



2024 Transportation Sales Tax Discussion

Board of County Commissioners

March 26, 2024





Presentation Outline

- **Introduction**
- **Community Re-Engagement**
- **Updated Project Cost Estimates (2025 dollars)**
- **Legal Documents/Approvals**
- **Next Steps/Summary**



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Introduction

Recap of the February 6, 2024, BCC Discussion Regarding Interest in a Transportation Sales Tax Referendum in 2024

Remarks included:

- **Transportation Challenges Still Exist**
- **Amount of time to prepare for Transportation Initiative (April 23, 2024)**
- **Implementation Process/Capacity**
- **Consider Millage Reductions**
- **State of the Economy**
- **Discussion on Funding Allocation**
- **Desire to continue discussing the Transportation Sales Tax Referendum efforts**



Introduction

Purpose of these work sessions is to determine the Boards interest in advancing a Sales Tax Referendum on the 2024 Ballot



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Community Meetings

- **Transportation Community Meetings**
 - **March 21, 25, & 27 | April 1, 2, 3, & 18**
- **Mayor's Welcome Video on Transportation | Communications Department**
- **Brief Presentation by Senior Staff at Transportation Meeting**
- **Resident Comment and Feedback**
- **Vendor Tables with Public Works & Transportation Partners**
- **Interactive Dashboard Mapping Tool Demonstrations**



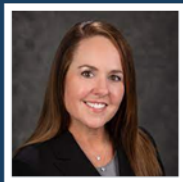
Community Meetings



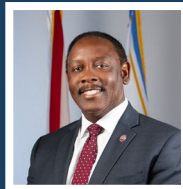
District 4
Thursday, March 21, 2024, 6pm-7:30pm
The Pavilion at Avalon Park



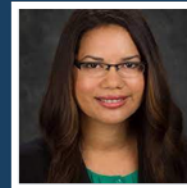
District 3
Monday, March 25, 2024, 6pm-7:30pm
UF/IFAS Extension Center Auditorium



District 1
Monday, April 1, 2024, 6pm-7:30pm
Windermere High School Gymnasium



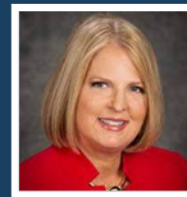
Mayor Jerry L. Demings
Wednesday, March 27, 2024, 6pm-7:30pm
LYNX Central Station



District 5
Tuesday, April 2, 2024, 6pm-7:30pm
Goldenrod Recreation Center



District 6
Wednesday, April 3, 2024, 6pm-7:30pm
Orange County Multicultural Center



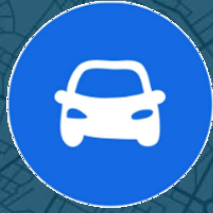
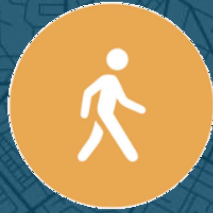
District 2
Wednesday, April 18, 2024, 6pm-7:30pm
Wekiva High School Media Center



Communications

- Updated the Transportation Survey | Multiple Languages
- Transportation Initiative Website Launched
- Promoting Transportation Community Meetings
 - Commissioner Engagement, Orange County Government Website, and Social Media





TAKE THE TRANSPORTATION SURVEY



ocfl.net/Transportation



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- Economic Impact Analysis
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Why Transportation?



Call for Transportation Solutions



Transportation Proposed Improvements

Purpose for a Dedicated Transportation Funding Source:

- **Improve** Transit Availability and Frequency
- **Enhance** Bicycle & Pedestrian Safety
- **Eliminate** Fatal and Serious Injury Crashes
- **Reduce** Traffic Congestion
- **Maintain** and Repair Existing Roads



Project Categories

Mobility & Accessibility

Increasing access to job opportunities, housing, and daily needs with a robust transportation network

Safety

Creating and improving streets to be safe for all users and support healthy and vibrant communities

Maintenance

Caring for prior infrastructure investments to meet current and future needs



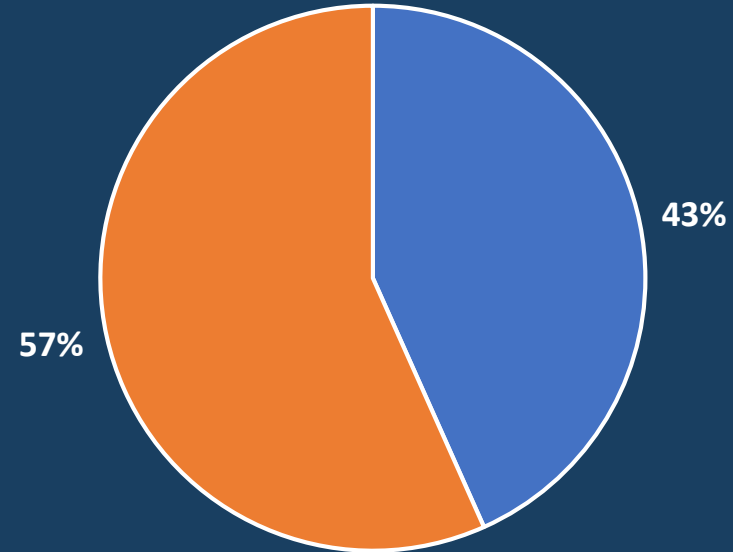
2022 & 2024 Initiative Comparison

2022 Unfunded Needs - Project Type Distribution



- Major Roadway Improvements for Capacity and Multimodal Mobility
- Complete Streets and Safety Retrofits

2024 Unfunded Needs - Project Type Distribution



- Major Roadway Improvements for Capacity and Multimodal Mobility
- Complete Streets and Safety Retrofits



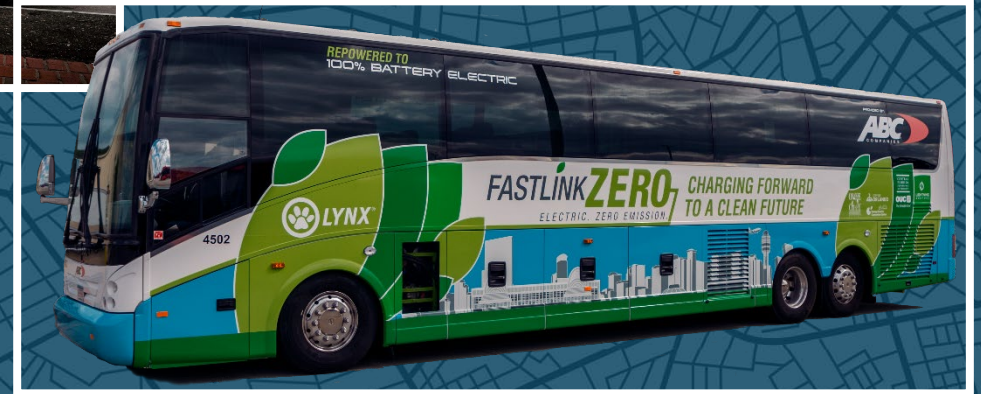
County - Projected Cost Estimates

County Projects	Projected Costs (2025)
Safety Improvements	\$2.8B
Mobility & Accessibility Improvements	\$2.9B
Operations & Maintenance Improvements	\$1.9B
Total Projected County Project Cost	\$7.6B

County Projects	Projected Costs (2022)
Safety Improvements	\$1.7B
Major Roadway Improvements	\$3.8B
Operations & Maintenance Improvements	\$1.6B
Total Projected County Project Cost	\$7.1B



Transit

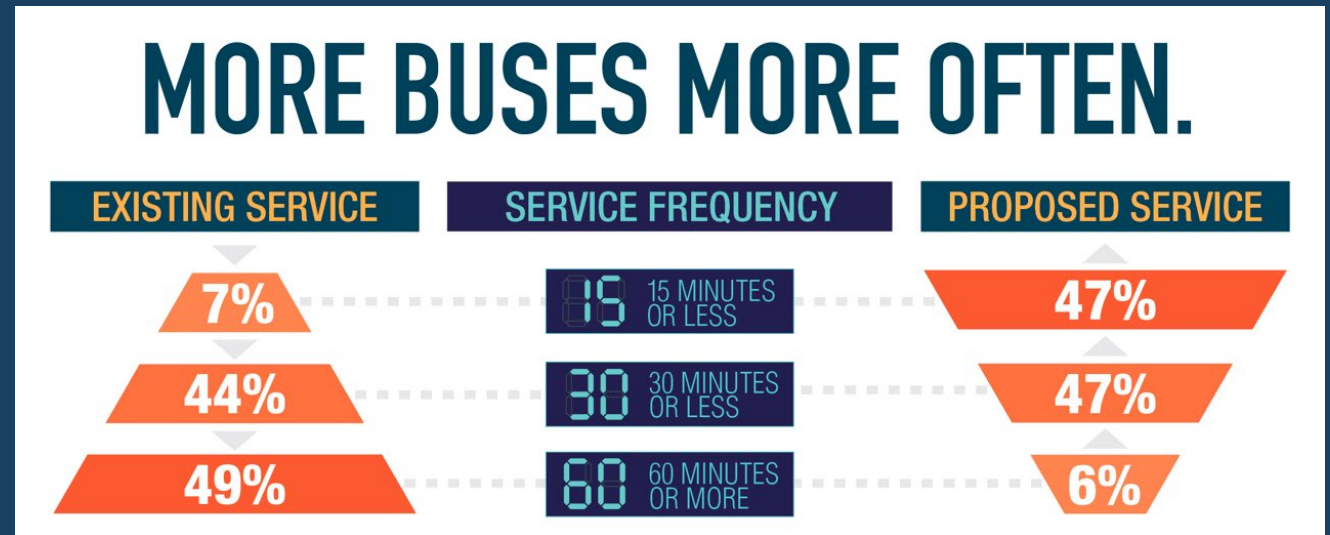




LYNX – Transit Plan Summary



- Systemwide Bus Frequency Improvements
- New High Capacity & Priority Transit Corridors
- New High Speed Regional Express Routes
- Expansion of SunRail Service & Sunshine Corridor
- Job Growth
 - Pine Hills Transit Center - 165 Jobs
 - + 241 buses – 725 Jobs





LYNX – Transit Plan – Cost

**Total 20 Year Capital and Operating Costs: \$12.3 B
(Including Federal and State Funds)**

20-year capital and operating costs for Orange County:



	2025 Dollars	2022 Dollars
Total Transit Costs	\$12.3B	\$11.4B
LESS Federal and State Funds	(\$5.5B)	(\$6.0B)
TOTAL Orange County Shares:	\$6.8B	\$5.4B





Transit Plan - Cost Estimates

Annual Orange County Share: \$340M

The 20-year capital and operating costs for Orange County, by transit element, is indicated below:

Transit Plan Projects	Projected Costs* (2025)	Projected Costs (2022)
Bus	\$ 4.3B	\$3.3B
Paratransit	\$539M	\$484M
Rail	\$ 1.7B	\$1.1B
High-Capacity Corridors	\$256M	\$344M
Public Private Partnership (P3)	-	\$180M
Total Orange County Share 20-year cost	\$ 6.8B	\$5.4B

- 2022 Annual Orange County Share: \$270M
- 2025 Annual Orange County Share: \$340M
- Rail increase is due to Sunshine Corridor
- Public Private Partnership (P3) was previously assumed to support rail connection between OIA and OCCC. Replaced by Sunshine Corridor
- Fewer High-Capacity Corridors are proposed in 2024 plan, resulting in the decrease

*Estimated Costs in 2025 \$



Charter County and Regional Transportation System Surtax

Summary of Needs



County Needs	\$ 7.6B
Transit Need	\$12.3B*
Municipal Needs	TBD
Program Management	TBD
Estimated TOTAL Transportation Needs	\$20B

1/2% would generate:

- \$10 Billion for 20 years
- **\$379.5 Million Annually

1% would generate:

- \$20 Billion for 20 years
- **\$759 Million Annually

* Includes \$5.5B in Federal and State Revenues

** Estimates-assumes an average 3% increase a year



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Statutory Framework

Charter County and Regional Transportation System Surtax

§212.054 & §212.055(1), Florida Statutes

- Authorizes charter counties to levy a discretionary sales surtax of up to 1%
- Surtax proceeds can only be applied to transportation uses listed in the statute in whatever combination the county commission deems appropriate
- Requires creation of a trust fund within county accounts
- Surtax is subject to approval of the voters in a referendum held during a general election
- Ordinance required to levy surtax



Statutory Framework

§212.055(1)(d) permissible uses are:

- Planning, development, construction, operation, and maintenance of roads & bridges in the county
- Planning, development, expansion, operation, and maintenance of bus and fixed guideway transportation systems, and on-demand transportation services; and
- Principal and interest on bonds



Legal Documents

Ordinance

- **Levies the Charter County & Regional Transportation System Sales Surtax subject to referendum approval**
- **Creates separate county trust fund for surtax proceeds**
- **Requires adoption of the Transportation Improvement Plan (contained in the Resolution)**
- **As a condition of distributing proceeds to municipalities and transportation authorities, requires Interlocal Agreements that contain audit and detailed performance and financial reporting requirements**



Legal Documents

Ordinance, cont'd

- Requires routine financial audits by the County Comptroller
- Calls a referendum at the next General Election: November 5, 2024
- Requires publication of two Notices of Referendum
- Contains the ballot language
- Automatically repealed if surtax is not approved by majority of Orange County electors



Legal Documents

Resolution

- **Adopts the Transportation Improvement Plan:**
 - **Allocates surtax proceeds into funding categories**
 - **Includes project lists**
 - **Creates technical committee and citizens oversight board**



Ballot Language

- **§101.161, F.S., requires that the ballot summary and title be included in the ordinance**
- **Ballot language must be clear and unambiguous, and must include an explanatory statement, not exceeding 75 words, of the chief purpose of the measure**
- **Ideally ballot language would ask citizens to vote for or against surtax funding to:**
 - **Reduce traffic congestion,**
 - **Expand and improve mass transit,**
 - **Widen major roadways countywide,**
 - **Enhance traffic signalization and lighting,**
 - **Improve pedestrian and cyclist safety, and**
 - **Support municipal & county roadway maintenance**



Ballot Language

Ballot

Orange County, Florida

Charter County and Regional Transportation System Surtax

Shall a Charter County and Regional Transportation System Surtax at the rate of one percent (1%) be levied in Orange County, Florida for a period of “X” years with revenue deposited into a trust fund dedicated exclusively to transportation and transit improvement uses authorized by law, with oversight and accountability for the revenue provided by a citizen oversight board and the elected comptroller, as approved by the Board of County Commissioners?

_____ FOR the one-cent sales tax

_____ AGAINST the one-cent sales tax



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2024 Timeline

February
6,
2024

BCC Work
Session #1

March
26,
2024

BCC Work
Session #2

April
9,
2024

BCC Work
Session #3
**(rate and
duration of
tax needs to
be decided
during this
meeting)**

April
23,
2024

BCC Public
Hearing
Decision on
placing
referendum
on ballot
- Ordinance
- Resolution

May
9,
2024

Ordinance to
Office of
Program
Policy Analysis
and
Government
Accountability

June/July
2024

OPPAGA Audit

July/August
2024

Submit ballot
language to
Supervisor of
Elections

November
5,
2024

Election Day

January
1,
2025

Effective
date of
surtax if
referendum
passes





Summary

- **Community meetings ongoing**
- **Actively encouraging residents to take the Transportation Survey**
- **Cost Estimates updated: County projects (\$7.6B) and LYNX projects (\$12.3B)**
- **Municipalities Project List and Cost Estimates due by March 29, 2024**
- **Up to 1% Surtax requires approval by Referendum at the next General Election on November 5, 2024**
- **If Approved, a Resolution will allocate surtax proceeds into funding categories, and create the Technical Committee and Citizens Oversight Board**



Next Steps

- **BCC Work Session #3 – April 9**
 - Update County Projects List
 - Update LYNX Projects List
 - Status on Municipal Project List
 - Transparency Provisions – Oversight and Accountability
 - **Sales Tax Duration and Rate**
- **BCC Public Hearing – April 23**
 - Ordinance/Ballot Language
 - Resolution (project list, allocation, oversight)



Next Steps

Seeking Board Feedback and Input on Interest in Placing a Transportation Sales Tax Referendum on the November 2024 ballot:

What additional information can County Staff provide to assist with this decision?



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