

August 2020 Planning & Operations Committee Meeting

8/21/20



2020 CIP Mid Year Review

» 2020 Completed Projects Total
\$10,827,707

- \$1,867,809 Funded by Grants
- \$1,626,805 Funded by Port Authority
- \$7,100,000 Funded by Tenants/NMTC
- \$233,093 Funded by ParkSmart

» 2020 In Progress Projects Total
\$12,295,356

- \$11,437,356 Funded by Grants
- \$453,000 Funded by Port Authority
- \$80,000 Funded by Tenants
- \$325,000 Funded by ParkSmart

2020 CIP Mid Year Review

Facility 1 & Facility 3

» Completed

- Facility 3 Phase 2 Cell Expansion - \$1,457,992
(Funded by Healthy Lake Erie Grant)

» In Progress

- Purchase of New Mobile Harbor Crane - \$5,500,000 (Funded by ODOT MAP Grant)
- Facility 3 Phase 3 Cell Expansion - \$644,429 (Funded by Healthy Lake Erie Grant)
- Front St. & Millard Ave. Roundabouts - \$5,292,927 (Various State and Local Funding)



2020 CIP Mid Year Review Ironville

» Completed

- Additional 2 Acres Paved Storage – \$600,000 (Funded by Midwest)
- Additional Conveyor System – \$2,000,000 (Funded by Midwest)
- Rail Expansion - \$2,500,000 (Funded by Midwest)
- Locomotive Purchase - \$2,000,000 (Funded by Midwest)



2020 CIP Mid Year Review

One & Two Maritime Plaza; Dr. Martin Luther King, Jr. Plaza

» Completed

- Exterior Restoration Phase 1 OMP- \$172,400 (Funded by Port Authority)
- Exterior Restoration Phase 2 OMP- \$57,300 (Funded by Port Authority)
- Warehouse Roof Replacement MLK - \$51,750 (Funded by Port Authority)

» In Progress

- Warehouse Building Repairs MLK - \$70,000 (Funded by Port Authority)
- Flooring Replacement TMP – \$25,000 (Funded by Port Authority)



2020 CIP Mid Year Review

One Government Center

- » Completed
 - Parking Garage Restoration Phase 1 (\$256,710; Funded by Port Authority)
 - Parking Garage Restoration Phase 2 (\$171,292; Funded by Port Authority)
 - Fountain Restoration (\$10,000; Funded by Port Authority)
- » In Progress
 - HVAC Equipment Control Upgrades (\$100,000; Funded by Port Authority)
 - Security Monitoring Improvements (\$8,000; Funded by Port Authority)



2020 CIP Mid Year Review

Overland Industrial Park

- » Completed
 - 761 Berdan; 250 Castle; 760 Castle Asbestos Abatement - \$275,639 (Funded by City of Toledo & Port Authority)
 - 761 Berdan Demolition - \$157,714 (Funded by Port Authority)
 - Site Cleanup and Grading - \$10,000 (Funded by Port Authority)
- » In Progress
 - All Phase Exterior Storage - \$80,000 (Funded by All Phase)



2020 CIP Mid Year Review

Toledo Executive Airport

» Completed

- New T-Hangar Row C - \$500,000 (Funded by Port Authority)
- Additional Taxilane & Ramp Expansion - \$343,817 (Funded by FAA Grant & Port Authority)
- T-Hangar Signage & Numbering System - \$5,000 (Funded by Port Authority)
- IT Network Expansion & New Self Serve Fuel Kiosk - \$25,000 (Funded by Port Authority)

» In Progress

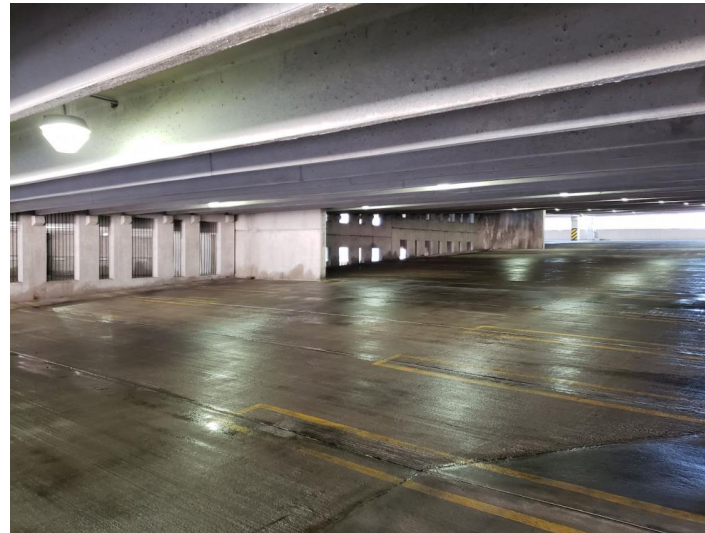
- Reconstruct T-Hangar Row A - \$150,000 (Funded by Port Authority)
- Replace Main Hangar Door - \$100,000 (Funded by Port Authority)



2020 CIP Mid Year Review

Parking Facilities

- » Completed
 - Superior Reconstruction - \$223,093 (Funded by ParkSmart)
 - Camera Equipment Upgrade \$10,000 (Funded by ParkSmart)
- » In Progress
 - Port Lawrence South Elevator Modernization - \$325,000 (Funded by ParkSmart)



2020 CIP Mid Year Review

2021 Outlook

- » Facility 1 Dock Wall Phase 1 - \$6,000,000;
(Funded by Grant)
- » Facility 1 Liquid Bulk Handling Facility -
\$4,000,000 (Funded by Grant)
- » Facility 3 Fly Ash Area Additional Capacity -
\$500,000 (Funded by Grant)
- » 250 & 760 Castle Demolition - \$120,000
(Funded by Port Authority)
- » OMP 2nd Floor Roof Replacement - \$150,000
(Funded by Port Authority)
- » OGC Building VAV Controls Phase 2 - \$500,000
(Funded by Port Authority)
- » ParkSmart North Elevator Modernization -
\$300,000 (Funded by ParkSmart)
- » TDZ Paint Main Hangar \$20,000 -
(Funded by Port Authority)
- » TDZ T Hangar Row B Renovation - \$150,000
(Funded by Port Authority)

Toledo Express Airport

PLANNING, OPERATIONAL & STRATEGIC REVIEW

Toledo Express Airport - Strategic Planning Initiatives

- » Master Planning 101 (RS&H)
- » TOL Master Plan 2008
 - Goal Accomplishment
- » TOL Investments 2008-2020
- » Ongoing Planning Efforts
- » Air Service Development
- » Strategic Vision (6 Pillars)



Master Planning 101

RS&H – TOL Airport Consultants



240+

Aviation Professionals



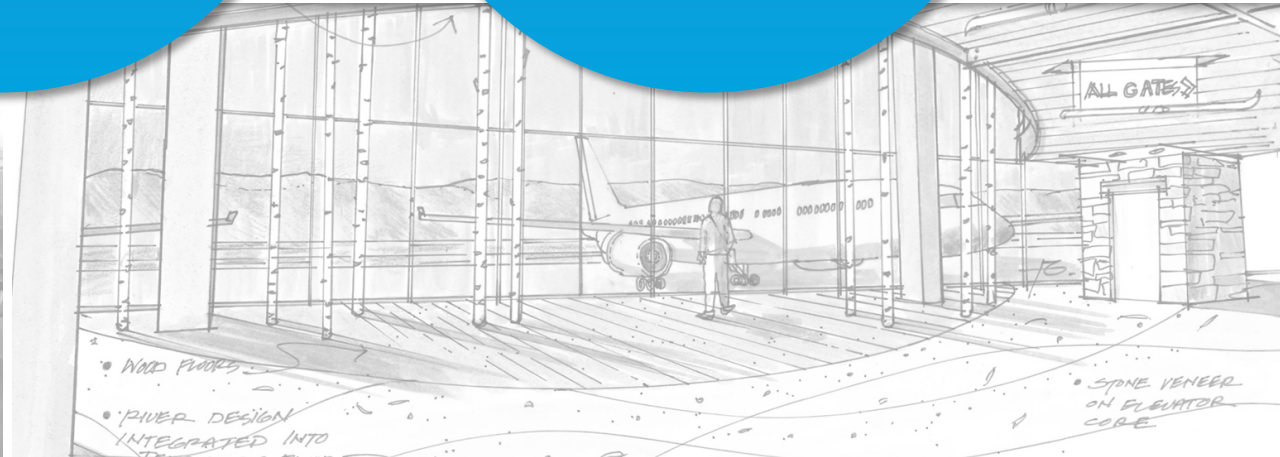
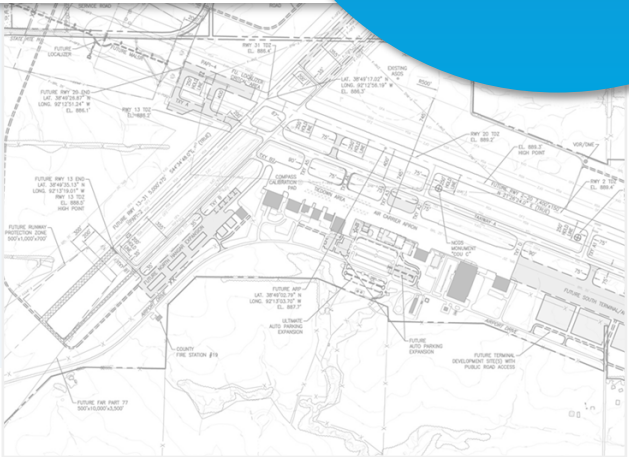
142

Current On-Call
Airport Clients



Full-Service

Aviation Consultant



Planning Experience



Over the last ten years, RS&H has completed:

- 79** Airport Master Plans
- 94** ALP Updates
- 66** Terminal Airport Plans
- 99** Feasibility Studies/
Site Selection/
Land Acquisition
- 17** Safety Management
Systems (SMS)
- 61** Financial/Economic
Analyses
- 47** Community Involvement
Programs

What is an Airport Master Plan?

“An airport master plan is a comprehensive study of an airport and usually describes the short-, medium-, and long-term development plans to meet future aviation demand.”

-FAA Advisory Circular 150/5070-6B Airport Master Plans

What is Purpose of an Airport Master Plan?



A Plan that . . .

Provides guidelines for future development



Satisfies future aviation demand



Is financially feasible

Identifies and responds to environmental and socioeconomic conditions

What are the Goals of an Airport Master Plan?

Maintain or enhance the **safe operation** of the Airport.

Enhance the **efficiency of operations** of the Airport.

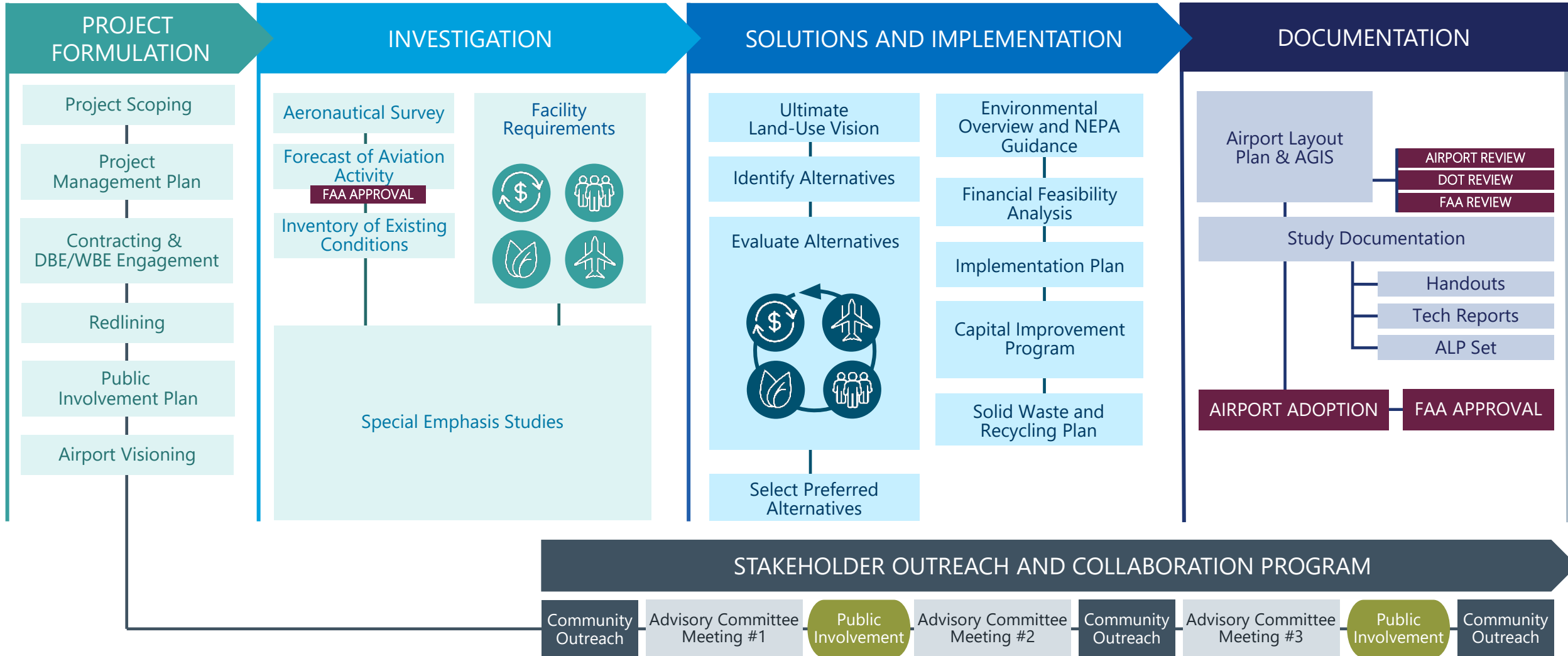
Ensure the Airport is future ready with a detailed understanding of **infrastructure needs**.

Promote the fiscal sustainability of the Airport through progressive **minimum standards, lease agreements, and development standards**.

Engage stakeholders through **open communication**.

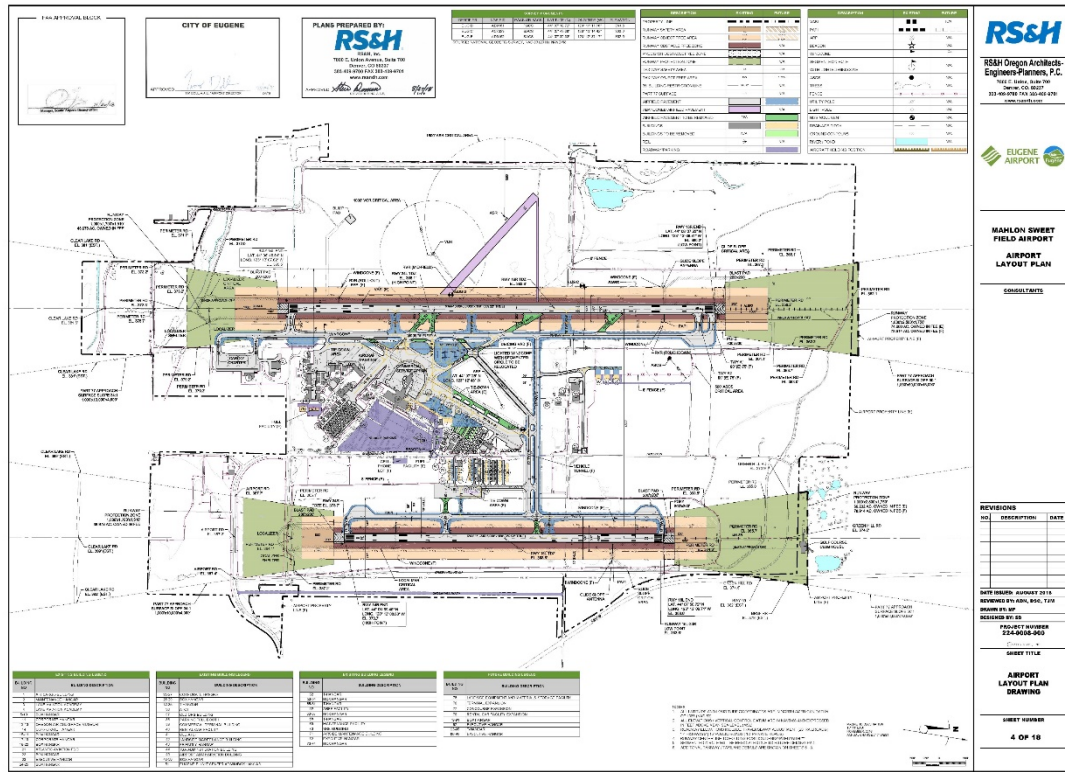
Facilitate Airport development through **strategic CIP planning**.

What is the Planning Process?



What are the Deliverables?

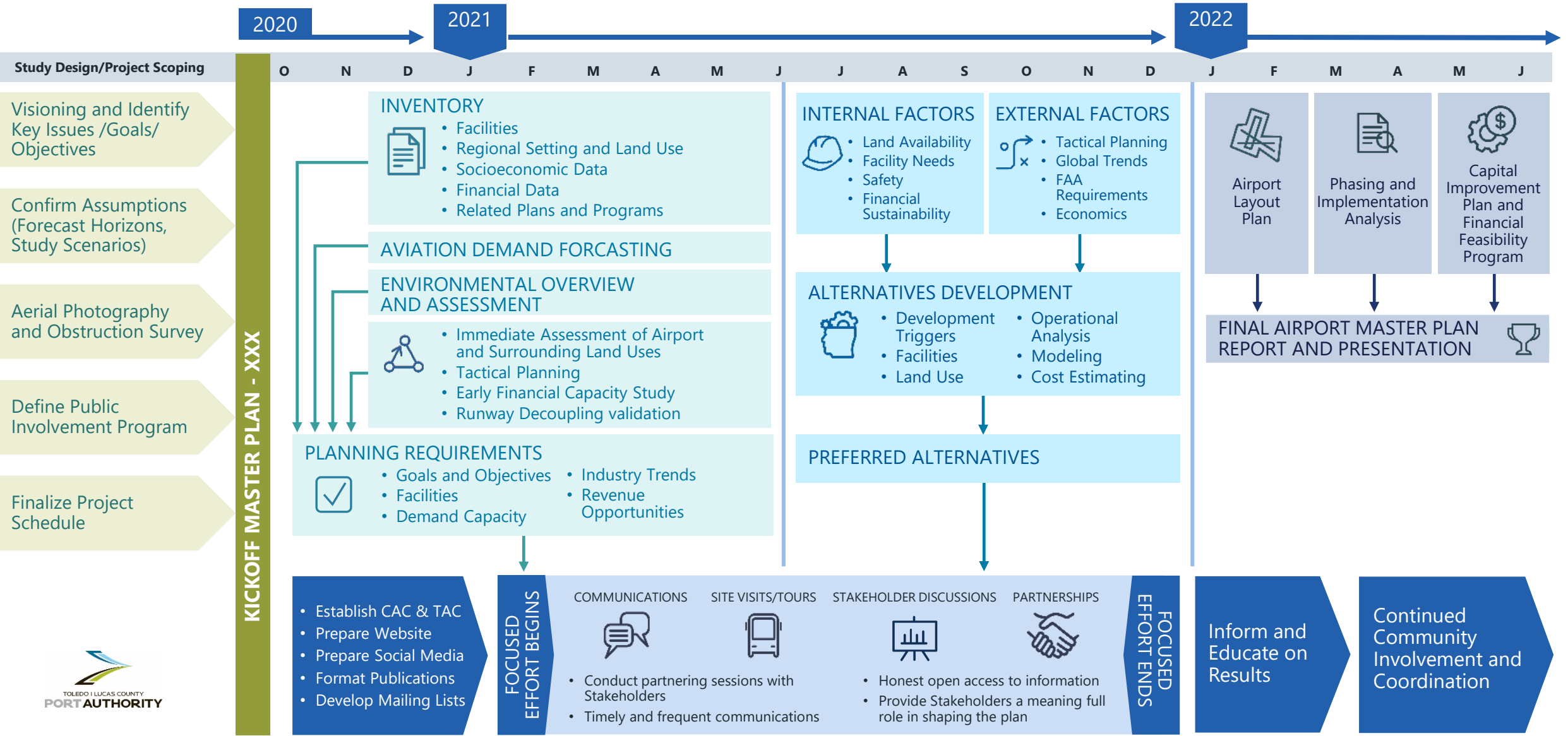
Airport Layout Plan: *(Illustrates the plan)*



Technical Report: *(documents the why and how)*



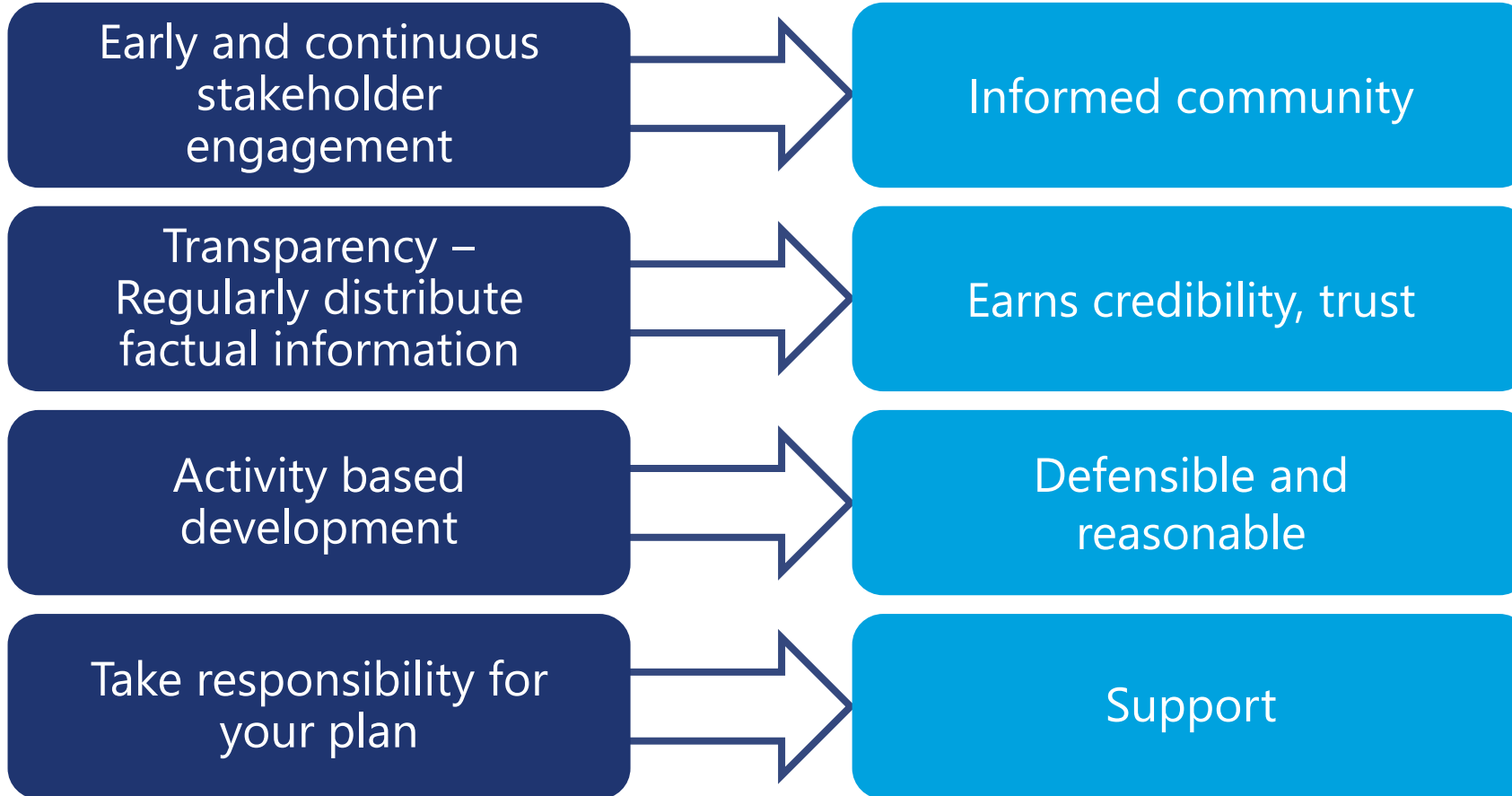
How long could the study take?



How do you Engage the Public?

APPROACH

BENEFIT TO YOU



What are a Few Recent Examples?

Airport Name	Budget	Initial	Completion	Total Months
Pocatello Regional Airport	\$361,589	11/5/2010	6/15/2012	19
North Bend Southwest Oregon Regional Airport	\$283,300	9/2/2011	11/29/2013	26
Anchorage International Airport	4,839,087	6/14/2012	4/30/2015	30*
Casper/Natrona County International Airport	\$692,900	3/1/2013	3/31/2016	30
Telluride Regional Airport	\$440,000	9/1/2014	3/1/2017	31*
Eugene Airport/Mahlon Sweet Field	\$1,301,839	3/1/2016	12/15/2018	33
Grand Rapids International Airport	\$2,866,799	7/8/2016	1/31/2020	41*
Fort Morgan Municipal Airport	\$163,514	8/24/2016	1/15/2019	28
Provo Municipal Airport	\$719,706	9/30/2016	12/12/2019	39
Salt Lake City International Airport	\$4,360,934	6/5/2017	12/31/2020	42*
Centennial Airport	\$665,500	5/15/2018	11/15/2020	30*
Roanoke-Blacksburg Regional Airport	\$1,945,815	8/1/2019	12/31/2020	20*
Cleveland Hopkins International Airport	\$4,500,000	8/30/2019	4/30/2021	20*
San Luis Obispo County Airport	\$1,249,705	7/10/2020	10/8/2021	15*
Range Regional Airport	\$979,770	8/3/2020	8/3/2022	24*

Airport Master Plans within the last 10 years averaged \$1.7M and were completed within

28 months

*FAA review of the airport layout plan resulted in longer project duration.

When Should We Begin a Master Plan?

- » Airport master plans are regularly updated to support maintenance, development, expansion, and modernization of existing airports, as well as to justify construction of additional airports needed to accommodate growth in demand for aviation services.
 - If no prior planning document exists
 - Unanticipated need for facilities or land that are not in the Master Plan
 - Changes in taxiway configurations
 - Significant change in existing facilities deterioration
 - Documentable change in existing aircraft activity
 - Significant changes to the passenger terminal needs
 - Major economic change in the community
 - Need to upgraded facility to support community economic initiatives



2008 Master Plan

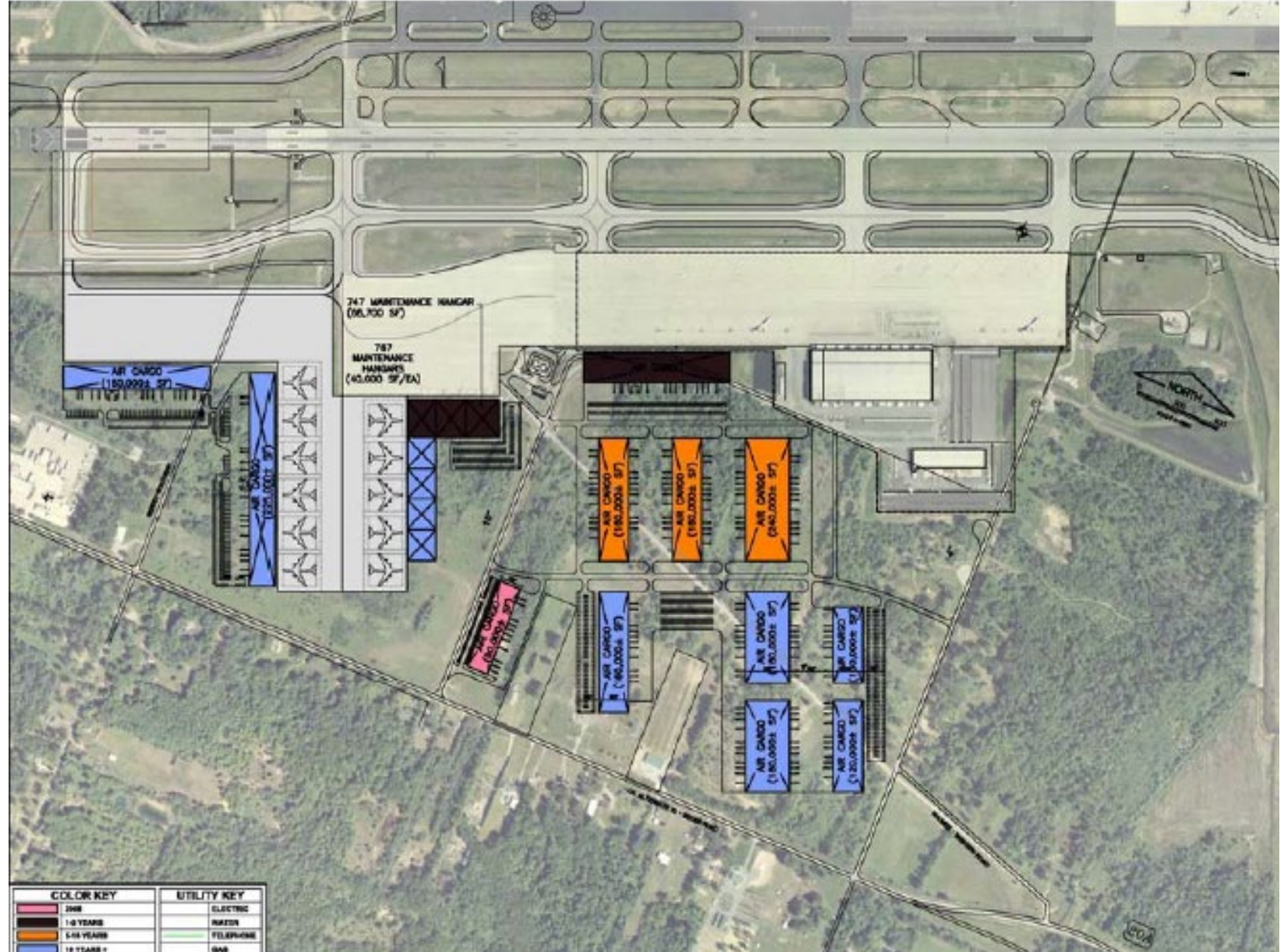
» Development Goals:

1. Extend Runway 7-25 to Increase Capacity
2. Extend Runway 16-34 to Increase Capacity
3. Relocate Taxiway N – *Completed 2012*
4. Relocate Air Traffic Control Tower
5. **Systematic development of an on-airport industrial and commercial business park - *In progress***
6. **Realignment of the south airport access ways to provide the same level of service that currently exists - *In progress***



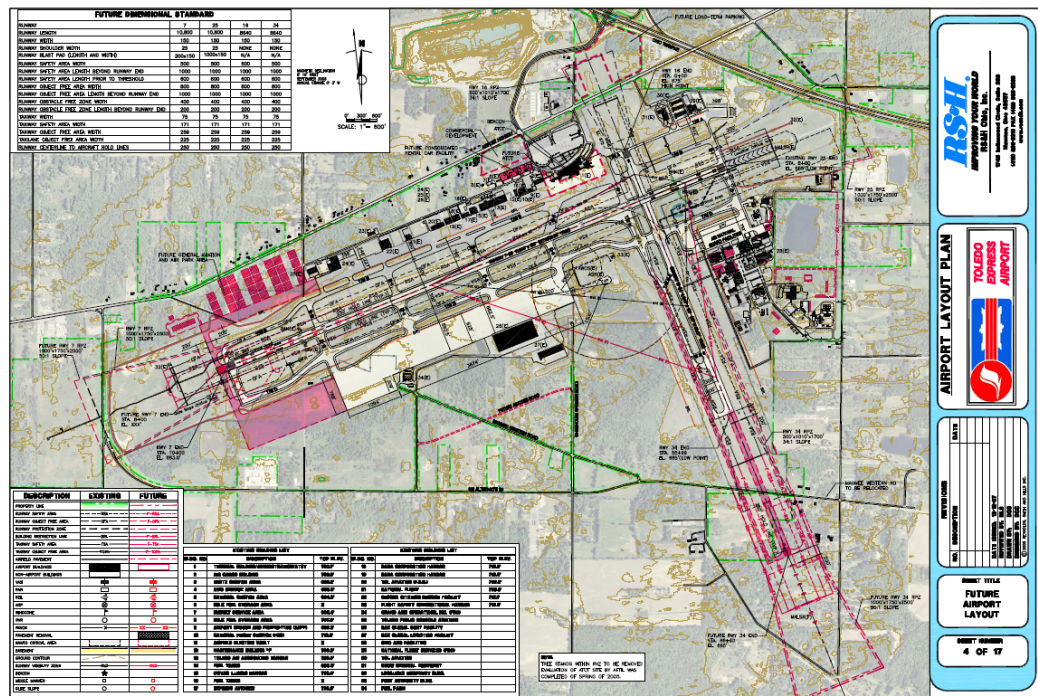
2008 Master Plan

» 2008 Cargo Study and Industrial Park Planning

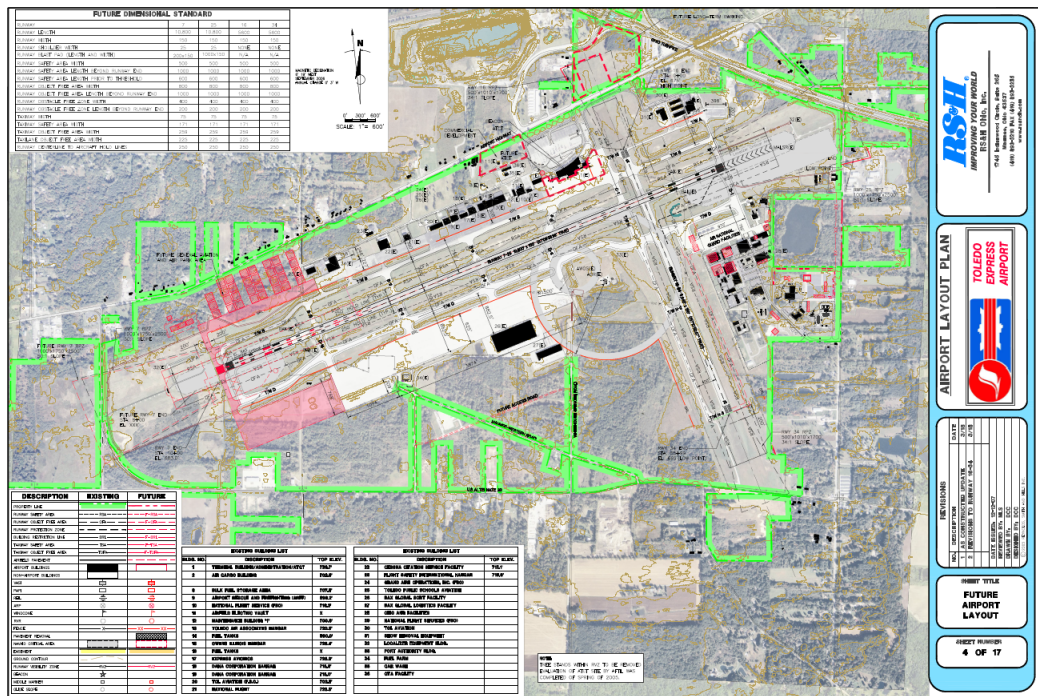


ALP Updates Performed from 2008 to 2018

2008



2018



Investment in Toledo Express Airport – 2008 to 2020

» Master Plan Update 2008

- New ATCT Siting Study
- RW 7-25 Safety Area Improvements – Taxiway C Removal
- Airport Master Plan & ALP Updates
- Rehabilitation of: Runway 7-25, Runway 16-34, Taxiways A, B, D, N, General Aviation Apron, Air Cargo Apron
- Utility Master Plan
- CIP Development and Grant Management Assistance
- Land Releases
- Environmental Compliance Documentation
- Financial Planning Study
- Passenger Facility Charge (PFC) Applications

TOTAL (08' - 20')	FAA SHARE	TLCPA SHARE
\$ 50,896,908	\$ 46,198,073	\$ 4,698,835

FAA Coordination and Grant Management

» October 2019

- TOL/TDZ Planning Meeting

- Attendees: TLCPA, FAA Program Management, FAA Planning, ODOT Office of Aviation, RS&H

» Purpose:

- Consultant Selection Status

- FY2019 Grant Progress

- All Grant Status

- PFC Program Status

- ACIP Review

- *1-5 year Focus*

- *5-10 year Overview*

- Recommendations for FY2020 Project

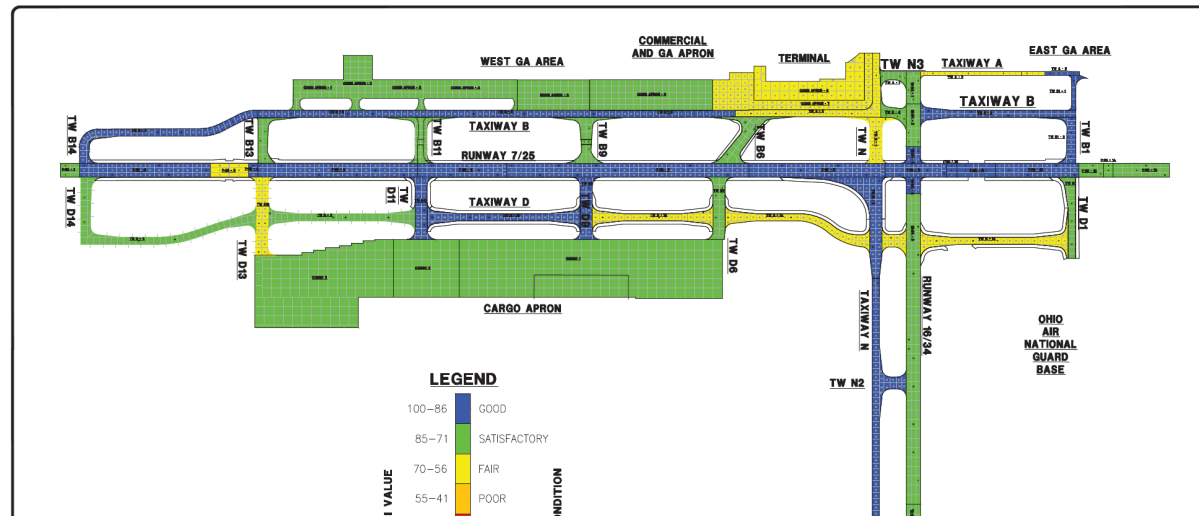
- *ALP Status*

- *Financial Plan*

- *Environmental Review*

- *Plan and Specification Review*

- *Project Description*



ELEVEN YEAR AIRPORT CAPITAL IMPROVEMENT PROGRAM (ACIP) FY-21 TO FY-30 "ATTACHMENT A"												
	AIRPORT NAME:		TOLEDO EXPRESS		STATE:		OHIO		DATE PREPARED:		January 24, 2020	
	ASSOCIATED CITY:		SWANTON, OHIO		NPIAS NUMBER:		390079		PREPARED BY:		TLCPA	
	SPONSOR:		TLCPA		LOCAL IDENTIFICATION:		TOLEDO EXPRESS		TELEPHONE NUMBER:		419.865.2351	
	AIRPORT ID:		KTOL		CONGRESSIONAL DISTRICT:		5th					
Item Number	Project Description	FAA Fiscal Year	Total Cost	Entitlement	Apportionment	Discretionary	State Non-FAA	PFC	Other	Remarks/Item Justification		
2020-1	Rehabilitate Taxiway N - Construct	2020	\$ 1,166,000	\$ 1,049,400			\$ 58,300	\$ 58,300				
2020-2	Rehabilitate Taxiway D Phase 2 - Design/Construct	2020	\$ 7,011,000	\$ 6,309,900		\$ 6,309,900	\$ 701,100					
	Subtotal:		\$ 8,177,000	\$ 7,359,300		\$ 6,309,900	\$ 1,258,400	\$ 759,400				
2021-1	Remove Obstructions - Design/Construct	2021	\$ 920,000	\$ 828,000			\$ 46,000	\$ 46,000				
	Subtotal:		\$ 920,000	\$ 828,000			\$ 46,000	\$ 46,000				
2022-1	Terminal Building Assessment and Evaluation	2022	\$ 360,000	\$ 324,000			\$ 18,000	\$ 18,000				
	Subtotal:		\$ 360,000	\$ 324,000			\$ 18,000	\$ 18,000				
2023-1	Rehabilitate Runway Edge Lighting (LED) - Design/Construct Phase 1	2023	\$ 881,184	\$ 793,066			\$ 44,059	\$ 44,059				
	Subtotal:		\$ 881,184	\$ 793,066			\$ 44,059	\$ 44,059				
2024-1	Rehabilitate Runway Edge Lighting (LED) - Phase 2 Construct	2024	\$ 528,989	\$ 476,090			\$ 26,449	\$ 26,449				
2024-1	Construct Aircraft Rescue and Fire Fighting Building - Design / Construct	2024	\$ 2,500,000	\$ 2,250,000			\$ 36,051	\$ 213,949				
	Subtotal:		\$ 3,028,989	\$ 2,726,090			\$ 62,500	\$ 240,399				
2025-1	Rehabilitate GA Apron - Design	2025	\$ 160,000	\$ 144,000			\$ 8,000		\$ 8,000			
2025-2	Replace Passenger Boarding Bridge - Design / Construct	2025	\$ 1,800,000	\$ 1,440,000			\$ 8,000	\$ 1,800,000	\$ 8,000			
	Subtotal:		\$ 1,960,000	\$ 1,584,000			\$ 8,000	\$ 1,800,000	\$ 8,000			
2026-1	Rehabilitation of GA Apron - Construct	2026	\$ 2,400,000	\$ 2,160,000			\$ 62,500		\$ 177,500			
	Subtotal:		\$ 2,400,000	\$ 2,160,000			\$ 62,500		\$ 177,500			
2027-1	Rehabilitation of Cargo Apron - Design / Construct	2027	\$ 797,000	\$ 717,300			\$ 39,850		\$ 39,850			
	Subtotal:		\$ 797,000	\$ 717,300			\$ 39,850		\$ 39,850			
2028-1	Terminal Passenger Screening Upgrades - Design	2028	\$ 500,000	\$ 450,000			\$ 25,000	\$ 25,000				
	Subtotal:		\$ 500,000	\$ 450,000			\$ 25,000	\$ 25,000				
2029-1	Terminal Passenger Screening Upgrades - Construct	2029	\$ 3,000,000	\$ 2,700,000			\$ 60,000	\$ 240,000				
2029-2	Rwy 7 CAT II-SP Approach Upgrades - Design	2029	\$ 80,000	\$ 72,000			\$ 2,500	\$ 5,500				
2029-3	Rwy 7 CAT II-SP Approach Upgrades - Reimbursable Agreement	2029	\$ 100,000	\$ 90,000			\$ 10,000	\$ 10,000				
	Subtotal:		\$ 3,180,000	\$ 2,862,000			\$ 72,500	\$ 255,500				
2030-1	Rwy 7 CAT II-SP Approach Upgrades - Construct	2030	\$ 1,000,000	\$ 900,000			\$ 50,000	\$ 50,000				
2030-2	Acquire SRE	2030	\$ 500,000	\$ 450,000			\$ 12,500	\$ 37,500				
	Subtotal:		\$ 1,500,000	\$ 1,350,000			\$ 62,500	\$ 87,500				
Total Cost for 10-Year ACIP			\$ 23,704,173	\$ 13,403,856		\$ 6,309,900	\$ 489,209	\$ 3,275,858	\$ 225,350			

FAA Coordination and Grant Management

» October 2019

- TOL/TDZ Planning Meeting

» December 2019

- Land Release – US 20A

» January 2020

- Passenger Facility Charges (PFC)
- Update Meeting TOL/TDZ CIP TOL ODOT Land Release of US 20A
- Airport Capital Improvement Program (ACIP) - Submitted to FAA-ADO

» February 2020

- FFY 2020 Grants – Pre-Applications

» March 2020

- Taxiway D - Final Financial Plan Submitted
- FAA Discussion – Land Release Process, TOL 3rd Runway, Taxiway D Design
- PFC 6 - Amendment 2

» April 2020

- Land Release

» May 2020

- Taxiway D – Design 90% Documents

» June 2020

- PFC 6
- FFY 2020 Grant Application Taxiway N & Taxiway D
- Grant - \$9,841,052 (100% FAA Share – no local match)
 - TWY N portion - \$1,076,946
 - TWY D portion - \$8,764,106
 - Seeking reimbursement for Taxiway D Financial Plan services in FFY 2020 grant application (\$14,855)
 - Seeking reimbursement for Taxiway D Design services in FFY 2020 grant application (\$294,000)

The Federal Fiscal Year October 1 – September 30

- **Oct.**
 - Identify project from CIP for current FY
 - Start developing CIP for future funding years
 - 30th Fourth quarter report due from previous FY
 - 30th Draft environmental documentation due to ADO for current FY project
- **Nov.**
 - Continue developing CIP
- **Dec.**
 - 1st Pre-applications due to the ADO
 - 15th CIPs due to the State
- **Jan.**
 - 30th First quarter report due
- **Feb.**
 - 1st ADO will notify airport sponsor of any financial plan requirements
- **Mar.**

FAA Coordination and Grant Management

» Summer 2020

- Anticipate FAA grant for:
 - *Construct TW N*
 - *Reimburse Design Taxiway D*
 - *Construct Taxiway D*
- Re-Evaluate PFC 7 status and upcoming PFC 8 projects
- Review Terminal Study – Prepare for Fall and End-of-Year Planning
- Close-out TDZ Taxilane Extension

» Late Summer/Fall 2020

- Construction TW N and portion of TW D
- Prep for FAA planning meetings – both TOL & TDZ
- TOL
 - *2021 Remove Obstructions*
 - *2022 Terminal Building assessment and evaluation (discuss with FAA to accelerate)*
 - *2023 RW edge lighting LED upgrades*
- TDZ
 - *2021 RSA Improvements*
 - *2022 RSA Improvements*
 - *2023 Taxilane Rehab*

» Late Fall 2020

- Complete TW N
- Winter shutdown TW D

» Winter 2020-21

- FAA Planning meeting confirmation
- ACIP Submission

The Federal Fiscal Year October 1 – September 30

- **Apr.**
 - 30th Second quarter reports due
 - 30th *discretionary projects only* – environmental documentation due to ADO for following fiscal year projects
- **May**
 - 1st Grant applications due or carryover decision needed
- **June**
- **July**
 - 30th Third quarter report due
- **Aug.**
 - All grants fully executed
 - All close-out submitted to the ADO
- **Sept.**
 - Schedule sponsor meeting for next fiscal year
 - 30th End of Federal fiscal year

Terminal Area Study

- » Terminal Building Assessment and Evaluation
 - Aging Infrastructure
 - 1 Phase of Potential 3 Phase Renovation and Expansion Completed
 - Doorway to Toledo and Northwest Ohio

Exhibit 4-5
TERMINAL BUILDING DEVELOPMENT PLAN, FIRST FLOOR

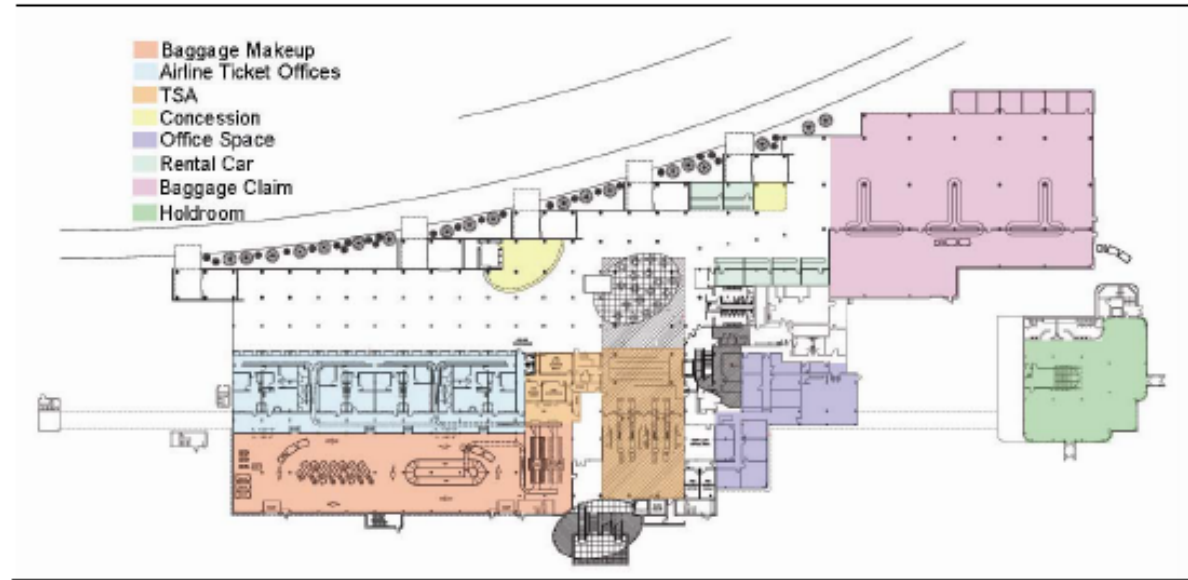
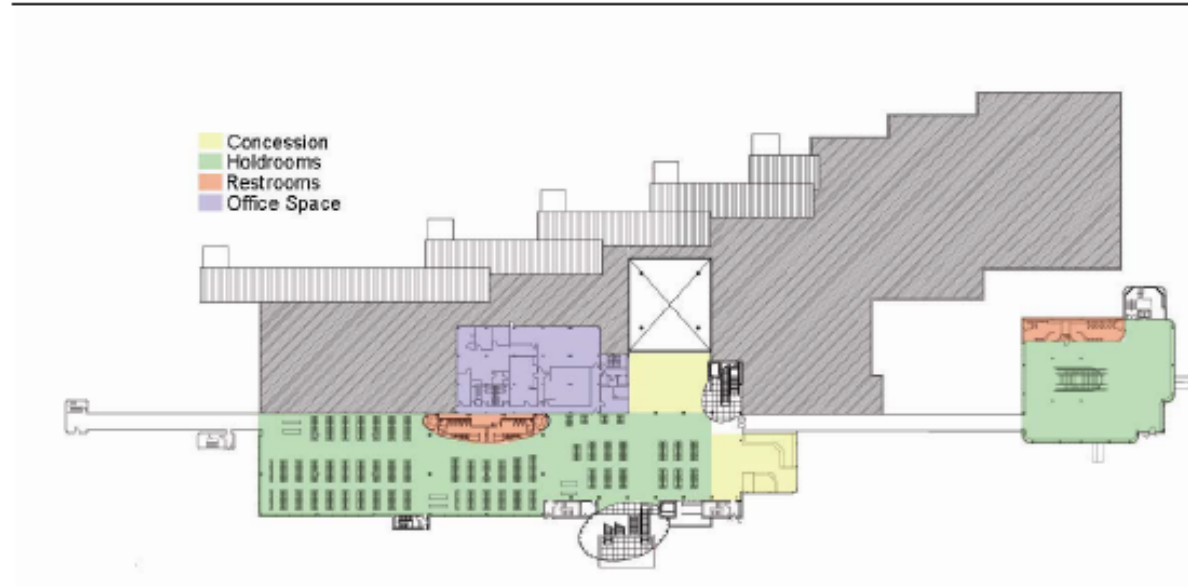


Exhibit 4-6
TERMINAL BUILDING DEVELOPMENT PLAN, SECOND FLOOR



Air Service Development

State of the industry in 2019 and Q1 2020

Healthy Domestic Environment

Pilot Shortages

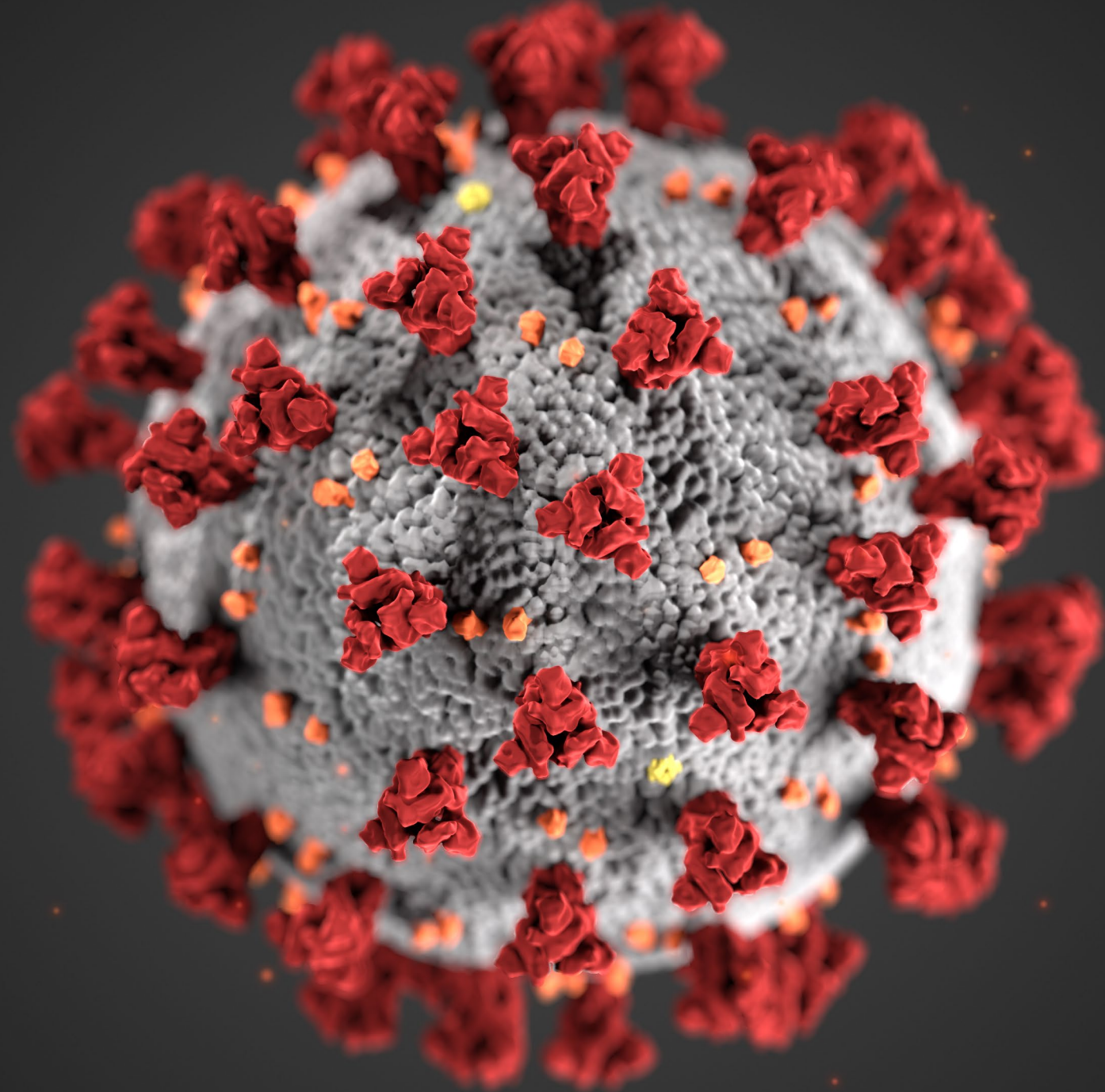
Retirement of 50 Seat Regional Aircraft

737-MAX Grounding

Double Digit Profit Margins

Steady Capacity Growth ~4%

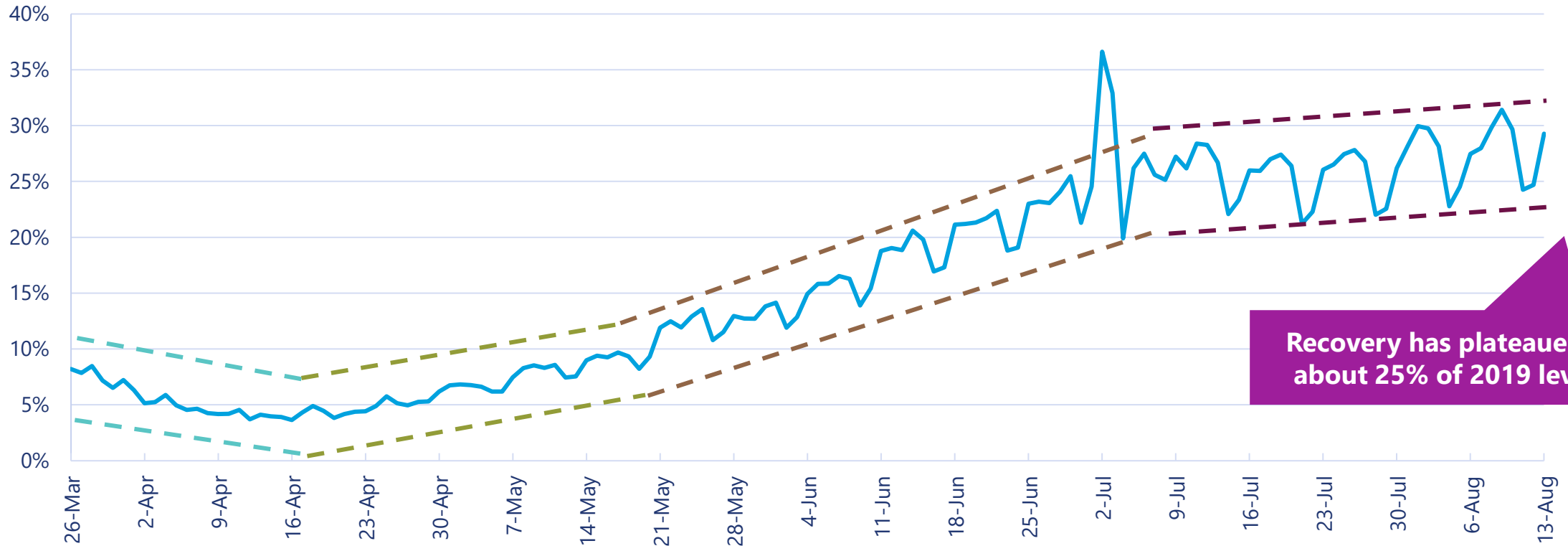




Domestic travel demand remains subdued

DAILY TSA CHECKPOINT TRAVELER NUMBERS, MARCH THROUGH AUGUST 2020

Percentage of same day travel in 2019



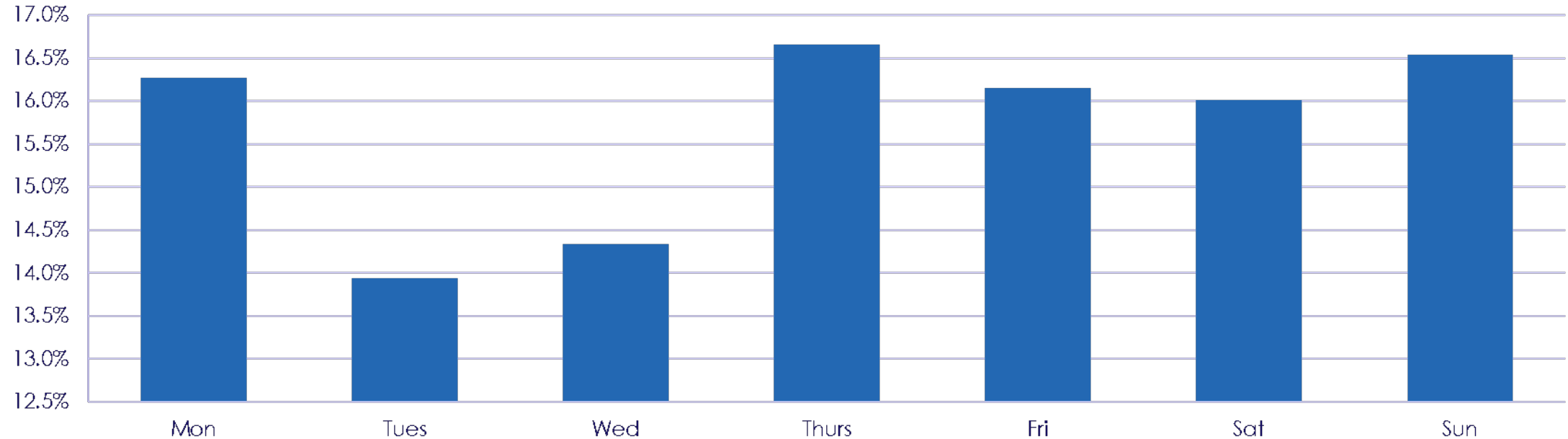
Recovery has plateaued at about 25% of 2019 levels

Source: US Gov't Transportation Security Administration
Ailevon Pacific Aviation Consulting analysis

Business travel continues to be nonexistent

DAILY TSA CHECKPOINT TRAVELER NUMBERS BY DAY OF WEEK, APRIL THROUGH AUGUST 2020

Percentage of 2019 day of week demand



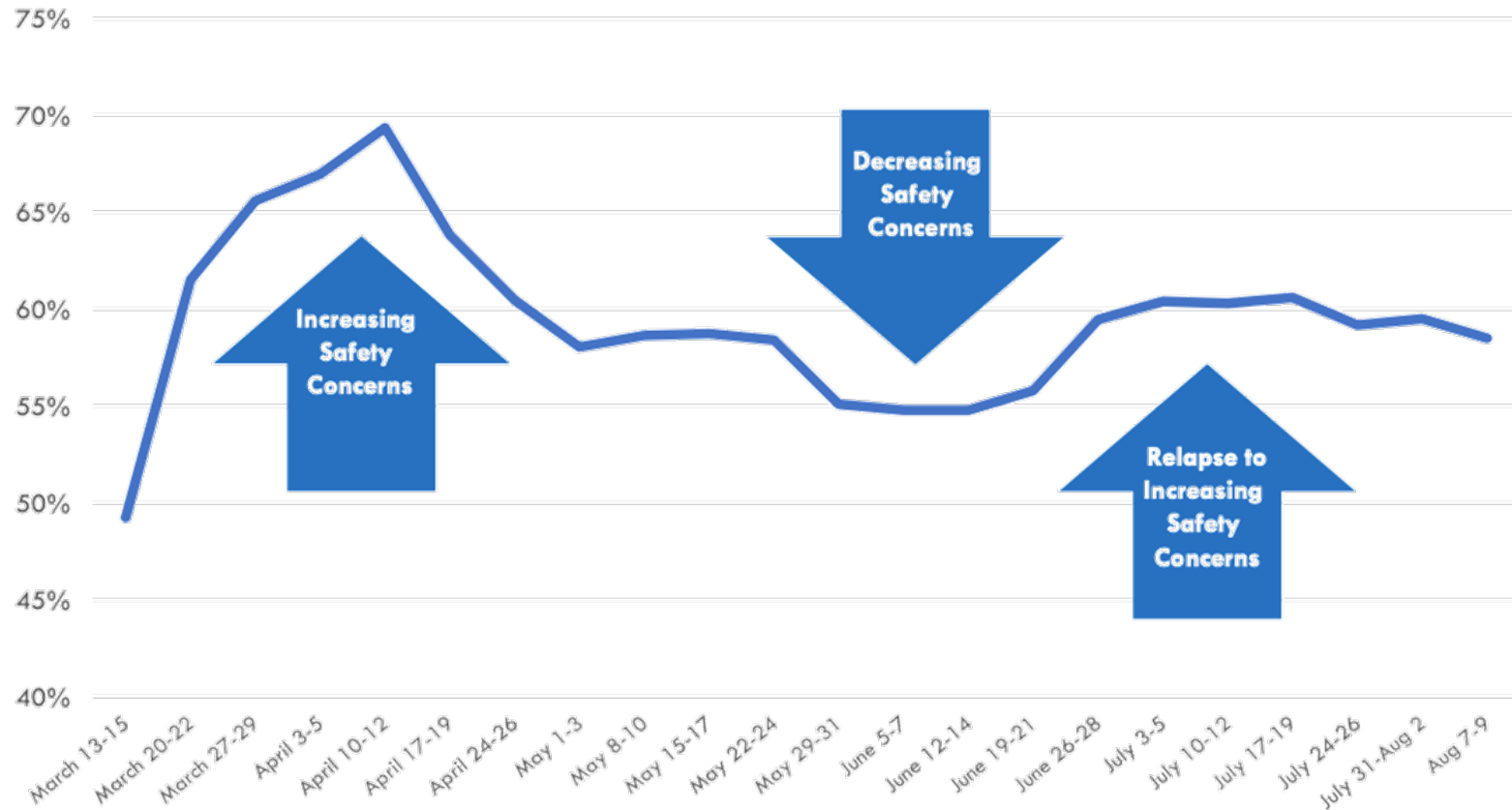
Source: Transportation Security Administration; Ailevon Pacific Aviation Consulting analysis

Traveler morale has fluctuated along with the news

Driven by younger travelers, excitement for near-term travel and openness to travel inspiration returned to levels last seen in early June, and there was a small increase in travel readiness this week. **The overall perception of the safety of travel activities improved slightly, as well.**



PERCENT SELECTING EACH TRAVEL ACTIVITY AS A "SOMEWHAT UNSAFE" OR "VERY UNSAFE"
(average score for all activities tested)

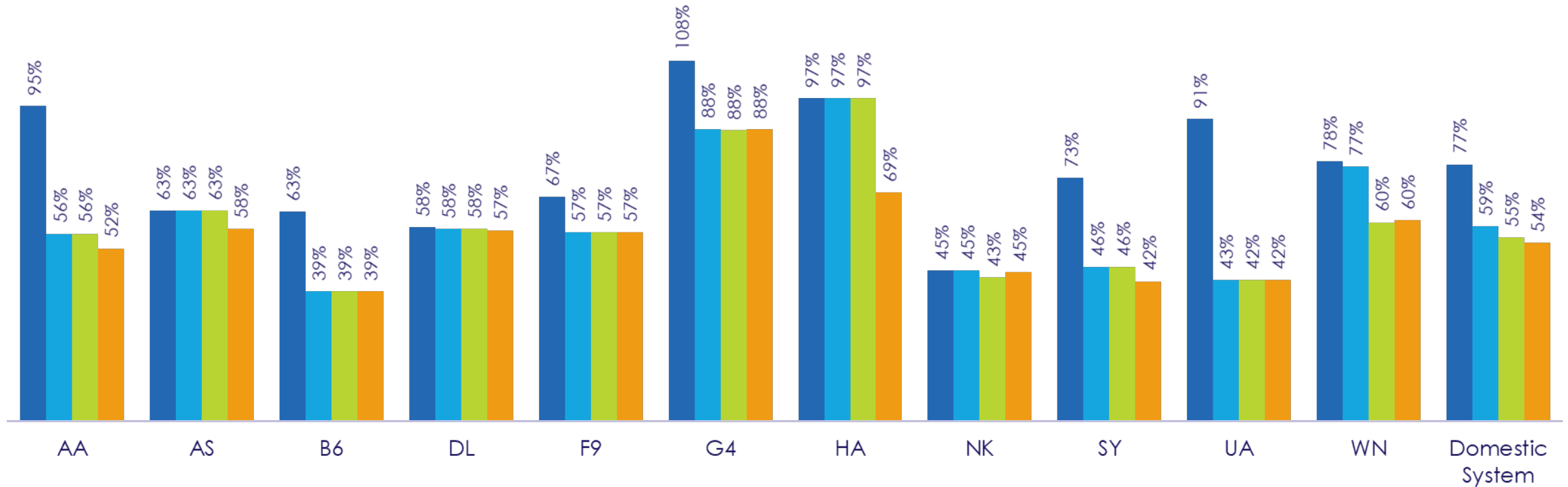


Carriers continue to anticipate lower demand into fall and currently have cut 46% domestic capacity systemwide

SEPTEMBER 2020 DOMESTIC US CAPACITY BY CARRIER AND SCHEDULE LOAD DATE

Monthly seats as a percentage of last year

■ As of 7/24 ■ As of 7/31 ■ As of 8/7/2020 ■ As of 8/14/2020



Note: Does not account for blocked middle seats

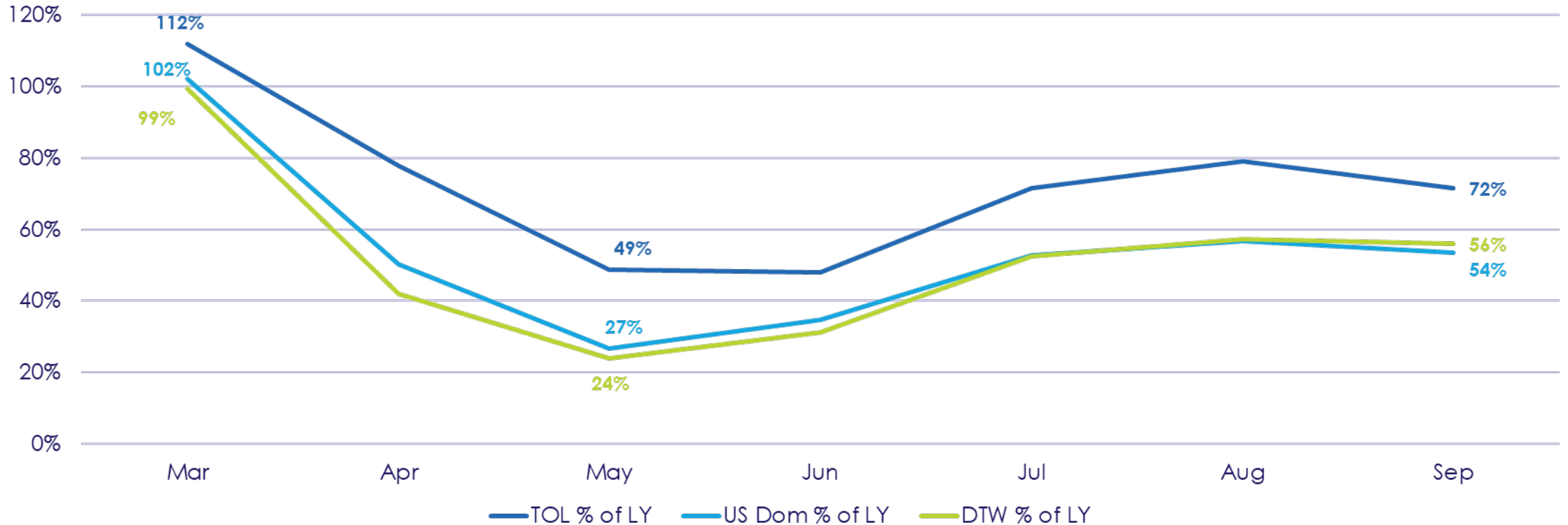
Source: Schedules via Diio Mi

Ailevon Pacific Aviation Consulting analysis

Compared to Detroit and the national domestic system, TOL has fared much better

TOL CAPACITY AS A % OF LAST YEAR VS DTW AND DOMESTIC UNITED STATES

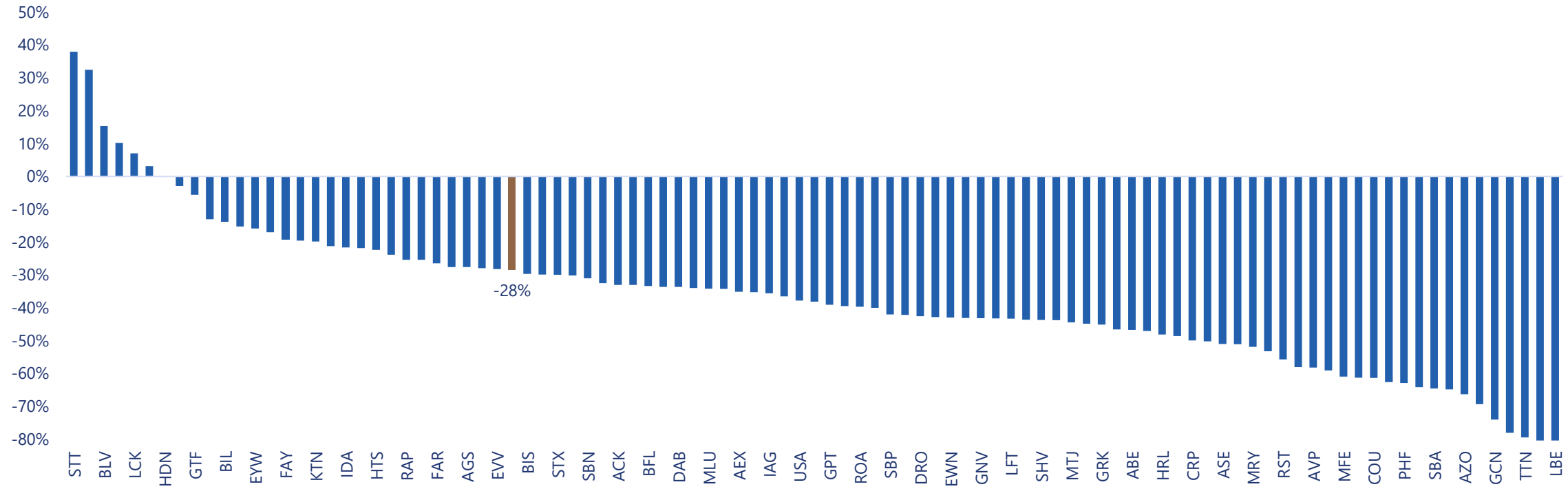
March - September 2020 vs 2019



TOL capacity is down 28% since last August, which is a significantly smaller percentage than majority of peers

TOP 100 - NON HUB SEAT % CHANGE September 2019 vs. September 2020

There are 266 non hub airports:
Evaluated the largest 100

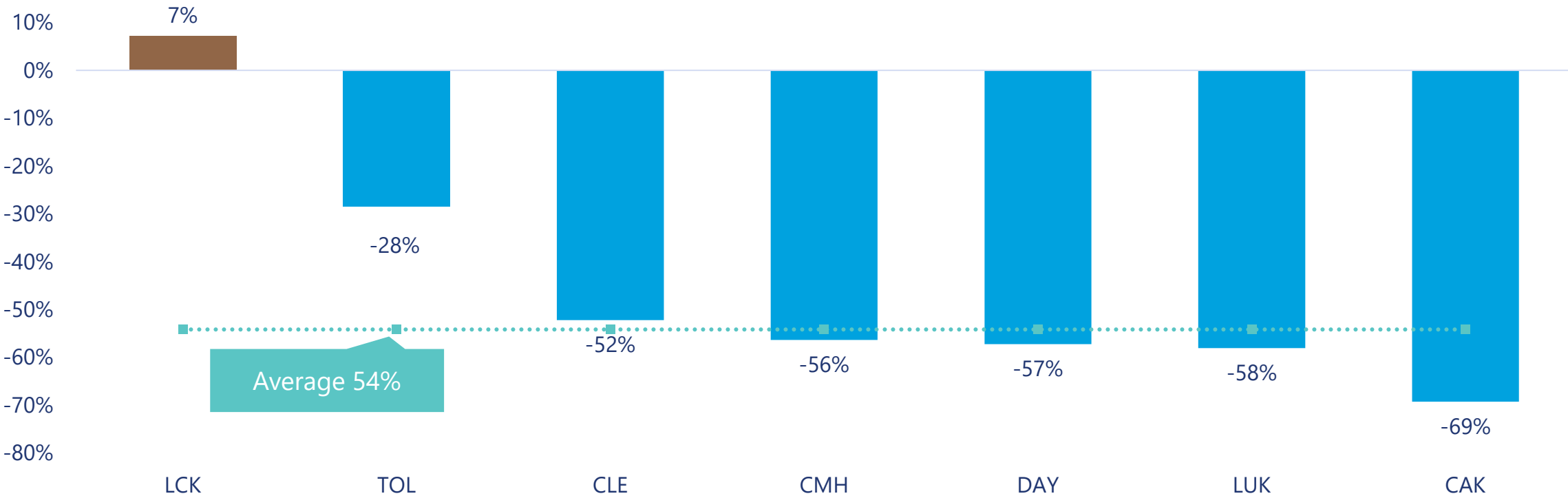


Note 1: Excluded SGU as airport was closed in summer 2019 for runway renovations
Source: DOT via Cirium



TOL has only seen a 28% seat decrease whereas other Ohio airports have seen a 54% seat decrease on average

OHIO AIRPORTS - NON HUB SEAT % CHANGE
September 2019 vs. September 2020

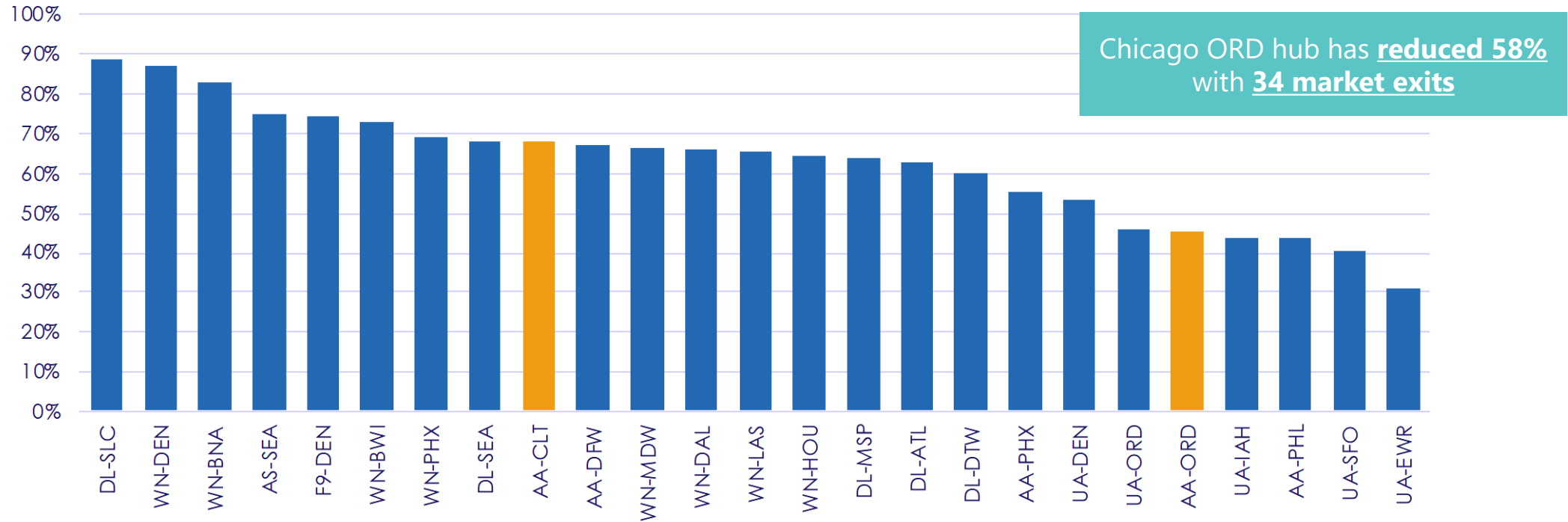


Note 1: Excluded BKL airport
Source: DOT via Cirium

Connectivity to American's Charlotte hub is critical

TEMPERATURE CHECK: US AIRLINE MARKET CAPACITY, SEPTEMBER 2020

Percent, September 2020 vs. September 2019 US domestic seat capacity in Top 25 airline markets*



*Defined as total capacity operated by a single marketing airline at the same airport

Source: DiioMi Schedules as of 15Aug2020; Ailevon Pacific Aviation Consulting

Our recovery strategy includes three phases with different goals

Now (near-term)

- Sent proposal to **Frontier Airlines** for consideration of new winter 2020/2021 markets
- Conducted survey focused on travel sentiment with incentive to stimulate traffic
- Enhanced targeted marketing initiatives utilizing social media, Expedia, and other platforms
- Sent proposal to **Allegiant Airlines** for additional/new winter capacity
- Emphasize the importance of **flying from TOL** to keep demand strong and not lose to DTW

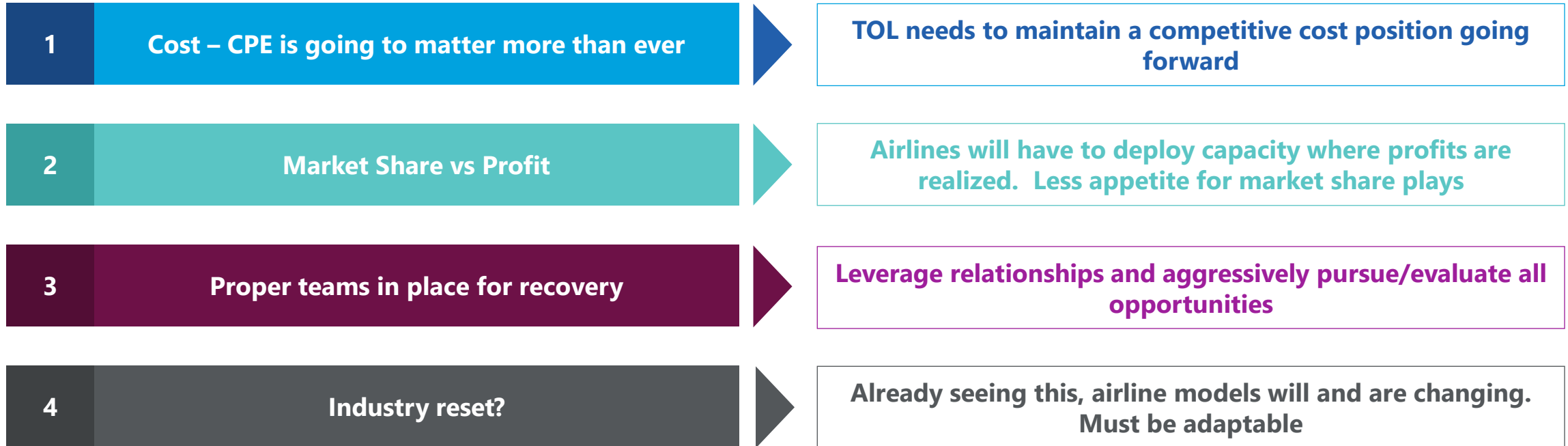
Soon (mid-term)

- TOL airport attending air service development conferences including Ailevon Pacific's Roundtable in September with network planning representatives from **7 airlines**
- Analyze leisure demand from TOL using alternative data sources, and aggressively recruit **new service from ULCCs**

Ongoing (long-term)

- Re-engage with business community to fly TOL.
- Meet (face-to-face or virtually) with network planners to provide information and recruit new legacy carriers and nonstop markets

TOL Value Proposition



The recovery will be slow and uneven. Likely to take years for industry to fully recover.

Strategic Vision (6 Pillars)

- » 1. Continued Capital Improvement Investment
- » 2. Air Service Development
- » 3. Re-establish Cargo Operation
- » 4. Aviation Education & Maintenance Center
- » 5. Supporting Tenants/OANG
- » 6. Facilities Build-Out/Business Expansion



Capital Improvement Projects



Air Service Development



Re-Establish Air Cargo Operations



Aviation Education & Maintenance Center

» Federal Aerospace Institute



» Aerospace and Natural Science Academy of Toledo



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Support Existing Tenants



Facilities Build Out /Business Expansion

