Balancing Land-Use Conflicts and Solutions

AAPA Capital Projects Seminar
Norfolk, Virginia

May 8-9
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AAPA-CAPITAL PROJECTS SEMINAR

“BALANCING LAND USE CONFLICTS AND SOLUTIONS”

Scott Shepard, CCIM, MBA, CPE, MPE
Director of Real Estate
Canaveral Port Authority
May 8, 2018
Location
PORT CANAVERAL
“Tale of Two Ports”

- Man made port
- Dedicated in 1953
- Began as a small fishing and oil port

Commercial fishing vessel lining the newly built Canaveral harbor (c.1950’s)

Port Canaveral stevedores load Central Florida lumber on to a vessel for export (c.1957).
Port Canaveral’s four business lines – Cargo, Cruise, Recreation and Real Estate (c.2015)

Space X Falcon 9 rocket booster passing by Port Canaveral’s auto terminal (c.2016).
65 Years ago

Present Day
## Mixed Use Development

### Typical Port
- Cruise Line
- Cargo
- Warehouse

### Port Canaveral
- Cruise Line
- Cargo
- Warehouse
- Retail
- Restaurants
- Office
- Marinas
- Car Rental
- Vacant Land
- Parking
- Recreation/Events
- Beach
- Campground
Development Projects (500 million + over next 5 years)

- **CRUISE:** NEW CRUISE TERMINAL--$150 Million
- **CARGO:** NEW NCB-8-----$22 Million
- **CARGO/CRUISE/RE:** 55 acre inland port parcel
- **CARGO/RE:** LNG Terminal
- **CARGO/RE:** Space Port area
- **CARGO/RE:** Land for import/export of cars
- **CRUISE/RE:** New Transportation Center-Rental Cars
- **REAL ESTATE:** Cove Commercial District- Harbor Basin
PORT CANAVERAL OVERVIEW

1500 Acres
  1000 Acres uplands
  500 Acres water/harbor

-- 6 Cruise terminals/ 4.5 million passengers

-- $100 Million Annual Budget

-- 240 tenants and subtenants
Cruise and Cargo

-- 685 Cruise Ship visits per year

-- 450 Cargo Ship visit per year

-- 730 Casino Ship trips per year
2018 YEAR END PROJECTIONS

➤ $100 million in total revenue
  ➤ $ 74 million- cruise
  ➤ $ 8 million- cargo
  ➤ $ 8 million- real estate lease income
  ➤ $ 3 million- recreation/event revenue
  ➤ $ 7 million- other income
$2.2 billion net economic impact for Central Florida

$1.1 billion in direct and indirect wages and salaries

$347.7 million in local spending

$100 million in state and local taxes

22,000 Central Florida jobs related to the Port’s operating activities
CRUISE

- Second busiest cruise port in the world based upon passenger movements
  - Accounts for approximately 80% of revenue
  - 9 year round and seasonal homeported vessels
  - More than 20 cruise lines make port of calls throughout the year
- Home fleet includes vessels from Carnival, Disney, Norwegian Cruise Line and Royal Caribbean
- Home to Victory Casino Cruises who sail twice daily year round
- New $150 million Cruise Terminal 3 project underway to come online in November 2019
PORT CANAVERAL
Cargo Overview

FY 2016:
337 Ship Visits
Tonnage: 5.5 million

FY 2017:
400 cargo ships
Tonnage: 5.9 million

FY 2018 (Projected):
450 Cargo Ship visits
CARGO

- 7 types of cargo
  - Liquid Bulk
  - Dry Bulk
  - Break-bulk
  - RoRo-Cars
  - Containerized
  - Heavy Lift and Project
  - Space/Rockets
REAL ESTATE & COMMERCIAL DEVELOPMENT

- Inland Logistics Center
  - 246,000 SF
  - 20 minutes to the Port
  - Rail access

- Parrish Medical Center opened on Port
- SpaceX leased and is expanding a rocket refurbishment hangar
- Cove Commercial Development
- 240 Tenants and Subtenants
RECREATION

- **Jetty Park**
  - 45 acres
  - 210 Campsites
  - 165,000 annual visitors
  - 1,200 ft lighted fishing pier
  - Pristine beach with year-round lifeguards and beach amenities

- **The Exploration Tower**
  - 7 Story Vertical Exhibition Hall, Theater, Meeting Room, Gift Shop and Cafe

- **Events**
  - Public and Private
  - Rocket launch viewing
  - Fall 2018– Commission Ceremony of the USS Indiana Sub
Managing Growth and Change with the speed of multiple Race Boats!
Overcoming Conflict and Solutions
Overcoming Conflict and Solutions

• CHANGE………….CHANGE………….CHANGE

• Internal Conflicts (Port Departments and Supportive groups)
• External Conflicts (Public, Businesses, Tenants, Environmental)

• Security, Safety, Engineering, Risk Mgt., Building Official, Finance, Fire Dept., Sheriffs Dept., Government (Coast Guard, Air Force, Navy), NASA, Citizens (local and tourist), Port Tenants and Berth users, Developers, and Recreation
Overcoming Conflict and Solutions

• Having enough land for growth
• Competing uses = balance now/future
• Inland Port Use
• Inland or on-Port Rail?
• Multi-use berths (Cargo, Cruise, Space vessels)
• Environment Issues (ACOE, Wetlands, Turtles, Manatees, fuel)
Challenges

- Rail
- LNG
- Adequate amt. of land
- Mixed use Port
- Security
- Land for Space Industry
- Environmental issues
- Events

- Tourism/Visitors
- Cruise Volume
- Logistics (bridge/traffic)
- Parking
- Transportation
- Rocket launches/Schedule
- Military
- Weather
CASE STUDY #1

“RAIL”
Overview

• Past 5 years— Huge Port expansion plans with an emphasis on **Cruise**, **Cargo**, **Commercial Development**

• Rail would enhance Cargo Development efforts for Container volume growth
Local Opposition and Protests
Results

• Three to Four years of study
• Rail would enhance Cargo Development efforts—questionable
• Massive effort to defeat by local homeowner association
• CEO is fired
• New CEO allows study to continue with one route only, thru the USAF base vs. across the Banana River
• CEO and Port Commission pull the plug on study and negotiations with the USAF due to lack of need
Lesson Learned

• Have a preliminary plan that Port can review and use to promote BEFORE it is rolled out to the Public
• Do not rush the Project
• Roll out to local groups and residents
• Promote and educate the public about plan
• Use the media to promote
• Host public meetings
• Address all concerns
  • Educate, promote, educate, promote, educate
  • DO NOT RUSH the process
CASE STUDY #2

“MASTER PLAN”
STRATEGIC MASTER PLAN – COMMERCIAL DEVELOPMENT

- Port and Commercial development is scattered throughout the Port today
  - Reflects the uses of land when there was little demand

- **Moving forward**, the Port must prioritize the finite resources for *maritime purposes*
  - Support maritime activities
  - Create and maintain revenue stream over time
  - Continue to grow as an economic powerhouse in the region
  - Protect and maintain commercial fishing industry (Port Charter)
  - Support value of existing tenants
  - Provide for Recreation (Port Charter)
STRATEGIC MASTER PLAN

- Consultant and Staff /Departments develop a preliminary Master Plan draft
- Draft plan released for public comment
- The plan is a look ahead from today and out over the next 30 years
- The plan evaluates all areas of Port business: Cruise, Cargo, Parks and Recreation and Commercial Development, Parking

Goals of the Strategic Master Planning process:
- Balance traditional and historical uses while growing to meet future demands
- Grow by using the existing land and berth resources more efficiently
- Do not compete with businesses outside the Port
- Develop for flexibility
STRATEGIC MASTER PLAN
INTERMODAL CENTER

- Transportation Hub
- Car Rental, Buses, Taxi, Parking
- Reduce traffic in Port
- Busy port day (4-6 cruise ships), parking at capacity with few overflow options
- Enhances options for visitors
STRATEGIC MASTER PLAN – THE COVE

- Adds 3000 feet of waterfront and frees up 500 feet of harbor-side bulkhead
- Builds upon success of historic restaurant row by creating an inner cove
- 6-8 new Restaurants, retail shops, Public Amphitheater for events, marina, conference center
- New shallow draft berthing space for smaller vessels that do not require a deep water berth
- Working waterfront concept would include a section for the major work boats TUGS and Shrimp boats at the Port
- Becomes a Public meeting place
Process

- Project “Conceptual” roll out to Port Commission
- Developed preliminary layouts
- Meeting with individual stakeholders (internal and external)
- Adjustments to preliminary layouts
- Three Public meetings—input
- Internal meetings as to Public comments
- Adjustments to layouts
- Second Public Meeting
- Submission to Port Commission
Lesson learned and results

• Input is valuable to the success of a potentially controversial project due to change
• Extra time is valuable
• Flexibility pays off

• **Result:** The Port Commission approved the Master Plan......5 to 0
  There was **NO Public objection** at the meeting
Summary

• Conflict will come with Change
• The challenge for the Port is to find solutions
• Communication to all stakeholders is critical including both Internal and External stakeholders
Managing Growth and Change with the speed of multiple Race Boats!
Thank you!
QUESTIONS?
A NEW INDUSTRY IN THE PORT OF NEW BEDFORD

Developing Compatible Infrastructure and Economic Development for the Offshore Wind and Commercial Fishing Industries.

2018 Capital Projects Seminar
May 8, 2018
Norfolk, VA
The Offshore Wind Opportunity
The Natural Resource
Preventing Conflict between Multiple Users
Scallop Fishery
Current OSW Developments
How do we capture the OSW opportunity while supporting our existing users?
## 2016 Economic Impact Report

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Economic Value</td>
<td><strong>$9.8 billion</strong>&lt;br&gt;• $3.3 billion of direct business revenue&lt;br&gt;• $6.1 billion of related output&lt;br&gt;• $429.4 million of re-spending of direct income and local consumption purchases</td>
</tr>
<tr>
<td>Jobs Generated by Port Activity</td>
<td><strong>36,578 jobs</strong>&lt;br&gt;• Direct Jobs: 6,225 (91% from seafood industry)&lt;br&gt;• Induced Jobs: 4,101 (92% from seafood industry)&lt;br&gt;• Indirect Jobs: 2,512 (88% from seafood industry)</td>
</tr>
<tr>
<td>Federal, State, and Local Taxes</td>
<td><strong>$1.2 billion</strong>&lt;br&gt;• $150.5 million direct, induced and indirect&lt;br&gt;• $358.1 million direct, induced, and indirect federal&lt;br&gt;• $200.7 million related taxes/local taxes&lt;br&gt;• $534.7 million related federal taxes</td>
</tr>
</tbody>
</table>
Commercial Fishing

• For the 17th consecutive year, New Bedford was named the #1 Fishing Port in the country by value
• Scallops, groundfish, pelagics, offshore and inshore lobster, surf clams, quahogs, atlantic red crab, herring, mackerel, conch, slime eel, etc
• Global processing hub
The East Coast Fishing Industry is Gravitating to New Bedford

- The Port of New Bedford supports fishing economies from Maine to Florida –
- the pie chart illustrates the number of out-of-state fishing vessels that utilize the municipal docks
- North Terminal would offer much needed berthing space
- There was a 172% increase in new out-of-state vessels from 2015-2016 (from 5 new vessels in 2015 to 12 in 2016).
- There was 200% increase in new out-of-state vessels from 2016-2017 (12 vessels to 36 vessels).
Diversity and Versatility in Water-Dependent Activities

- Bulk, breakbulk Cargoes
- Burgeoning recreational destination
- 26 cruise ships in 2017
- Future center for offshore wind staging
- Marine research leader

- All-purpose marine services industry
- Ferry service to Nantucket, Martha's Vineyard and Cuttyhunk
- Marine technology leader
Dredging New Bedford Harbor
Focus Area North
Focus Area South
Focus Area South
Thank you!

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Balancing Land-Use Conflicts and Solutions
AAPA Capital Projects Seminar – 8 May 2018
Heather Wood, CPE – Regional Director, Ports & Intermodal
Craney Island Marine Terminal

• The Port & Project Overview
• Land-use Constraints – Construction & Mitigation
• Challenges and the Path Forward
• Creative Solutions – Think Outside of the Box
THE PORT - A HISTORY OF WELCOMING BIG SHIPS
Project Overview

FUTURE CONSTRUCTION : TERMINAL

- Craney Island Marine Terminal (CIMT)
  - 2.87 million container capacity
  - 522 acres
  - 8,400 ft long berth
  - 15 container cranes
  - On-terminal rail access to NS & CSX
Project includes expanding CI to the East by 522 Acres.

1. Extend useful life by 10 years
2. Suitable platform for a Port Facility

Mitigation work represents $65M of the overall project cost of $976M.

Primary Mitigation Components include:
1. Creating or restoring 56 acres of wetlands within the Elizabeth River Watershed
2. Three Sediment Remediation Sites
3. Creating 16 Acres of Oyster Reefs
The Land Use Challenges - CIMT
The Land Use Challenges - CIMT
A Creative Solution to Permitting

A “LANDSCAPE APPROACH”

411 ACRES RESTORATION

Legend

- Sediment Restoration
- Wetlands Creation
- Oyster Reef Creation
- Existing Restoration Sites
Land Use Challenges - Mitigation

- **Ragged Island**: 8 acres of coastal habitat that will include four acres of marsh and four acres of wetland and shallow water habitat.

- **Hoffler Creek**: 1 acre of oyster ground is to be constructed within the Hoffler Creek Wildlife Preserve, which is located adjacent to Hoffler Creek, a tributary to the James River.

- **Lafayette River Oyster Reef Creation**

- **Scuffetown Creek**: Sediment remediation will be conducted at Scuffetown Creek in the Elizabeth River watershed. The U.S. Army Corps of Engineers, Norfolk District has completed the sampling and design phases for this site.

- **Jones & Gilligan Creek**: This site abutting Jones and Gilligan Creeks exhibits favorable conditions for wetlands creation. There is potential for approximately 21 acres of tidal mitigation. Oyster reefs will be created at Gilligan Creek.

- **Paradise Creek Park**: The Elizabeth River Project is overseeing this site’s development. 11 acres of tidal wetlands creation will be constructed at this site.

- **Gilmerton Bridge Oyster Reef Creation**

- **Deep Creek**: These sites about Deep Creek, approximately 1 mile from the mainstem of the Southern Branch. Approximately 10 acres of marsh are proposed for this site.

- **Money Point North**: The Living River Restoration Trust has completed a conceptual remediation plan for this site. The Craney Island Mitigation Plan will clean about 10 acres at this site.

- **Republic**: The 52-acre site is considered a primary site for sediment remediation.
The Path Forward
A Creative Solution - Construction

Beneficial Use of Dredged Material Pilot Program
WRDA 2016 Section 1122
Pilot Project Proposal for the Hampton Roads Regional Sediment Management Project

Submitted by:
The Port of Virginia
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1. Name and location of the proposed project.

Hampton Roads Regional Sediment Management Project located in Hampton Roads, Virginia.

The cross dikes have been constructed to ≈ 8 ft. above water

SE Cell construction rendering
A Creative Solution - Construction
A Creative Solution - Mitigation
A Creative Solution - Mitigation
LEVERAGING FEDERAL INVESTMENTS

- The Port contributing 9 state & private dollars for every one federal dollar
- $300M federal funding needed to complete SE Cell Main Dike

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<tr>
<th>Project</th>
<th>State $M</th>
<th>Federal $M</th>
<th>Status</th>
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<tr>
<td>VIG</td>
<td>$350</td>
<td></td>
<td>Funded</td>
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<tr>
<td>NIT</td>
<td>$375</td>
<td></td>
<td>Funded</td>
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<tr>
<td>CIEE SE Cell</td>
<td>$175</td>
<td>$175</td>
<td>$300M Needed to Complete</td>
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<tr>
<td>NHC</td>
<td>$200</td>
<td>$100</td>
<td>Chief’s Report 6/18 – to WRDA</td>
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<tr>
<td>CIEE NE Cell</td>
<td>$225</td>
<td>$225</td>
<td>Not Funded</td>
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<tr>
<td>CIMT</td>
<td>$2,500</td>
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<tr>
<td>CIMT Road &amp; Rail</td>
<td>$650</td>
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<tr>
<td>Total</td>
<td>$4,475</td>
<td>$500</td>
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</tbody>
</table>
LEVERAGING FEDERAL INVESTMENTS

• Providing $300M (FY19 & FY20) to complete Phase 1 will:
  • Create 1,100 immediate jobs
  • Produce $16B in national economic benefits & 54,000+ sustainable jobs after port construction
  • Benefit-to-Cost Ratio of 9.4 @ 3.375% discount rate (4.7 at 7%)
QUESTIONS
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