phases within concentrated areas (such as that proposed for Phase 1 immediately east of Village Hall), should mitigate substantial infrastructure investment cost by the Village, while at the same time allow for a scale of development that promotes mixed use.
- *Access to US 1 is Critical to Downtown:* Access and visibility to US 1 is critical to the success of Downtown, which is currently lacking. Accordingly, there is presently no sense of arrival or gateway characteristic approaching the Village from either the north or south along US 1. The Downtown Master Plan provides a great opportunity to establish this attribute. Furthermore, this feature helps to promote the Village with a regional presence, rather than as a small local center.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

- ***Evaluate Parking Needs:*** In the effort to support mixed use housing and retail development for the initial phase of the Downtown, it will be important to provide adequate and integrated parking for the residential buildings, with adequate and accessible parking for the ground floor retail.
- ***Downtown Potentially Generates Substantial Ad Valorem Tax:*** Based upon the incremental ad valorem tax revenue model, Lambert prepared for the Village in late 2013 (in association with previous analyses for the Downtown), the initial phases of a Downtown Master Plan that provides for up to 1,200 market rate housing units and approximately 30,000 square feet of retail space is estimated to generate more than \$600,000 in total ad valorem taxes per year to the Village (upon stabilized operations). In the case where there is estimated to be up to 1,700 market rate housing units, 100,000 square feet of retail (inclusive of grocery), and some supporting office (or 50,000± square feet), the estimated ad valorem tax revenue increases to a range of nearly \$1 million per annum (stabilized).



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

SECTION 1: STUDY AREA DEFINITIONS

As the basis for evaluating the market potential and real estate development opportunities for the Village of Palmetto Bay Downtown Master Plan, Lambert examined demographic, economic, and real estate market trends and forecasts (both residential and commercial) for four primary geographic areas: (in descending order of geographic size) Miami Dade County, south Dade County, Village of Palmetto Bay, and the Downtown Trade Area (referred to herein as the Trade Area).

Miami Dade County, and the south Dade County area, are both profiled to provide economic context for the narrower drive time radii, Downtown retail Trade Area, and the Downtown. This profiling applies to the Downtown's existing and potential "capture" of economic activity that occurs at the broader geographic levels. Importantly, the Downtown Trade Area was determined based upon a geography that represents behavioral boundaries from which prospective residents, workers and/or retail patrons' have the propensity to live, work and/or shop in a given area. In this case, Downtown Palmetto Bay will likely be supported by areas with stronger income characteristics, which is discussed in detail in Section 2 below. An illustration of the Downtown Trade Area, and outline of the Downtown Master Plan area is provided in Figure 2 at the end of this section.

The following sections provide a detailed analysis of the economic, demographic and/or real estate market conditions within the geographies noted above. Additionally, historic data, estimates, and projections for the broad range of information in this market study – demographics, income, residential and commercial real estate, among others – are available based on varying geographies. Demographic information, for instance, is most widely available for the set hierarchy of US Census geographies. Residential real estate sales data, on the other hand, is most widely available by correlating GIS boundary maps with Miami Dade County Property Appraiser (BCPA) database.

For these reasons, different sections of this study refer to multiple and/or different geographic areas (e.g., County, Village, Trade Area), based on different geographic definitions (e.g., zip code, census block group). These areas are listed below, by section of this report, and shown graphically and defined in more detail in each respective section.

- Section 2, Demographic and Economic Profile, refers to four different areas, based on political boundaries and census geographies: Miami Dade County, south Dade County, Village of Palmetto Bay, and the Trade Area, as data permits. As noted, the Trade Area for the Downtown Master Plan area represents behavioral boundaries based on the propensity for people to live, work, and/or shop in the Trade Area.



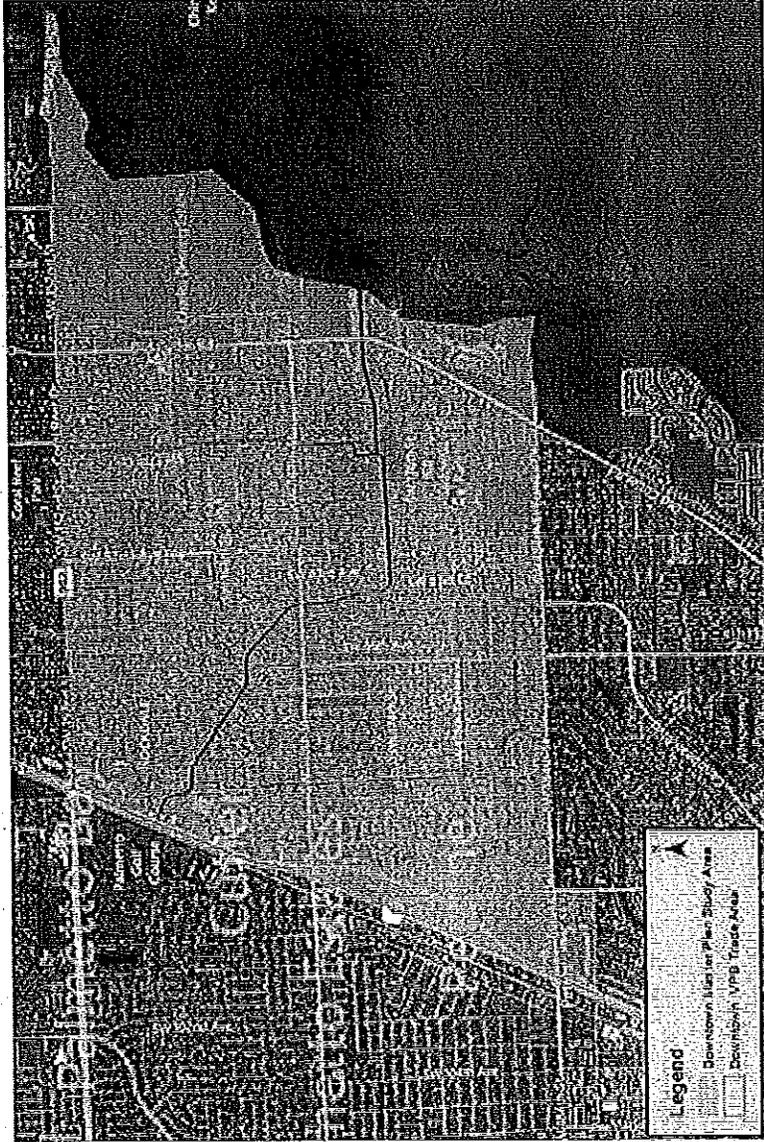
Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

- Section 3, Residential Market Analysis, analyzes key housing supply and demand trends in Miami Dade County, south Dade County and Village of Palmetto Bay. For purposes of this analysis, south Dade County is defined as the entire area south of Kendall Drive (Southwest 88th Street) to the Miami Dade/Monroe County line.
- Section 4, Office Market Analysis and Demand Estimate, considers office market trends in Miami Dade County, but focuses intently on the supply and demand activity within the Village and/or Trade Area.
- Section 5, Retail Market Analysis and Demand Estimate, represents retail supply and demand trends within Miami Dade County and the Village of Palmetto Bay, with a specific focus on the Trade Area. This area is the primary area from which Downtown Trade Area businesses will draw resident, visitor and worker expenditure. It is important to note that the Downtown Trade Area is regarded as a primary trade area for expenditure capture; however, the *Lambert Advisory Retail Trade Model* takes into account expenditures by residents outside of the Trade Area (or commonly referred to secondary and/or tertiary Trade Areas) by utilizing inflow factors – discussed in detail within in this section.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

Figure 2: Trade Area Boundary Map





SECTION 2: ECONOMIC AND DEMOGRAPHIC PROFILE

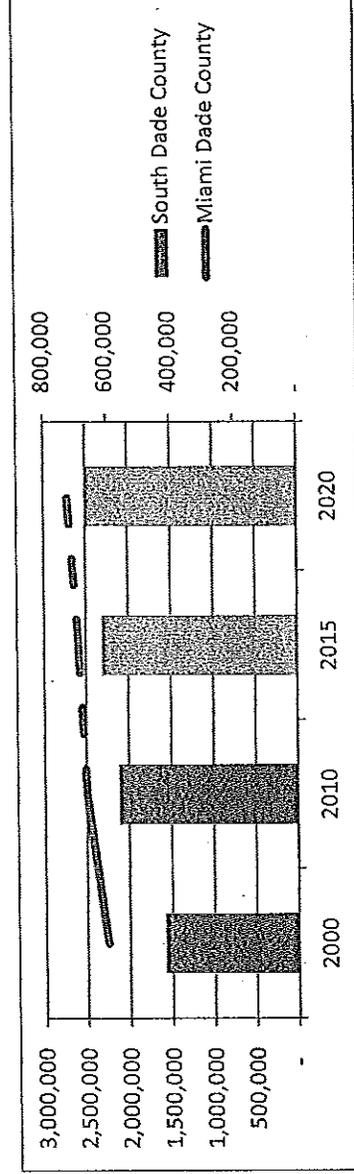
As the basis for evaluating market potential and opportunities for the Downtown area (and the Downtown Master Plan), Lambert examined population, household, and economic trends and forecasts for several geographic areas — Miami Dade County, Village of Palmetto Bay, and the Trade Area (as shown in Figure 2 above). The demographic and economic profile herein focuses on those variables that “drive” demand for residential, retail, and office uses (estimates of which are found in following sections of this report), including population and household growth trends, household income growth, and employment trends and forecasts.

2a: Population and Households Overview

Based upon 2010 US Census data, Miami Dade County grew from 1.93 million residents in 1990 to 2.25 million residents in 2000, or an average 31,600 persons per annum and 1.5 percent average annual growth rate. From 2000 to 2010 population increased to 2.49 million residents, or an average of 24,300 residents per year and 1.0 percent annual growth. According to University of Florida’s Bureau of Economic Research (BEER), the County’s growth rate is forecast to increase steadily to 2.71 million residents by 2020, or 22,100 residents per annum and 0.9 percent annual growth. South Dade County experienced stronger population growth from 2000 to 2010, at 3.0 percent per year, and is projected to increase at approximately 1.7 percent per annum for the next several years according to ESRI.²

Figure 3: Historic and Projected Population Growth – Miami Dade County

Source: BEBR



² ESRI is an international supplier of Geographic Information System (GIS) software, web GIS and geodatabase management applications.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

The Village of Palmetto Bay was incorporated in 2002. Therefore, the historical demographic information herein is based upon the correlating Census Designated Places of Cutler and East Perrine. Based upon 2010 US Census data, the Village of Palmetto Bay had a slight loss in population during the period between 2000 and 2010, declining from 24,469 residents in 2000 to 23,410 residents in 2010, or average of 105 residents per year (equal to a decline of 0.4 percent average annually). As discussed in Section 2 above, the Trade Area is slightly smaller than the Village's boundary, but demographically very similar, as summarized below.

Figure 4: Miami Dade County, South Dade County, Village of Palmetto Bay and Trade Area (Demographic Profile 2010)

Source: US Census; ACS 2008-2012

	Miami Dade County	South Miami Dade County	Village of Palmetto Bay	Trade Area
2010 Population	2,496,435	522,619	23,410	16,904
2010 Total Households	867,352	166,635	7,923	5,717
2010 Avg. HH Size	2.83	3.11	2.95	2.95
2008-12 ACS Median Household Income	\$43,464	\$49,726	\$107,259	\$98,438
2008-12 ACS Per Capita Income	\$23,304	\$22,509	\$41,034	\$39,337
2010 Owner Occupied Households %	55.80%	66.80%	84.20%	82.10%
2010 Renter Occupied Households %	44.20%	33.20%	15.80%	17.90%
2010 Median Age	38.2 years old	35.4 years old	41.9 years old	41.2 years old
Under 19	24.70%		29.20%	28.80%
20-39	28.10%		18.20%	19.30%
40-64	33.00%		40.60%	40.40%
65+	14.20%		12.00%	11.50%



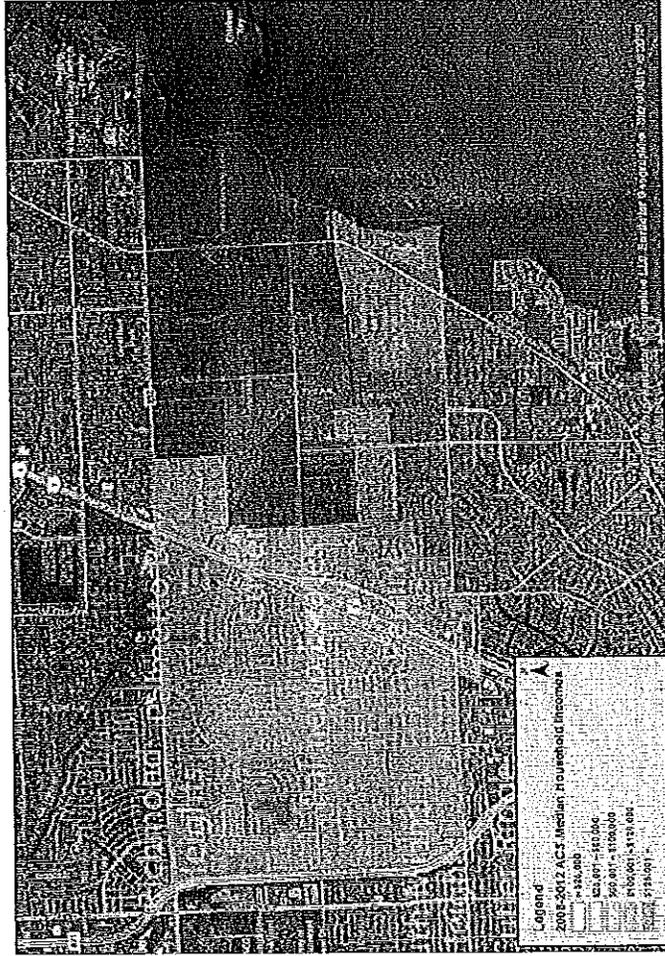
Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

As part of our demographic and economic profile, Lambert analyzed household income, which represents a critical element of retail and housing demand as it indicates the amount and nature of expenditure potential in a given market.

As detailed in the Figure above, the 2008-2012 median household income in the Trade Area (\$98,438) is very strong and significantly higher than that of the County (\$43,464) and slightly lower than that of the Village (\$107,259). This trend holds true for per capita income as well, with the Trade Area (\$39,337) having a higher per capita income than the County's (\$23,304), and slightly lower than the per capita income of the Village (\$41,034). As discussed in Section above, the determination of the Trade Area boundaries considered the income characteristics of the broader market area as shown below:

Figure 5: Median Household Incomes by Block Group, 2008-2012 ACS (Village of Palmetto Bay and Surrounding Areas)

Source: ACS





Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

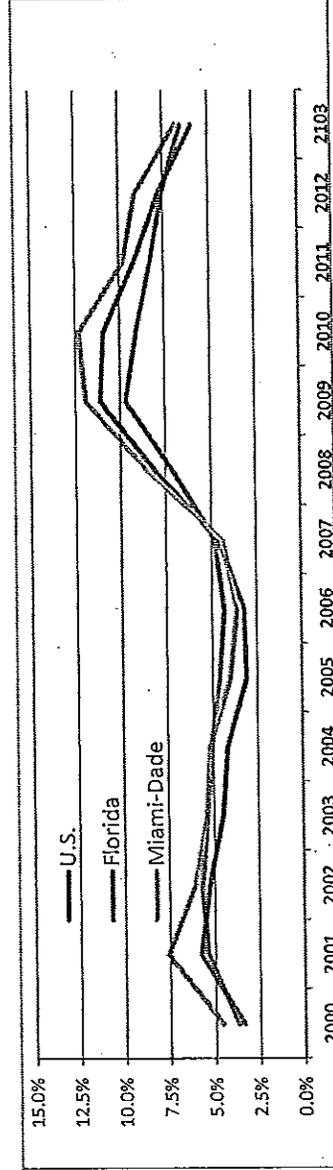
The Downtown area will primarily draw from areas to the east of US 1, with the northern boundary representing S.W. 152nd Street and S.W. 184th Street being the southern boundary.

2b: Employment and Wages

From a broad perspective, labor trends among all sectors in Miami Dade County, including employment and unemployment, have a notable impact on office demand. From 2000 to 2007, the unemployment rate in Miami-Dade County was relatively low, which was in line with trends on a State and national level. Outside of the 12 to 18 month period following the calamitous events of 9/11, the State and County unemployment rate remained below 6.0 percent and dipped to 3.3 percent in the State and 4.1 percent in Miami-Dade during 2007³. However, commencing with the economic recession in 2007/2008, the unemployment rate in the US and throughout Florida began trending upward, reaching 9.7 percent in the U.S. in 2009 and double digit levels in the State and Miami-Dade County. The State's unemployment rate peaked in 2009 at 11.1 percent, but unemployment in Miami-Dade didn't peak until June 2010, reaching 13.9 percent. Though still above pre-recession levels, unemployment in Miami-Dade has since declined steadily, with the rate dropping to 6.8 percent as of year-end 2013.

Figure 6: National, State and County Historical Unemployment Rate, January 2000-December 2013

Source: Florida Department of Economic Opportunity; BLS; Lambert Advisory



³ Florida Department of Economic Opportunity



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

According to the Florida Department of Economic Opportunity (FDEO), Miami Dade County's total non-agricultural employment base is approximately 1.07 million, of which more than 82 percent is private sector employment. Miami-Dade County's total private employment is more than 875,000. The largest private employment sectors in Miami-Dade County are Health Care and Social Assistance at 15.3 percent, Retail Trade at 15.2 percent and Accommodation and Food Services at 11.5 percent. The Professional and Business Services, Finance and Insurance, Real Estate (FIRE), and Information Services, which are primary the sectors for office based employment, collectively represent approximately 17 percent of total private employment in Miami-Dade County.

According to data from the US Census, there were a total of 5,644 persons privately employed within the Trade Area. This is an increase from 2002, were 5,336 persons were privately employed in the Trade Area. Retail trade, was the leading sector, with nearly 32 percent of all total employment in the Trade Area. The Figure below summarized private sector employment within the Trade Area between 2002 and 2011.

Figure 7: Trade Area Private Sector Employment

Source: US Census On The Map

NAICS Sector	Count By Year			Actual Change		Percent Change	
	2002	2007	2011	02-07	02-11	02-07	02-11
Retail Trade	1,701	2,239	1,804	538	103	31.6%	6.1%
Health Care & Social Assistance	565	302	666	-263	101	-46.5%	17.9%
Administration & Support, Waste Management and Remediation	398	549	649	151	251	37.9%	63.1%
Finance, Insurance & Real Estate (FIRE)	215	351	494	136	279	63.3%	129.8%
Accommodation & Food Services	446	434	481	-12	35	-2.7%	7.8%
Professional, Scientific and Tech Services	288	363	408	75	120	26.0%	41.7%
Wholesale Trade	235	202	208	-33	-27	-14.0%	-11.5%
All Other Sectors	1,488	958	934	-530	-554	-35.6%	-37.2%
Totals:	5,336	5,498	5,644	62	308	1.2%	5.8%



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

As noted in the table above, the employment sectors that experienced the strongest growth in the Trade Area between 2002 and 2011 were FIRE, Administration & Support, Waste Management & Remediation, along with Professional, Scientific and Technical Services. These sectors are primarily office using jobs and will drive office demand locally and regionally.

In regards to office employment, Miami-Dade County is projected to increase office employment by 3,867 employees on average annually through 2019, or 1.9 percent per year. The following table is a summary of historic and projected office employment in Miami-Dade County.

Figure 8: Miami-Dade County Office Employment Projections

Source: Florida Agency for Workforce Innovation

	Financial	Services	Total	Avg. Annual Change	Avg. Annual Growth %
1990	63,600	76,400	140,000		
2000	60,800	134,400	195,200	5,520	3.4%
2010	60,400	119,200	176,600	-1,860	-1.0%
2013	67,800	125,800	193,600	5,667	3.1%
2019	72,700	144,100	216,800	3,867	1.9%

The office employment growth above will be the key indices for office demand projections provided in Section 5 below.

2c: Economic and Demographic Profile Conclusions

As noted above, the economic and demographic trends of the region are key determinants to possible development opportunities both in the near term and the long term. It is not only important to analyze economic and demographic trends in order to comprehend current market conditions, but also to adequately support a strategy for Downtown going forward. A summary of key economic/demographic characteristics within the local and regional market that will affect opportunities for the and Downtown Master Plan include:



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

- Population has shown a slight decline in the Village and Trade Area during 2000-2010, compared to modest growth for south Dade and Miami Dade County. Importantly, south Dade County is expected to grow at a faster pace than that of the County for the next few years, which is a key growth indicator for the Downtown Master Plan housing and retail demand.
- The Village and Trade Area have substantially higher per capita and household income compared to the County (and south Dade County), which is a key component to supporting housing and commercial development.
- Employment growth is expected to rebound during the next several years and provide solid demand for on-going office development throughout the broader region.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

SECTION 3: RESIDENTIAL MARKET ANALYSIS

The opportunity for housing is considered to be strong for the Downtown area. In terms of rental housing opportunity, Lambert completed a broad overview of the local and regional rental housing market.

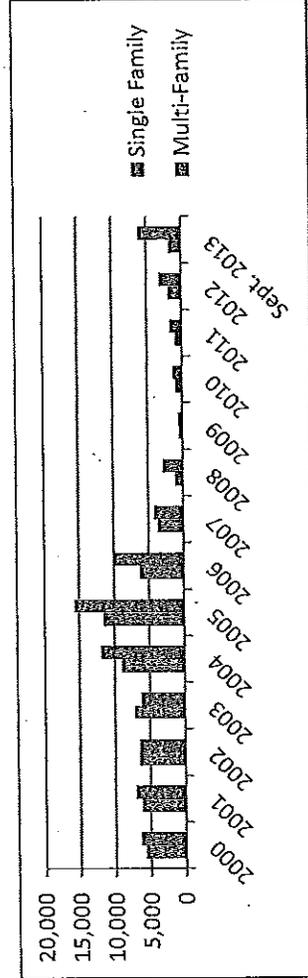
The following provides a profile of residential housing conditions supporting the opportunity for housing as part of the Downtown Master Plan. While we focus on overall trends in the housing market to identify general market conditions, the focus herein is multifamily housing, since it is the product type that defines mid- to higher density development in the Downtown.

3a: Housing Market Overview

According to Reinhold P. Wolff Economic Research (RPW), the growth in both single family and multifamily housing permit activity in Miami Dade County was among the strongest in the region's history, with total housing permits increasing from 12,200 in 2000 to 27,200 by 2005; or an average annual increase of nearly 15 percent per annum. Multifamily housing permits had the strongest growth trajectory from 2002 to 2005, as the Downtown Miami market and coastal areas skyrocketed with speculative development. According to RPW, housing starts are expected to remain robust during the next few years, based upon projects currently under construction or in the planning stages. In particular, multifamily development County-wide is expected to reach 14,000 units in 2014, with single family development expected to remain stable at 4,000 units.

Figure 9: Miami Dade County Residential Building Permit Activity

Source: RPW; Lambert Advisory





Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

Based upon data provided by RPW, the median price for new single family homes in Miami Dade County as of the 3rd Quarter 2013 was \$260,000, while existing home values were approximately \$206,000; or, an estimated \$225,000± combined. However, based upon an analysis of single family home sales in the Village of Palmetto Bay, there were 93 total sales from January 2012 to March 2013, with an average home sale price of \$472,480; or, more than twice the average price for that of the County.

In terms of condominium sales, the Miami Dade County peaked with 25,400 sales in 2005, steadily declining to less than 1,330 by 2012. Although there is projected to be roughly 1,000± condominium sales in 2013, the pace of condominium sales is expected to escalate dramatically as new development is completed during the next 12 to 24 months (and likely beyond).

New condominium sales prices are rapidly increasing with the average price reaching nearly \$500,000 in the third quarter 2013, compared to less than \$375,000 per sale during the same period in 2012 which is largely the impact of sales Downtown, and along the eastern/coastal fringes of the County. In contrast, condominium re-sales are currently just below \$200,000, with several areas in the south Dade County area registering re-sales well below this level.

In terms of rental housing, the market profile is based upon rental housing market industry resources such as Apartment Guide, Reinhold P. Wolff (RPW) MyRents.com, with additional support from our discussion with select rental housing developments within the surrounding market area. The County's rental housing market overall is nearly 97 percent occupied, with the broader Perrine/Cutler Bay submarket (within which encompasses the subject's Trade Area as defined by RPW) is slightly lower but still a solid 95.5 percent occupancy. Rental rates County-wide are averaging \$1,413 per month (or \$1.60 per square foot) as of the third quarter 2013, an improvement of 3.5 percent over the prior year. For the Perrine/Cutler Bay submarket, rental rates are estimated to be slightly lower than the County overall, though generally comparable.

There are approximately 5,850 rental apartment units within five miles of the Trade Area. These include projects with 80 units or more. The inventory is dated, with 83 percent (4,820 units) delivered prior to 1980. Only eight percent (485 units) have been delivered since the year 2000.

As part of the analysis of the rental housing market for the Village of Palmetto Bay, Lambert conducted a survey of select significant rental apartment communities in and around the Village of Palmetto Bay. In the latter case, due to the lack of new vintage Class A or B market rate rental apartments in the Village (or Trade Area), the sample survey extended out to include apartment communities located within five miles of the Trade Area. Ten projects were included in the survey combining for 2,487 multi-family rental apartment units. Of this total, two apartment communities combining for 388 units are located in the Village of Palmetto Bay; four projects, combining for



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

1,187 units are located in the Dadeland/Kendall market to the north of the Village; and four projects, combining for 912 units, are located in the Cutler Ridge area south of the Village. The findings from our research, including the sample survey of apartment communities, are presented in the following discussion along with a detailed Table in the Appendix.

Occupancy rates are high among all projects, averaging 94.6 percent and ranging from 100 percent for one of the two projects in the Village, to 93.8 percent for the four apartment communities located south of the Village. Rents are roughly 50 percent higher among projects north of Palmetto Bay, averaging \$1,254 (\$1.43/sq. ft.), compared to an average of \$853 (\$1.04/sq. ft.) among projects south of Palmetto Bay. The average rental rate for the two projects surveyed in the Trade Area were at the lower end of the survey range, averaging \$725 and \$0.94 per square foot - noting, though, that these properties are more than 40 years old.

3b: Residential Demand Analysis

In the effort to identify the level of demand for residential development expected to occur during the next few years within the broader market area, the Trade Area and the Downtown specifically, we consider the economic, demographic, and overall housing market and economic conditions as outlined in this section as well as in preceding sections. The demand analysis methodology herein is used to identify the broader parameters of residential demand that support potential housing demand within the Trade Area and the Downtown area, and has been prepared in the effort to provide order of magnitude estimates of future housing demand. Accordingly, the focus of the analysis is to determine level of demand for market rate housing, as discussed further below.

The methodology for evaluating demand considers historical population trends and projections for the Village and Miami Dade County. However, household growth activity in south Dade County is a very important part of this analysis considering it is the broader market from which the Village and Downtown will draw demand; particularly upper income households.

The detailed housing demand analysis (model) is included in the Appendix, with a summary of the key assumptions provided as follows:

Household Growth: In 2010, there were 166,365 households in south Dade County and based upon projection data from ESRI⁴ the area's household growth is projected to grow at 1.7 percent per annum for the next five to ten year period.

Household Income: Based upon US Census data, approximately 50 percent of all households in south Dade County have annual household income greater than \$50,000, a minimum threshold considered to adequately support monthly rental payments required



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

to underwrite new, market rate multi-family housing development; or, minimum average monthly rental rates estimated to be \$1,400 to \$1,600.

Multi-family Units: The housing demand for the Downtown area considers propensity of demand for mid- to higher density multi-family housing that provides the critical mass needed to encourage a dynamic, mixed use area. Based upon US Census housing data for Miami Dade County, roughly 40 percent of all dwelling units are multifamily. Importantly, for this analysis, we assume that the proportion of multifamily development will continue to outpace single family development given current and near term trends and therefore we apply a modest increase to the model.

Capture of New Housing Demand: Based upon the demographic composition of the region, Village of Palmetto Bay represents approximately 4.7 percent of the total households in south Dade County; however, it represents more than 7.5 percent of the households over \$50,000. Therefore, for this analysis we assume that the Village will continue to capture its fair share of this household demand, which is considered to be a somewhat conservative estimate considering the Village residents have access to some of the highest performing elementary, middle and high schools in the south Dade County region.

Based upon the assumptions above, and detailed in the housing demand model in the Appendix, there is estimated to be approximately 10,500 new multifamily housing units with household incomes greater than \$50,000 demanded within south Dade County during the next 10 years from population growth alone. Accordingly, it is presumed the Village (and specifically the Downtown area) will continue to capture its fair share of growing demand, or 840 total multifamily (market rate) housing units demand from 2014 to 2023.

However, in addition to the demand from new household growth in the region, we strongly believe there is current pent-up demand for multifamily housing in the Village of Palmetto Bay. This pent-up demand essentially represents demand from the existing population base that would choose to live in Village of Palmetto Bay should mid- to higher density multi-family product exist, but does not due to any land constraints, infrastructure challenges, and/or regulatory controls that if mitigated by the Village would allow for such development. At this stage of the process, it is difficult to clearly understand or evaluate pent-up demand. Nonetheless, we consider that a select group of tenants within several rental communities in the broader area (as identified above) would have a very high propensity to locate within a new development in the Village of Palmetto Bay; particularly, within a well-planned Downtown environment. For this analysis, we assume that at least 1,000 units (households) that currently exist in the broader market area would represent the universe of pent up demand from which the Downtown may capture over the next ten years. If we assume that the average tenant “roll-over”⁵ within an apartment complex is 60 percent on an annual basis, and the Village is capable of capturing only 5

⁵ Roll-over is generally defined as expiring leases for which tenants are not likely to renew at the current location.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

percent of those tenants, then there is additional “pent-up” demand of approximately 330 multi-family units in total over a 10 year period.

The analysis above is primarily based upon population and housing growth that is generally tied to historical trends and projections from census and County provided data. As such, we refer to this as a *Trending Scenario*. However, we have also undertaken an analysis that considers that the Village of Palmetto Bay and its Downtown area may be in a position to capture well more than its fair share of demand based upon the trending analysis contemplating the Village’s strong school district, a highly successful implementation of the Downtown Master Plan and continued improvement in the surrounding corridor. For this, we increase the Villages capture of south Dade County households from 8 percent to 9 percent (more than a 10 percent increase) and increasing capture of “pent up” demand from existing apartments from 5 percent to 7.5 percent, the multifamily housing demand for Downtown area increases to approximately 1,700 units over the next 10 years (referred to herein as the *High Scenario*). Importantly, for master planning purposes, we recommend the planners rely upon the trending scenario, but allow for flexibility to accommodate the higher demand.

Figure 10: Summary of Multifamily (Market Rate) Housing Demand – Downtown Village of Palmetto Bay (2014 to 2023)

Source: US Census; ESRI; Lambert Advisory

Source	Demand (Units)	
	Trending Scenario	High Scenario
Demand from New Households	840	1,206
Plus: Existing Pent-up Demand	330	495
Total Estimated Multifamily Housing Units (Market Rate)	1,170	1,701

It is also important to note that in the determination of prospective housing demand for the Village and its Downtown, we do not make a distinction between homeownership (condominium) and rental product. This is due to the likelihood that multi-family demand in this particular location will represent a mix of owners and renters. This is based upon multifamily development trends in South Florida during the past 15± years. Prior to the housing boom of in the early 2000’s, multifamily family housing development represented a mix of traditional rental complexes and condominium properties. The condominium properties were primarily occupied by primary residents, with a relatively modest representation of second homers and investors who purchased with the intent to rent their units. However, speculation in the condominium development sector prevailed since 2000, and the proportion of investor-purchased units dominated and created a significant “shadow” rental market; particularly in the Downtown Miami market, but also in suburban markets such as Downtown Dadeland and Kendall. Today, this trend continues fueled in large part by financing environment and preponderance of foreign investment in Miami Dade County. Therefore, it is highly possible that housing development in Downtown Palmetto Bay (or at least a portion thereof) may be built as condominium, but the mix of occupants will be primary residents, or investors renting their units



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

to primary households/renters. Regardless, the demand for multifamily housing whether ownership or rental outlined herein is based upon the demand from primary residents (occupants).



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

SECTION 4: OFFICE MARKET DEMAND ANALYSIS AND DEMAND ESTIMATE

4a: Office Market Overview

According to CoStar⁶, as of the 4th Quarter of 2013, there are 4,315 office buildings in Miami-Dade County combining for 100 million square feet of office space. The vacancy rate is at 12.2 percent and the average quoted full service rent is at \$29.05 per square foot.

The Village Palmetto Bay has an office inventory of 989,757 square feet in 73 buildings, equal to one percent of the County total. Of the total office space in Palmetto Bay, 835,470 square feet, equal to 84 percent, is situated in the Trade Area. Vacancy rates in Palmetto Bay and the Trade Area are higher than the County as a whole; and average quoted full service rents are lower than the county. The average size office building in Palmetto Bay is 13,500± square feet, compared to 23,000± for Miami-Dade County.

Figure 11: Miami-Dade County, Village of Palmetto Bay and Trade Area - Office Market Snapshot (4Q 2013)

Source: CoStar

Market Area	Number of Buildings	Avg. Size Bldg Sq. Ft.	Total Inventory Sq. Ft.	Vacancy Rate	Quoted FS Rent Sq. Ft.
Miami-Dade County	4,315	23,062	99,510,900	12.20percent	\$29.05
Village of Palmetto Bay	73	13,556	989,757	16.10percent	\$25.75
Trade Area	63	13,261	835,470	12.90percent	\$24.75

Approximately 27 percent of the office space in Miami-Dade is classified as Class A, compared to five percent for the Village of Palmetto Bay. This five percent share in the Village represents 48,700 square feet of Class A office. The majority of office space in Palmetto Bay is Class C space, equal to 59 percent; more than double the 28 percent share of Class C space in Miami-Dade County.

Approximately 78 percent of the office space in the Village of Palmetto Bay was built before 1970, and 89 percent before 1990. Since 2003, seven new buildings, combining for 113,772 square feet of office space has been delivered to Palmetto Bay.

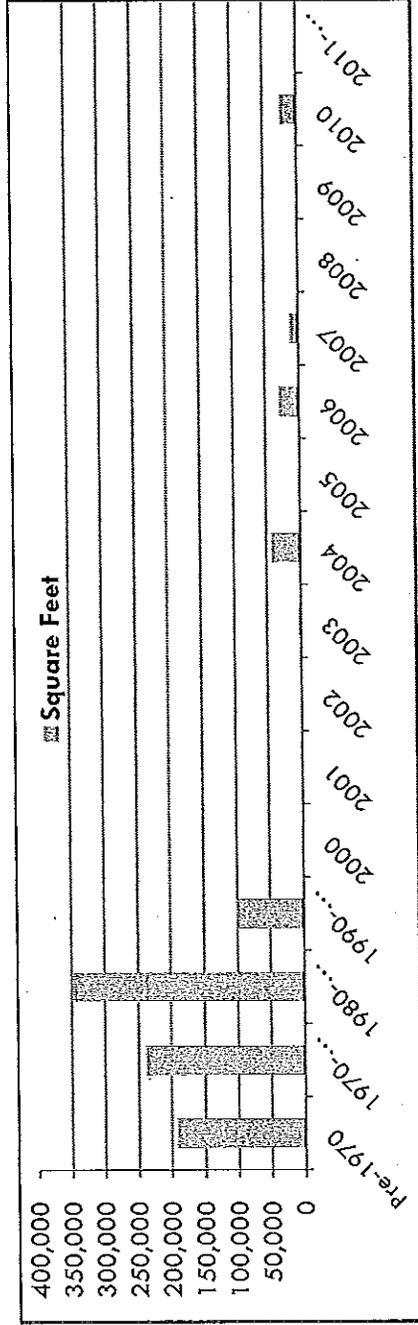
⁶ CoStar is an internationally recognized as an industry leading real estate data service provider.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

Figure 12: Age of Office Inventory - Village of Palmetto Bay

Source: Costar



The office occupancy rate for Miami-Dade peaked at 93.4 percent in 2005, before over supply, coupled with the impact of the recession contributed to declining occupancy levels every year over the next five years to 85.5 percent in 2010. Office occupancy in Miami-Dade began improving in 2011, with a slow steady climb to 87.7 percent as of the 4th Quarter 2013; and corresponding with the slow but steady improvements in the local economy.

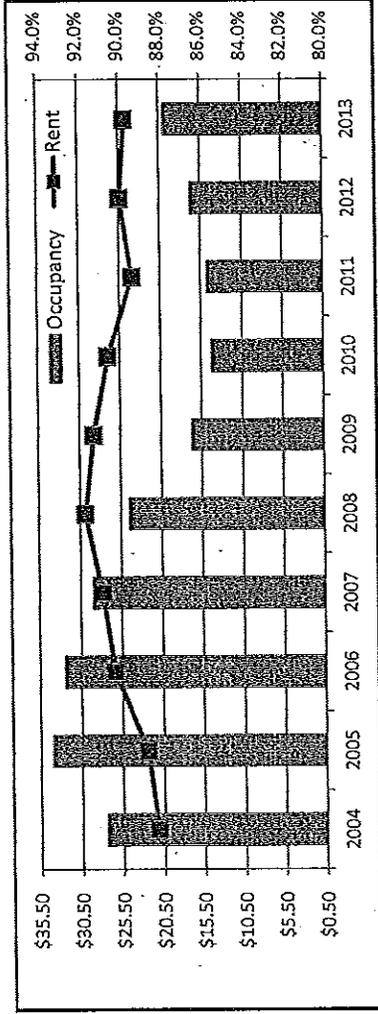
Prior to the recession, office occupancy in the Village of Palmetto Bay (and Trade Area) improved significantly from 2004 to 2007, climbing from a paltry low of 63.8 percent and 63.6, respectively in 2004, to a peak of 93 percent in 2007. This was the result of the new office buildings delivered to the market during this time and an indication of pent-up demand for new office in the Village. Since 2007, the impact of the recessions pushed the office occupancy level in the Village down below 84 percent in 2012, but still significantly better than the occupancy rate in 2004. Office occupancy trended up in 2013 to 87.6 percent in the Village and 86.9 percent in the Trade Area as of year-end 2013.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

Figure 13: Village of Trade Area - Office Occupancy and Quoted Rental Rate Trends- 2004-2013

Source: Costar



The average quoted full service rent for office in Miami-Dade County climbed from \$24.11 per square foot in 2004, to \$32.32 in 2008, peaking in that year. This equated to a staggering average annual increase of 7.6 percent. The impact of the recession contributed to rents for office space declining by 11.2 percent (2.9 percent annual average), from \$32.34 in 2008 to \$28.71 in 2012. The average quoted full service rent increased by a 1.2 percent in 2013, a modest increase, but a positive sign for landlords.

The Village of Palmetto Bay, including the Trade Area experienced comparable increases in quoted full service rent for office between 2004 and 2008, growing by an annual average of 9.0 percent over the four year period. Rents peaked at \$29.26 per square foot in the Village and \$29.85 per square foot in the Trade Area in 2008. From 2008 to 2011, rents in the Village declined by 16.8 percent (4.5 percent annual average) to \$24.92 per square foot; and by 19.9 percent (5.4 percent annual average) to \$23.90 in the Trade Area. Since 2011 rent growth in both the Village and the Trade Area has been uneven, increasing by 4.5 percent to \$26.05 per square foot in 2012, before declining by 1.2 percent to \$25.75 per square foot in 2013 in the Village; and increasing by 6.2 percent to \$25.38 per square foot in 2012, before declining by 2.5 percent to \$24.75 in the Trade Area in 2013.

The analysis of net absorption is a very important component of any office demand analysis, as it is the key barometer for understanding timing associated with new development. At the outset, we believe it's important to gain insight into long term absorption trends, narrowing into more recent activity.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

The Village of Palmetto Bay absorbed 325,794, square feet of office space from 2004 to 2007. Of this total, approximately 97 percent, equal to 315,216 square feet, was absorbed in the Trade Area. The peak year for absorption over the four years was 2005, with 125,297 square feet absorbed in the Village and 119,297 absorbed in the Trade Area in that year. From 2007 to 2012, absorption in both the Village and the Trade Area has been uneven, with both areas experiencing a negative net absorption of 57,126 and 45,367 square feet, respectively, over the five-year period. However, absorption trended up in 2013, including 33,019 net square feet absorbed in the Village and 28,019 net square feet absorbed in the Trade Area for the year.

The Figure below presents an analysis of annual net office absorption in the Village of Palmetto Bay and the Trade Area as a share of net office absorption in Miami-Dade County from 2004 to 2013. The analysis shows that the Village of Palmetto Bay's share of net office absorption in Miami-Dade County ranged from 2.1 to 10.4 percent, and averaged 2.9 percent over the ten-year period. The share of net absorption of office in the PB Trade Area ranged from 2.0 to 50 percent, with the latter occurring in 2008 and representing somewhat of an anomaly. The next highest share in the Trade Area was 10.3 percent in 2006, comparable to the 10.4 percent share for the Village in that year.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

Figure 14: Annual Net Office Square Feet Net Absorption, Market Share (2004-2013) - Village of Palmetto Bay & Trade Area
 Source: Costar

Year	Miami-Dade Net Sq. Ft. Absorbed	Village of PB Net Sq. Ft. Absorbed	Share of Miami-Dade	PB-Primary Trade Area Net Sq. Ft. Absorbed	Share of Miami-Dade
2004	2,528,860	54,051	2.1%	60,296	2.4%
2005	3,190,230	25,297	3.9%	119,297	3.7%
2006	830,283	86,474	10.4%	85,274	10.3%
2007	1,210,900	59,972	5.0%	50,354	4.2
2008	16,259	(8,541)	-	8,177	50.3%
2009	(1,397,274)	(28,235)	-	(32,335)	-
2010	717,337	25,355	3.5%	24,805	3.5%
2011	1,043,220	(12,576)	-	(14,525)	-
2012	1,001,230	(33,129)	-	(31,489)	-
2013	1,430,175	33,019	2.3%	28,489	2.0%
Total	10,571,163	301,687	2.9%	297,508	2.8%
10 Year Anni.Avg	1,057,116	30,1693	2.9%	297,500	2.8%
2004-2007 Pre-Recession	7,760,223	325,794	4.2%	315,221	4.1%
2010-2013 Post Recession	4,191,962	12,669	0.3%	6,810	0.2%
Avg 2004-2005	2,859,545	89,674	3.1%	89,800	3.1%
Avg. 2004-2007	1,940,055	81,450	4.2%	78,800	4.1%
Avg. 2010-2013	1,047,990	3,167	0.3%	1,700	0.2%

As part of this analysis, we completed a detailed profile of 12 of the largest office buildings (greater than 20,000 square feet) in the Trade Area. The 12 buildings combine for 540,058 square feet, equal to approximately 65 percent of the total inventory of office space in the Trade Area and approximately 55 percent of the inventory of office space in the Village. The average rentable area among the 12 office buildings is 45,000 square feet and ranges from 23,639 square feet at the Total Bank Building, to 190,719 square feet at the Palmetto Bay Village Center. The average asking FS rent among the 12 significant buildings is \$26.00 per square foot. Operating expense generally range between \$7.00 and \$10.00/sq. ft.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

4b: Office Demand Analysis

To get a basic understanding of future office market demand that will drive the need for new office development throughout the County and the Downtown area, the analysis commences with projected office employment growth. As previously noted, office demand related employment in Miami Dade County is estimated to increase by roughly 3,900 per year over the next few years (or an estimated 23,500 jobs from 2014 to 2019). According to the Building Managers and Owners Association (BOMA), among other industry benchmark indicators, the office space per employee ratio in Miami Dade County is in the range of 230 square feet. Based upon low and high growth estimates ranging from 18,000 to 22,000 new office jobs, and then multiplying this range by 230 square feet per employee, results in net demand for new office space in Miami Dade County is estimated to range between 4.1 and 5.1 million square feet over the next five years. Based upon historical and more recent capture trends, the Village of Palmetto Bay is estimated to capture 3 to 5 percent of the County's total inventory, and assuming this capture rate going forward, the Village's office market is forecast to have demand for roughly 135,000 to 270,000 square feet during the next 5± years.

Figure 15: Village of Palmetto Bay Office Demand – 2014 to 2019

Source: Lambert Advisory

	LOW	HIGH
Estimated County Office Job Growth (2014 to 2019)	18,000	22,000
Sq.Ft. Office Net Demand @ 230 sf per employee	4,100,000	5,100,000
percent Village of Palmetto Bay Capture	3 percent	5 percent
Village of Palmetto Bay Total Potential - Office Demand (Sq.Ft.)	135,000	270,000

The office demand indicated above represents demand for the entire Village of Palmetto Bay, from which demand in the Downtown area will be driven, including the Downtown area. Accordingly, this figure is net new space demanded and it assumes that at least some portion of this space is absorbed within existing vacant space and/or older, development well beyond its useful life. Nonetheless, the most relevant point to the analysis herein indicates office demand exists for the Downtown area that can be considered a strong supporting use for mixed use development, either in the initial development phases, and/or subsequent phases.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

SECTION 5: RETAIL MARKET ANALYSIS AND DEMAND ESTIMATE

5a: Retail Market Overview

The focus of the retail analysis herein is to review and summarize retail market trends in the Village of Palmetto Bay and the Trade Area, with a comparison to that of the broader region. For the Village of Palmetto Bay and its broader surroundings beyond the boundaries of the Village and/or Trade Area, the retail market is well represented with local, regional and national stores ranging from quick service restaurants (ie. fast food) to Big Box tenants (such as Target, Best Buy and Marshalls) to regional malls. Specific to the Downtown area, we do not anticipate large scale retail development (and namely large discount stores) to occur during the foreseeable future considering site constraints and the fact that it is not complimentary to the Downtown envisioned for Palmetto Bay (at least during initial phases). Considering this, we do believe the Downtown will be served by complimentary uses which will be smaller in scale (and discussed further below), with potential for any large scale retail in the Corridor planned for long term development. Regardless, we have analyzed the retail market and prepared estimates of demand.

According to CoStar⁷, as of the 4th Quarter of 2013, there are 9,757 retail buildings in Miami-Dade County combining for 122 million square feet of retail space. The vacancy rate is at a very healthy 4.0 percent and the average quoted full service rent is at \$27.85 per square foot.

The Village of Palmetto Bay has a retail inventory of 787,200 square feet in 75 buildings, equal to less than one percent (0.6 percent) of the County total. Of the total retail space in the Village, 570,300 square feet (68 percent) is situated in the Trade Area. Vacancy rates in the Village and Trade Area are slightly higher than the county as a whole at 4.1 and 4.9 percent, respectively. The average quoted full service rents are lower than the County at \$25.54 and \$22.40 per square foot, respectively. The average size retail building in both the Village and Trade Area is roughly 10,000 square feet. By comparison, the average size retail building in Miami-Dade is estimated at 12,519 square feet.

⁷ CoStar is an internationally recognized as an industry leading real estate data service provider.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

Figure 16: Miami-Dade County & Village of Palmetto Bay and Trade Area - Retail Market Snapshot (4Q 2013)

Source: Costar

MARKET AREA	Number of Buildings	Ave. Size (Sq. Ft.)	Total Inventory (Sq. Ft.)	Vacant Retail (Sq. Ft.)	Vacant Rate (%)	Quoted RS Rent (\$/Sq. Ft.)
Miami-Dade County	9,757	12,519	122,152,110	4,900,000	4.0%	\$27.85
Village of Palmetto Bay	75	10,496	787,200	32,500	4.1%	\$25.54
Primary Trade Area	58	9,832	570,250	28,000	4.9%	\$22.40

As with most metropolitan markets in Florida, the economic downturn in real estate markets has significantly impacted the retail sector in Miami-Dade County. Starting in 2007, declining retail sales brought on by high unemployment and shaken consumer confidence, combined with tight credit markets and a “wait and see” strategy among retailers with regard to expansion plans, contributed to a fragile real estate market for retail. In general, occupancy levels declined as did rental rates, and tenant prospects diminished.

The Figure below presents occupancy rate trends for Miami-Dade County, the Village of Palmetto Bay and Trade Area from 2006 to 2013. The analysis shows that the occupancy rate for retail space in Miami-Dade and the Trade Area peaked in 2007 at 97.1 and 98.8 percent, respectively. Starting in 2008, the occupancy rate for retail space in both Miami-Dade and the Village declined slightly, reaching 95 percent in Miami-Dade County in 2009 and 89.4 percent in the Trade Area in 2010. Since 2009, the occupancy level for retail space in Miami-Dade has slowly increased to reach 96 percent as of the 4th Quarter 2013. The occupancy rate for retail space in the Trade Area also registered 96 percent, with a sharper increase from its low point in 2010.

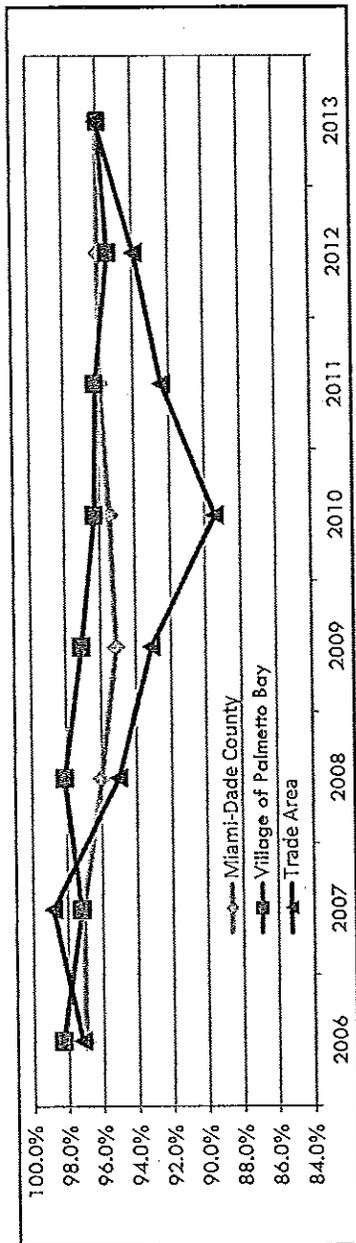
The occupancy rate for retail space in the Village of Palmetto Bay as a whole peaked at 98.3 percent in 2006, declined to 97.2 percent in 2007 then popped back up to 98.1 percent in 2008. Starting in 2009, the occupancy rate for retail in the Village declined at a much smaller pace than the Trade Area, reaching a low point of 95.4 percent in 2012, inching up to 95.9 percent in 2013.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

Figure 17: Retail Occupancy Trends- 2004-2013 - Miami-Dade County, Village of Palmetto Bay & Trade Area

Source: Costar



The average rental rate for retail space from 2006 to 2013 in Miami-Dade County, the Village of Palmetto Bay and the Trade Area, generally trended in response to occupancy rate. Thus, after peaking at \$27.69 per square foot in 2007, the average rental rate for retail space in Miami-Dade declined by 15.2 percent (5.3 percent annual average) from 2007 to 2010. Rental rates for retail space in Miami-Dade bounced back growing 21.6 percent (10.3 percent annual average) to \$28.57 per square foot in 2012. However, the average rental rate for retail in Miami-Dade declined again in 2013, to \$27.85 per square foot.

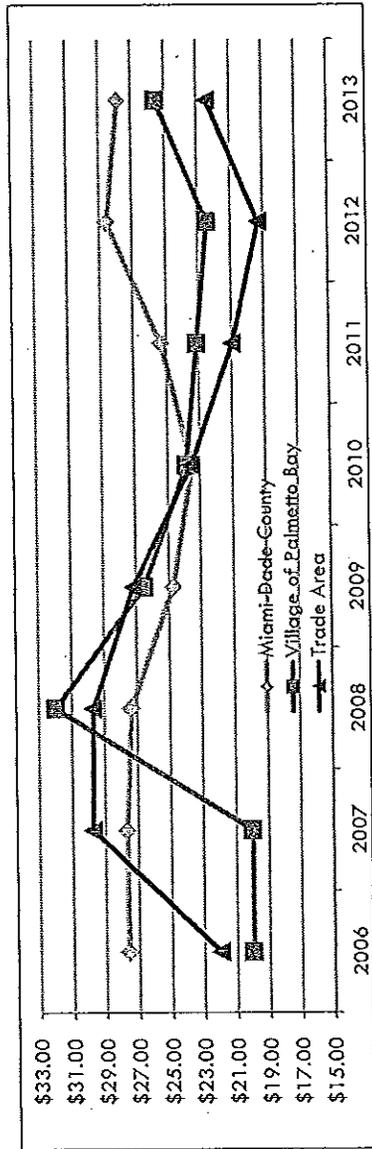
The average rentals rates for retail space in the Village and the Trade Area peaked at \$31.99 and \$29.70 in 2008, both higher than that for Miami-Dade County in that year. From 2008 to 2012, the average retail rental rate declined precipitously in both the Village and the Trade Area. Accordingly, the average retail rental rate in the Village declined by 30 percent (8.5 percent annual average) to \$22.44 per square foot in 2012; declining by 35 percent (10 percent annual average) to \$19.29 per square foot in 2013. The average rental rate for retail in the Village jumped back up by 13 percent to \$25.54 per square foot in 2013 and by 15.1percent to \$22.40 per square foot in the Trade Area.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

Figure 18: Retail Quoted Rental Rates- 2004-2013 - Miami-Dade County, Village of Palmetto Bay & Trade Area

Source: Costar



The Figure below presents an analysis of annual net retail absorption in the Village of Palmetto Bay and the Trade Area as a share of net retail absorption in Miami-Dade County from 2006 to 2013. The analysis shows that the Village of Palmetto Bay's share of net retail absorption in Miami-Dade County ranged from 0.3 to 2.4 percent and averaged 0.1 percent over the seven-year period. The share of net absorption of retail in the Trade Area ranged from 0.7 to 1.4 percent and averaged 0.3 percent from 2006 to 2013.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

Figure 19: Annual Net Retail Square Feet Absorption and Market Share-2004-2013 - Village of Palmetto Bay & Trade Area

Source: Costar

Year	Miami-Dade Net Sq. Ft. Absorbed	Village of Palmetto Bay Net Sq. Ft. Absorbed	Share of Miami-Dade	Share of Miami-Dade
2006	1,500,000	17,500	1.20%	0.00%
2007	3,557,630	9,800	-	0.70%
2008	1,460,700	35,460	2.40%	-
2009	906,000	19,275	-	-
2010	583,400	7,700	-	1.40%
2011	1,191,800	4,270	0.30%	1.40%
2012	604,200	17,200	-	0.80%
2013	552,600	9,865	1.80%	0.30%
Total	10,356,300	19,100	0.10%	0.30%
8-Year Annl.Avg	1,294,500	2,390	0.10%	-

6B: Retail Demand Analysis

As discussed in Section 1, Lambert has defined its primary retail Trade Area based upon boundaries for the Corridor and Downtown which is considered to represent the area from which we believe Downtown businesses will draw patrons for food and beverage establishments, local stores and boutiques, and specialty businesses on a regular basis. We clearly recognize that the Trade Area described herein is not the only area from which the Downtown area and Downtown retailers will draw patrons. The *Lambert Advisory Retail Trade Model* takes into account expenditures by residents outside the retail Trade Area by utilizing inflow factors, as described in detail below. We have estimated demand for the current year and for 2019.

Local residents' expenditures are the primary potential driver of demand for retailers within the Downtown's Trade Area. Although utilizing large amounts of data from a variety of sources, the way the retail trade model derives the estimated space demand is actually quite simple. The methodology is described in detail below.

- **Total Personal Income** – In 2014, there are nearly 17,250 residents in the Trade Area with per capita income of approximately \$43,420 (distinct from average household income), which yields \$172 million in total personal income.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

- **Total Non-Auto Retail Expenditure** – An estimate of non-automobile retail expenditure for the Trade Area is made by multiplying the Total Personal Income by the percent of income that is spent on non-auto retail purchases in a given year. The percent of household income spent on non-auto retail purchases was derived from the Department of Commerce 2009-2010 Consumer Expenditure Survey (Southern Region), which is both region- and income cohort-specific based upon data from the Department of Commerce, and residents are estimated to spend nearly 23 percent of their income on non-auto related retail goods.
- **Expenditure by Store Type** – Non-auto expenditure by store type for the market area is estimated using the percentage of total non-auto store sales by store type for the State of Florida (as a proportion of total non-auto sales) based on an analysis of the 2007 Census of Retail Trade. County level data is available to some degree but many retail categories are not separable due to the fact that the Census Bureau maintains limits on how much data is provided at the county level for categories where there are only a few competitors.
- **Primary Market Area Retention** – This is estimated based upon fieldwork and experience, and is an estimate of the degree of leakage which may occur from the Downtown by store type. Most merchandise categories have relatively low retention rates due to the size of the Trade Area and the fact that surrounding retail nodes along US 1 in the south Dade County area has considerable retail development.
- **Percent Sales Inflow from Secondary Market** – While there is resident expenditure leakage from the Trade Area there is also inflow from residents that live outside the bounds of the Trade Area. This is accounted for in the resident model. However, additional inflow demand will come from non-resident daytime workers in the area, which are also accounted for in the model and into specific segment models detailed below.
- **Sales per Square Foot** – The sales per square foot figures are estimated for stores in the Trade Area based on interviews and other sources of information, including but not limited to the Urban Land Institute's Dollars & Cents of Shopping Centers.
- **Warranted Square Feet** – Is calculated using the following formula: Net Sales Potential (by category)/ Sales per Square Foot (by category)
- **Non-Retail Space** – Is calculated assuming that there is an additional 10-15 percent of "retail" space demanded in traditional retail space that is utilized for non-retail uses such as doctor's offices, hair salons, or other personal services.



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

Figure 20: Downtown Trade Area – Estimated Retail Demand (by Category)
Source: Lambert Advisory

	2014	2019	Change
Estimated Population	17,245	18,761	1,516
Per Capita Income	\$43,421	\$47,238	\$3,817
Total Retail Expenditure Potential	\$172,217,890	\$203,832,559	\$31,614,669
Expenditure Potential by Category			
Food Services & Drinking Places	\$34,828,020	\$41,221,528	\$6,393,507
Shoppers Goods	\$80,702,733	\$95,517,629	\$14,814,896
Convenience Goods	\$66,153,141	\$78,297,115	\$12,143,974
Sales per Square Foot by Category			
Food Services & Drinking Places	\$375	\$375	\$0
Shoppers Goods	\$302	\$302	\$1
Convenience Goods	\$350	\$350	\$0
Supportable Square Footage by Category			
Food Services & Drinking Places	92,875	109,924	17,049
Shoppers Goods	267,336	315,803	48,467
Convenience Goods	195,822	231,770	35,948
Non-Retail Space	55,991	66,219	10,228
Total Supportable Retail Space	612,023	723,716	111,693

Based upon the retail Trade Area model (which is provided in detail in the Appendix, retail demand from resident expenditure (which accounts for inflow and outflow demand factors) is estimated to be 600,000 square feet. This appears to be in line with total retail inventory estimated for the Trade Area based upon the retail supply analysis. Accordingly, retail demand within Trade Area is estimated to increase 110,000± square feet by 2019; however, a portion of this net new retail demand presumes absorption of existing vacant space, as well as support for a reposition of older retail buildings that will likely “fall out” of the market from redevelopment. Regardless, the Trade Area and Downtown area will likely capture its proportionate share of future retail demand and, as a matter of fact, the Downtown’s ability to capture current and future retail demand is not so much from a lack of demand or expenditure potential, but instead related to other issues, such as the limited availability of sizable parcels for (re)development, required roadway



Village of Palmetto Bay – Downtown Master Plan (Economic & Market Assessment)

improvements, and vehicle and pedestrian mobility. Importantly, the mix of retail categories (i.e., the proportion of restaurant and entertainment space, convenience goods space, etc.) implied by these estimates should be taken into consideration as the Village formulates and refines its strategic priorities for the Downtown area and Downtown. As such, the near term opportunity for the first phase of Downtown is approximately 20,000 to 30,000 square feet of retail space comprised primarily of dining establishments, smaller (boutique) shops, and limited service convenience. We also believe there is an opportunity for a grocery store (such as Publix or Whole Foods) within the next 5± years which, as detailed within the retail trade model, is based upon modest population growth for overall trade area and the resultant demand for 50,000 to 60,000 square feet of *convenience goods* during the next 5+ years. The planning team is assuming that the Downtown core has a very strong opportunity to capture this demand provided that initial phases of the residential development are successful. Therefore, this would support an additional 40,000 to 50,000 square feet of retail demand. In all, the retail demand specifically targeted for the Downtown area is estimated to be approximately 60,000 to 80,000 square feet of retail within the next 5± years. Looking further into the horizon, the Village's Downtown area should continue to capture its fair share of retail demand and we believe that over a 10+ year period the total retail demand is estimated to be in the range of 100,000 to 110,000 square feet.



ATTACHMENTS



**Attachment 1:
Village of Palmetto Bay Trade Area – Profile of Select Rental Apartments**

Name of Project	Address	Year Built	Distance from Primary Trade Area	Total Units	Floor Plans		Unit Size AC-Sq. Ft.		Base Asking Rent		Base Asking Rent/Sq. Ft.		Current Occ (%)	Comments
					Range	Avg	Range	Avg	Range	Avg	Range	Avg		
Palmetto Bay Projects														
Coral Colony	17285-95th Ave SW	1971	0	214	Eff. 1 & 2 Bdrms	550-1300	834	\$550-\$865	\$745	\$0.67-\$1.00	\$0.66	N/A	Condo Project with rental units	
Royal Coast	9001 SW 156th St.	1969	<1 mile	174	1 & 2 Bdrms	630-845	689	\$694-\$826	\$738	\$0.98-\$1.10	\$1.07	100.0%	35 units are low income set aside	
Subtotal				388		550-1300	769	\$550-\$865	\$725	\$0.67-\$1.10	\$0.99	100.0%		
Projects North of Palmetto Bay - Dadeland/Kendall/Pinecrest														
Colony at Dadeland	9355 77th Ave SW	1967	5± miles	335	1 & 2 Bdrms	785-1250	988	\$1,011-\$1,980	\$1,179	\$1.10-\$1.24	\$1.19	99.40%	Returbished several times	
Downtown Dadeland	9005 Dadeland Blvd.	2010	5± miles	136	Studio, 1,2 & 3 Bdrms	470-1758	989	\$1,100-\$2,800	\$1,813	\$1.59-\$2.34	\$1.85	96.32%	Condo project marketed as rentals	
Gardens at Pinecrest	8800 SW 68th Ct	1980	5± miles	88	1 & 2 Bdrms	625-825	675	\$925-\$1,200	\$994	\$1.45-\$1.48	\$1.47	90.0%		
Residences at the Falls	13888 90th Ave SW	1972	3± miles	628	1,2 & 3 Bdrms	697-1,097	824	\$1,055-\$1,555	\$1,210	\$1.40-\$1.51	\$1.47	92.0%	Condos & Apts	
Subtotal				1,187		470-1758	878	\$925-\$2,800	\$1,254	\$1.10-\$1.51	\$1.49	94.4%		
Projects South and/or West of Palmetto Bay														
Captiva Club	9005 Dadeland Blvd	2008	1± miles	136	1,2 & 3 Bdrms	702-1,210	1,025	\$800-\$1,025	\$850	\$0.87-\$1.14	\$0.93	95.50%	LHIC project	
Caribe Villa	11105 200 St SW	1972	5± miles	288	Eff. 1 & 2 Bdrms	474-829	683	\$620-\$855	\$740	\$1.00-\$1.31	\$1.08	90.00%		
Cutler Riverside	13888 90th Ave SW	1989	5± miles	200	1,2 & 3 Bdrms	660-1,060	860	\$750-\$1,010	\$880	\$0.95-\$1.14	\$1.02	94.5%		
Old Cutler Village	10415 Old Cutler Road	2003	5± miles	288	1,2 & 3 Bdrms	577-1,082	826	\$750-\$1,100	\$900	\$0.98-\$1.30	\$1.09	96.2%		
Subtotal				912		474-1,210	818	\$620-\$1,100	\$853	\$0.87-\$1.31	\$1.04	94.8%		
Total/Avg				2,467		470-1758	839	\$550-\$2,800	\$1,024	\$0.67-\$2.34	\$1.22	94.5%		



**Attachment 2:
Downtown Palmetto Bay Residential Demand Model**

**Village of Palmetto Bay
Multifamily Housing Demand Projections (Market Rate Housing)
2014 through 2023**

	2010	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	GRAND TOTAL
Population	522,619	559,074	568,578	578,244	588,074	598,071	608,238	618,578	629,094	639,789	650,665	100,937
Total Households	166,635	175,565	183,078	186,557	190,101	193,713	197,394	201,144	204,966	208,861	212,829	505,514
Persons per HH	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	3.1	
% South Dade HH w/Income > \$50K (Future Demand)	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	
No. HH with Income > \$50,000	89,832	91,539	93,278	95,051	96,857	98,697	100,572	102,483	104,430	106,414	108,457	
% MF Dwelling	40.0%	40.0%	40.0%	41.0%	41.0%	41.0%	42.0%	42.0%	43.0%	43.0%	43.0%	
Total Demand for New MF Dwelling Units	66,654	35,933	36,616	38,244	38,971	39,711	41,455	42,240	43,043	44,905	45,758	10,195
Scenario 2 - VPB Mid Point Capture:	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	
e HH Capture:												
Potential HH Demand:	2,875	2,929	3,060	3,118	3,177	3,316	3,379	3,443	3,592	3,661	3,661	
Net New HH Annual Demand:	54	54	55	58	59	59	63	64	64	64	68	
Net New HH Cumulative Demand:	54	54	108	238	297	356	495	558	622	771	840	840
Total Potential Annual Demand (Mid Point)	54	54	55	58	58	59	63	63	64	64	68	68
Total Potential Cumulative Demand (Mid Point)	54	54	108	238	297	356	495	558	622	771	840	840
Additional Demand from Capture of Existing Renter Market												
Primary Comparable/Competitive Set												
% Annual Turnover	3.400	3.400	1.100	1.100	1.100	1.100	1.100	1.100	1.100	1.100	1.100	
% Annual Capture	60.0%	60.0%	60.0%	60.0%	60.0%	60.0%	60.0%	60.0%	60.0%	60.0%	60.0%	
Annual Demand from Existing Capture	33	33	33	33	33	33	33	33	33	33	33	330
Cumulative Demand from Existing Capture	33	33	66	99	132	165	198	231	264	297	330	330
Total Potential Annual Demand (Mid Point)	87	87	88	165	91	92	172	96	97	182	101	1,170
Total Potential Cumulative Demand (Mid Point)	87	87	174	339	429	521	693	789	886	1,068	1,170	1,170



**Attachment 3:
Downtown Retail Trade Area Model**

Resident Expenditure Estimate, By Major Retail Category, Village of Palmetto Bay Trade Area

	2014	2015	2016	2017	2018	2019
Total Population	17,245	17,538	17,838	18,139	18,448	18,761
Per Capita Income	\$43,421	\$44,169	\$45,219	\$45,942	\$46,585	\$47,238
Total Income	\$748,773,436	\$774,448,128	\$806,616,476	\$833,350,892	\$859,383,107	\$886,228,517
% of Total Income Expended on Non-Auto Retail Expenditure	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%
Total Non-Auto Retail Expenditure	\$172,217,890	\$178,123,069	\$185,459,769	\$191,670,705	\$197,658,115	\$203,832,559

Distribution by Store Type - 2007 Census; Miami-Dade County

Expenditure by Store Type - Detail

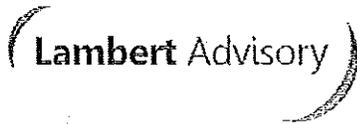
General merchandise stores	\$ 26,763,775	\$ 27,658,649	\$ 28,833,098	\$ 29,792,433	\$ 30,723,069	\$ 31,682,817
Department stores	\$ 13,385,638	\$ 13,844,619	\$ 14,417,897	\$ 14,897,609	\$ 15,362,950	\$ 15,842,889
Other general merchandise stores	\$ 13,383,136	\$ 13,842,031	\$ 14,415,202	\$ 14,894,824	\$ 15,360,109	\$ 15,839,928
Clothing & clothing accessories stores	\$ 25,106,407	\$ 25,967,280	\$ 27,042,534	\$ 27,942,293	\$ 28,816,154	\$ 29,715,282
Clothing stores	\$ 17,290,057	\$ 17,882,916	\$ 18,823,412	\$ 19,243,050	\$ 19,844,164	\$ 20,464,056
Men's clothing stores	\$ 833,382	\$ 867,130	\$ 903,036	\$ 933,082	\$ 962,229	\$ 992,287
Women's clothing stores	\$ 4,862,220	\$ 5,029,002	\$ 5,237,243	\$ 5,411,497	\$ 5,560,541	\$ 5,754,699
Children's & infants' clothing stores	\$ 839,244	\$ 868,020	\$ 903,963	\$ 934,040	\$ 963,218	\$ 993,307
Family clothing stores	\$ 8,481,516	\$ 8,772,338	\$ 9,135,584	\$ 9,439,543	\$ 9,734,415	\$ 10,038,499
Clothing accessories stores	\$ 1,015,427	\$ 1,050,245	\$ 1,093,735	\$ 1,130,124	\$ 1,165,427	\$ 1,201,832
Other clothing stores	\$ 1,259,209	\$ 1,296,180	\$ 1,349,852	\$ 1,394,764	\$ 1,438,334	\$ 1,483,255
Shoe stores	\$ 4,676,330	\$ 4,835,642	\$ 5,035,877	\$ 5,203,430	\$ 5,385,975	\$ 5,533,597
Jewelry, luggage, & leather goods stores	\$ 4,293,361	\$ 4,445,748	\$ 4,629,837	\$ 4,783,881	\$ 4,933,320	\$ 5,087,427
Jewelry stores	\$ 376,969	\$ 389,895	\$ 406,040	\$ 419,549	\$ 432,655	\$ 446,170
Furniture & home furnishings stores	\$ 7,850,540	\$ 8,181,099	\$ 8,499,034	\$ 8,781,814	\$ 9,056,140	\$ 9,339,036
Furniture stores	\$ 4,591,678	\$ 4,749,122	\$ 4,945,774	\$ 5,110,330	\$ 5,269,966	\$ 5,434,590
Home furnishings stores	\$ 3,259,862	\$ 3,411,977	\$ 3,553,260	\$ 3,671,484	\$ 3,786,174	\$ 3,904,446
Floor covering stores	\$ 761,806	\$ 787,927	\$ 820,554	\$ 847,855	\$ 874,341	\$ 901,653
Other home furnishings stores	\$ 2,537,056	\$ 2,624,049	\$ 2,732,706	\$ 2,823,629	\$ 2,911,833	\$ 3,002,793
Electronics & appliance stores	\$ 11,372,866	\$ 11,762,830	\$ 12,249,905	\$ 12,657,454	\$ 13,092,879	\$ 13,450,625
Appliance, television, & other electronics stores	\$ 9,057,999	\$ 9,368,539	\$ 9,756,523	\$ 10,081,142	\$ 10,398,057	\$ 10,720,899
Computer & software stores	\$ 2,183,833	\$ 2,269,167	\$ 2,353,126	\$ 2,441,755	\$ 2,518,030	\$ 2,596,668
Camera & photographic supplies stores	\$ 120,528	\$ 125,075	\$ 130,254	\$ 134,587	\$ 138,792	\$ 143,127
Sporting goods, hobby, book, & music stores	\$ 4,318,185	\$ 4,468,282	\$ 4,651,190	\$ 4,805,845	\$ 4,956,073	\$ 5,110,890
Sporting goods, hobby, & musical instrument stores	\$ 2,851,681	\$ 2,949,462	\$ 3,071,594	\$ 3,173,792	\$ 3,272,935	\$ 3,375,175
Sporting goods stores	\$ 1,492,618	\$ 1,543,798	\$ 1,607,724	\$ 1,661,216	\$ 1,713,169	\$ 1,768,623
Hobby, toy, & game stores	\$ 831,663	\$ 860,179	\$ 895,793	\$ 925,603	\$ 954,517	\$ 984,334
Sewing, needlework, & piece goods stores	\$ 193,924	\$ 200,635	\$ 208,943	\$ 215,895	\$ 222,639	\$ 229,594
Musical instrument & supplies stores	\$ 333,417	\$ 344,850	\$ 359,129	\$ 371,078	\$ 382,670	\$ 394,624
Book, periodical, & music stores	\$ 1,466,504	\$ 1,516,769	\$ 1,579,596	\$ 1,632,153	\$ 1,693,139	\$ 1,755,716
Book stores & news dealers	\$ 1,174,814	\$ 1,215,097	\$ 1,265,412	\$ 1,307,615	\$ 1,349,359	\$ 1,390,478
Pre-recorded tape, compact disc, & record stores	\$ 291,690	\$ 301,672	\$ 314,185	\$ 324,538	\$ 334,779	\$ 345,237
Miscellaneous store retailers	\$ 6,501,920	\$ 6,690,576	\$ 6,926,211	\$ 7,123,388	\$ 7,314,670	\$ 7,511,928
Florists	\$ 350,839	\$ 404,241	\$ 420,979	\$ 434,988	\$ 448,574	\$ 462,587
Office supplies, stationery, & gift stores	\$ 2,277,290	\$ 2,355,376	\$ 2,452,907	\$ 2,534,520	\$ 2,613,694	\$ 2,695,340
Office supplies & stationery stores	\$ 1,457,242	\$ 1,507,209	\$ 1,569,619	\$ 1,621,844	\$ 1,672,507	\$ 1,724,753
Gift, novelty, & souvenir stores	\$ 820,048	\$ 848,167	\$ 883,288	\$ 912,677	\$ 941,187	\$ 970,588
Used merchandise stores	\$ 449,245	\$ 464,650	\$ 483,890	\$ 499,590	\$ 515,603	\$ 531,715
Other miscellaneous store retailers	\$ 2,384,546	\$ 2,469,310	\$ 2,568,435	\$ 2,653,892	\$ 2,736,794	\$ 2,822,286
Pet & pet supplies stores	\$ 569,676	\$ 588,176	\$ 612,531	\$ 632,911	\$ 652,682	\$ 673,070
Art dealers	\$ 514,180	\$ 531,811	\$ 553,832	\$ 572,259	\$ 590,135	\$ 608,570
All other miscellaneous store retailers	\$ 218932,666	\$ 226,336	\$ 235,708	\$ 243,551	\$ 251,159	\$ 259,005
Food & beverage stores	\$ 29,955,261	\$ 30,563,635	\$ 32,268,591	\$ 33,340,072	\$ 34,381,549	\$ 35,455,660
Grocery stores	\$ 27,429,012	\$ 28,369,526	\$ 29,544,251	\$ 30,527,247	\$ 31,450,857	\$ 32,464,256
Supermarkets & other grocery (except convenience) stores	\$ 26,649,072	\$ 27,561,808	\$ 28,703,088	\$ 29,658,097	\$ 30,584,556	\$ 31,539,957
Convenience stores	\$ 780,940	\$ 807,717	\$ 841,163	\$ 869,151	\$ 896,301	\$ 924,300
Specialty food stores	\$ 948,858	\$ 981,394	\$ 1,022,031	\$ 1,056,036	\$ 1,089,025	\$ 1,123,044
Beer, wine, & liquor stores	\$ 1,578,491	\$ 1,632,616	\$ 1,700,219	\$ 1,756,789	\$ 1,811,667	\$ 1,868,260
Food services & drinking places	\$ 26,535,635	\$ 27,446,515	\$ 28,581,979	\$ 29,532,958	\$ 30,455,508	\$ 31,406,878
Full-service restaurants	\$ 12,705,980	\$ 13,141,656	\$ 13,685,825	\$ 14,141,180	\$ 14,582,922	\$ 15,038,464
Limited-service eating places	\$ 9,189,542	\$ 9,503,760	\$ 9,902,519	\$ 10,231,596	\$ 10,551,623	\$ 10,881,235
Drinking places	\$ 1,511,526	\$ 1,563,355	\$ 1,628,090	\$ 1,682,269	\$ 1,734,810	\$ 1,789,002
Health & personal care stores	\$ 20,178,829	\$ 20,870,431	\$ 21,734,634	\$ 22,487,788	\$ 23,189,325	\$ 23,882,776
Pharmacies & drug stores	\$ 16,863,179	\$ 17,441,400	\$ 18,185,614	\$ 18,767,954	\$ 19,354,227	\$ 19,958,814
Cosmetics, beauty supplies, & perfume stores	\$ 1,348,695	\$ 1,394,910	\$ 1,452,671	\$ 1,501,004	\$ 1,547,893	\$ 1,596,245
Optical goods stores	\$ 913,742	\$ 945,073	\$ 984,207	\$ 1,016,953	\$ 1,048,721	\$ 1,081,481
Other health & personal care stores	\$ 1,052,943	\$ 1,089,047	\$ 1,134,142	\$ 1,173,877	\$ 1,203,484	\$ 1,248,255
Home Centers, Paint & wallpaper stores, Hardware Stores	\$ 6,103,824	\$ 6,103,824	\$ 6,366,571	\$ 6,565,067	\$ 6,773,240	\$ 6,984,822
Building material & garden equipment & supplies dealers	\$ 14,588,671	\$ 15,088,502	\$ 15,713,703	\$ 16,238,530	\$ 16,743,726	\$ 17,265,577
Other building material dealers	\$ 6,025,255	\$ 6,231,896	\$ 6,469,947	\$ 6,705,280	\$ 6,915,358	\$ 7,131,380
Lawn & garden equipment & supplies stores	\$ 504,036	\$ 521,319	\$ 542,905	\$ 560,969	\$ 578,492	\$ 596,663
Outdoor power equipment stores	\$ 114,331	\$ 118,252	\$ 123,148	\$ 127,246	\$ 131,221	\$ 135,200
Nursery, garden center, & farm supply stores	\$ 389,704	\$ 403,067	\$ 419,757	\$ 433,723	\$ 447,272	\$ 461,244

Resident Expenditure Estimate, By Major Retail Category, Village of Palmetto Bay Trade Area

Expenditure by Store Type - Summary	2014	2015	2016	2017	2018	2019
General merchandise stores	\$ 26,768,775	\$ 27,656,649	\$ 28,833,093	\$ 29,792,433	\$ 30,723,039	\$ 31,632,817
Clothing & clothing accessories stores	\$ 25,108,407	\$ 25,967,280	\$ 27,042,534	\$ 27,942,293	\$ 28,815,154	\$ 29,715,252
Furniture & home furnishings stores	\$ 7,890,540	\$ 8,161,099	\$ 8,499,034	\$ 8,781,814	\$ 9,056,140	\$ 9,339,036
Electronics & appliance stores	\$ 11,372,898	\$ 11,762,830	\$ 12,219,805	\$ 12,657,494	\$ 13,082,879	\$ 13,480,625
Sporting goods, hobby, book, & music stores	\$ 4,318,185	\$ 4,458,252	\$ 4,631,190	\$ 4,805,945	\$ 4,956,073	\$ 5,110,850
Home Centers, Paint & wallpaper stores, Hardware Stores	\$ 6,103,824	\$ 6,103,824	\$ 6,356,571	\$ 6,568,067	\$ 6,773,240	\$ 6,934,822
Miscellaneous store retailers	\$ 5,501,920	\$ 5,690,578	\$ 5,926,211	\$ 6,123,388	\$ 6,314,870	\$ 6,511,928
Shoppers Goods Subtotal	\$ 87,062,516	\$ 89,838,510	\$ 93,558,543	\$ 96,671,423	\$ 99,691,245	\$ 102,805,400
Food & beverage stores	\$ 29,956,361	\$ 30,983,535	\$ 32,266,501	\$ 33,340,072	\$ 34,381,549	\$ 35,455,560
Food services & drinking places	\$ 26,535,635	\$ 27,445,515	\$ 28,581,979	\$ 29,532,953	\$ 30,455,509	\$ 31,406,878
Health & personal care stores	\$ 20,178,529	\$ 20,870,431	\$ 21,734,634	\$ 22,457,763	\$ 23,159,325	\$ 23,882,776
Convenience Goods Subtotal	\$ 76,670,525	\$ 79,299,481	\$ 82,583,114	\$ 85,330,819	\$ 87,996,383	\$ 90,745,214
Building material & garden equipment	\$ 8,484,847	\$ 8,985,078	\$ 9,357,133	\$ 9,669,463	\$ 9,970,487	\$ 10,281,945
Primary Market Area Retention						
General merchandise stores	70.00%	70.00%	70.00%	70.00%	70.00%	70.00%
Clothing & clothing accessories stores	70.00%	70.00%	70.00%	70.00%	70.00%	70.00%
Furniture & home furnishings stores	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%
Electronics & appliance stores	30.00%	30.00%	30.00%	30.00%	30.00%	30.00%
Sporting goods, hobby, book, & music stores	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%
Home Centers, Paint & wallpaper stores, Hardware Stores	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%
Miscellaneous store retailers	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%
Food & beverage stores	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%
Food services & drinking places	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%
Health & personal care stores	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%
Building material & garden equipment	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
Inflow from Secondary Market						
General merchandise stores	70.00%	70.00%	70.00%	70.00%	70.00%	70.00%
Clothing & clothing accessories stores	70.00%	70.00%	70.00%	70.00%	70.00%	70.00%
Furniture & home furnishings stores	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%
Electronics & appliance stores	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%
Sporting goods, hobby, book, & music stores	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%
Home Centers, Paint & wallpaper stores, Hardware Stores	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%
Miscellaneous store retailers	80.00%	80.00%	80.00%	80.00%	80.00%	80.00%
Food & beverage stores	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%
Food services & drinking places	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%
Health & personal care stores	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%
Building material & garden equipment	5.00%	5.00%	5.00%	5.00%	5.00%	5.00%
Net Sales Potential						
General merchandise stores	\$31,854,842	\$32,947,113	\$34,311,387	\$35,452,995	\$36,560,478	\$37,702,552
Clothing & clothing accessories stores	\$29,876,624	\$30,901,064	\$32,180,615	\$33,251,328	\$34,290,033	\$35,361,185
Furniture & home furnishings stores	\$5,917,505	\$6,120,824	\$6,374,276	\$6,558,360	\$6,792,105	\$7,004,277
Electronics & appliance stores	\$4,094,232	\$4,234,619	\$4,409,965	\$4,556,694	\$4,689,036	\$4,845,825
Sporting goods, hobby, book, & music stores	\$1,038,384	\$1,071,900	\$1,116,268	\$1,153,427	\$1,189,457	\$1,226,614
Home Centers, Paint & wallpaper stores, Hardware Stores	\$1,484,918	\$1,464,918	\$1,525,577	\$1,576,336	\$1,625,578	\$1,676,357
Miscellaneous store retailers	\$7,922,765	\$8,184,429	\$8,533,744	\$8,817,678	\$9,093,126	\$9,377,176
Shoppers Goods Subtotal	\$80,702,733	\$83,469,949	\$86,928,273	\$89,818,484	\$92,624,233	\$95,517,629
Food & beverage stores	\$41,938,806	\$43,378,949	\$45,173,102	\$46,676,101	\$48,134,169	\$49,637,784
Food services & drinking places	\$34,828,620	\$35,922,238	\$37,513,847	\$38,762,003	\$39,972,856	\$41,221,528
Health & personal care stores	\$24,214,235	\$25,044,517	\$26,031,560	\$26,949,346	\$27,791,190	\$28,659,331
Convenience Goods Subtotal	\$100,981,161	\$104,443,704	\$108,768,699	\$112,387,455	\$116,898,214	\$121,518,643
Building material & garden equipment	\$445,454	\$471,717	\$491,249	\$507,694	\$523,451	\$539,802

Resident Expenditure Estimate, By Major Retail Category, Village of Palmetto Bay Trade Area

Sales Per Square Foot	2014	2015	2016	2017	2018	2019
General merchandise stores	\$300	\$300	\$300	\$300	\$300	\$300
Clothing & clothing accessories stores	\$325	\$325	\$325	\$325	\$325	\$325
Furniture & home furnishings stores	\$250	\$250	\$250	\$250	\$250	\$250
Electronics & appliance stores	\$325	\$325	\$325	\$325	\$325	\$325
Sporting goods, hobby, book, & music stores	\$250	\$250	\$250	\$250	\$250	\$250
Home Centers, Paint & wallpaper stores, Hardware Stores	\$225	\$225	\$225	\$225	\$225	\$225
Miscellaneous store retailers	\$275	\$276	\$277	\$278	\$279	\$280
Shoppers Goods Subtotal	\$302	\$302	\$302	\$302	\$302	\$302
Food & beverage stores	\$310	\$310	\$310	\$310	\$310	\$310
Food services & drinking places	\$375	\$375	\$375	\$375	\$375	\$375
Health & personal care stores	\$400	\$400	\$400	\$400	\$400	\$400
Convenience Goods Subtotal	\$350	\$350	\$350	\$350	\$350	\$350
Building material & garden equipment	\$115	\$115	\$115	\$115	\$115	\$115
Average Per Square Foot Sales	\$328	\$328	\$328	\$328	\$328	\$328
Warranted Square Feet						
General merchandise stores	106,163	109,824	114,371	118,177	121,853	125,675
Clothing & clothing accessories stores	91,928	95,080	99,017	102,312	105,503	108,804
Furniture & home furnishings stores	23,672	24,483	25,497	26,345	27,153	28,017
Electronics & appliance stores	12,598	13,030	13,569	14,021	14,459	14,910
Sporting goods, hobby, book, & music stores	4,143	4,238	4,405	4,514	4,753	4,906
Home Centers, Paint & wallpaper stores, Hardware Stores	6,911	6,511	6,780	7,056	7,225	7,450
Miscellaneous store retailers	28,810	29,690	30,808	31,718	32,592	33,490
Shoppers Goods Subtotal	267,335	276,394	287,728	297,186	306,353	315,893
Food & beverage stores	135,287	139,926	145,720	150,568	155,272	160,122
Food services & drinking places	92,875	96,059	100,037	103,365	106,594	109,924
Health & personal care stores	60,636	62,611	65,204	67,373	69,478	71,648
Convenience Goods Subtotal	258,697	298,596	310,961	321,307	331,344	341,694
Building material & garden equipment (incl. SO)	0	0	0	0	0	0
Total Warranted Retail Space	558,033	574,991	598,698	618,493	637,696	657,497
Non-Retail Space (Services)	55,603	57,459	59,869	61,849	63,770	65,750
Non-Retail Percent	10.00%	10.00%	10.00%	10.00%	10.00%	10.00%
Total	611,636	632,450	658,567	680,343	701,466	723,246
Annual Net New Demand		20,854	26,067	21,786	21,124	22,322
Cumulative Net New Demand		20,854	46,921	68,707	89,830	111,610



Memorandum

To: Mr. Ed Silva, Village of Palmetto Bay
From: Lambert Advisory, LLC
Date: January 7, 2015
Subject: Village of Palmetto Bay – Downtown Master Plan Economic and Market Assessment
(Supplemental Appendix)

The Memorandum herein represents a Supplemental Appendix to the Village of Palmetto Bay – Downtown Master Plan (Economic and Market Assessment) completed in April 2014. The Supplemental Appendix represents an assessment of economic benefits associated with the estimates of demand (by use) indicated within the Economic and Market Assessment. Specifically, the assessment of economic benefits includes one time construction impacts and recurring impacts upon program build out, and evaluates select benefits such as estimates of employment, wages, and ad valorem tax revenue.

In the absence of any defined development program associated with the estimates of demand by use, we have completed the analysis herein on an order-of-magnitude basis. As such, development and performance information (i.e., development timing, development costs pricing, absorption, and operating performance) utilized to derive select benefits is based upon information obtained from our research as part of the Economic and Market Assessment; but, highly generalized in the application herein. Importantly, Lambert has not independently verified the development cost and/or operating performance data and cannot attest to the accuracy of the estimates that have been utilized to determine the select benefits. Furthermore, the economic impacts as stated herein from construction and operation of any proposed development are presented in current (2015) dollars. Any change in development and/or operating assumptions from those utilized as part of this analysis can have a material impact on the direct and in-direct economic indicators stated herein.

The following table provides a summary of select benefits from the potential demand for approximately: 1,200 residential units; 135,000 square feet of office space; and 100,000 square feet of retail:

Village of Palmetto Bay Estimates of Select Benefits from Potential Development Program Order of Magnitude Analysis									
One-Time Construction Impacts	Residential		Office		Retail		Total		High
	Trending	High	Trending	High	Trending	High	Trending	High	
Average Annual Direct & Indirect Employment	245	554	6	193	180	140	545	787	
Average Annual Direct & Indirect Wages	\$ 21,743,414	\$ 60,802,745	\$ 2,88,616	\$ 4,377,232	\$ 17,65,562	\$ 1,888,213	\$ 25,648,292	\$ 37,063,195	
Recurring Impacts (Upon Program Build Out)									
Total Annual Employment	Residential		Office		Retail		Total		High
	Trending	High	Trending	High	Trending	High	Trending	High	
Total Annual Employment	30	43	587	1,174	571	629	1,188	1,845	
Total Annual Wages	\$ 1,165,244	\$ 3,650,904	\$ 22,800,208	\$ 45,600,417	\$ 22,977,029	\$ 24,416,731	\$ 46,167,581	\$ 71,569,033	
Additional Village Operating Costs	Residential		Office		Retail		Total		High
	Trending	High	Trending	High	Trending	High	Trending	High	
Additional Village Operating Costs	\$ 783,464	\$ 1,081,574	\$ 22,586	\$ 165,173	\$ 167,298	\$ 174,072	\$ 352,844	\$ 320,768	
Additional County (Operating, Debt, & Capital) Costs	Residential		Office		Retail		Total		High
	Trending	High	Trending	High	Trending	High	Trending	High	
Additional County (Operating, Debt, & Capital) Costs	\$ 1,595,473	\$ 2,161,670	\$ 172,695	\$ 345,891	\$ 140,715	\$ 154,786	\$ 464,905	\$ 2,161,847	
Total Additional Costs	\$ 2,378,937	\$ 3,243,244	\$ 395,281	\$ 783,994	\$ 318,013	\$ 338,858	\$ 717,823	\$ 1,482,615	
Total Ad Valorem	\$ 5,981,882	\$ 8,474,533	\$ 607,079	\$ 1,294,157	\$ 527,249	\$ 579,974	\$ 745,210	\$ 10,348,465	