

2020

STRATEGIC ECONOMIC DEVELOPMENT PLAN for South Dade

Miami-Dade County In conjunction with
The South Florida Regional Planning Council &
Economic Development Council of South Miami Dade

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STRATEGY TEAM

U.S. Economic Development Administration

Gregory Vaday, AICP, Economic Development Representative

Miami-Dade County

Mayor Carlos Gimenez

Commissioner Daniella Levine Cava, District 8

Commissioner Dennis C. Moss, District 9 Deputy Mayor B. Jack Osterholt

Jerry Bell, AICP, Regulatory and Economic Resources (RER) Assistant Director for Planning

Manuel Armada, RER Planning Research and Economic Analysis Section, Chief

Mario Morlote, RER Administrative Services Division, Chief Jose Rodriguez, RER, Administrative Services Division

South Florida Regional Planning Council

Isabel Cosio Carballo, MPA, Executive Director

Arlene Davis-Walcott, AICP, Director of Planning and Economic Development

Mark Anthony-Smith, MPA, Regional Planner

Economic Development Council of South Miami-Dade

Lisa Greer, Chair

Rene Infante, Former Chair

Sioux DePass, Secretary/Treasurer

Peter England, Executive Director

Wilbur Bell, Board Member

Baldwyn English, Board Member

Dr. Tania Acosta, Board Member

Lambert Advisory

Paul Lambert, Managing Principal

Diana Gonzalez, Project Manager

Tere Garcia, Bermello Ajamil & Partners, Inc.

Alex David, Calvin, Giordano & Partners, Inc.

Silvia Vargas, Calvin, Giordano & Partners, Inc.

TECHNICAL INPUT

Greater Miami Convention and Visitor's Bureau

William D. Talbert, III, CDME, President & CEO

Rolando Aedo, CDME, Chief Operating Officer

Gisela Marti, Vice President, Marketing and Tourism

The Beacon Council

Michael Finney, President and Chief Executive Officer

James Kohnstamm, Executive Vice President, Economic Development

Jaap Donath, PhD., Senior Vice President, Research and Strategic Planning

Maria Budet, Chief Marketing Officer

PANELISTS & PEER REVIEWER

Steve Scruggs, President, Lakeland Economic Development Council

Thomas DiGiorgio, Jr., Chairman, Pompano Beach Economic Development Council

Dr. Alvin B. Jackson, Jr., City Manager, City of Bunnell

Sandy Pratt, CEcD, FM, Vice President, UNDERPINNED

DISCUSSION GROUP PARTICIPANTS

Agricultural Industry Discussion Group

University of Florida Tropical Research & Education Center

Dr. Edward "Gilly" Evans, Center Director

Carolina Revilla-Vendrame

Fredy H. Ballen

Charles LaPradd, Agricultural Manager, Miami-Dade County

Heather Moehling, Robert is Here

Teresa Olczyk, Cooperative Extension

Tyra Phillips, Dade County Farm Bureau

Margaret Sotham, Baptist Homestead Hospital

Sean McCrackine, Miami-Dade County Commission, District 8

Defense Industry Discussion Group

South Florida Defense Alliance

Rick Miller, Mission Sustainment Working Group Chair

Pam Berkowsky, Sr. Executive Defense Consultant

Rob Polumbo, Sr. Associate Consultant

Retail Industry Discussion Group

Dailen Rodriguez, Dadeland Mall

Carol Cox, The Falls/Prime Marketplace Maggie Anzardo, Southland Mall

Joe Gallaher, NAI Miami

Education Discussion Group

Dr. Lawrence Feldman, Dade County Public Schools, District 9

Tania Acosta, Miami-Dade College

Dwight Bullard, New Florida Majority

Eladia Chavez, Dade County Public Schools

Health Care Industry Discussion Group

Col. Brodes Hartley, President & CEO, Community Health of South Florida

Ken Spell, CEO, Homestead Hospital / Baptist Health

Margaret Sotham, Director, Homestead Hospital / Baptist Health

Michelle Mejia, Asst. Vice President, West Kendall Baptist Hospital

Marketing Industry Discussion Group

The Beacon Council

James Kohnstamm

Maria Budet

Terry Garcia

Cristina Ojeda

Jaap Donath, PhD.

SECTION 1: EXECUTIVE SUMMARY

The South Miami-Dade County (South Dade) economy is incredibly diverse. From South Dade County's urbanized areas surrounding the Metrorail at Dadeland South to the suburban areas of West Kendall to the farms of the Redland, and Biscayne and Everglades National Parks, there is no other area within the South Florida region, which has as much geographic, demographic, cultural, and economic diversity as South Dade. In one respect this is of tremendous benefit given it provides a wide foundation upon which to build an economic base and associated development strategy. In another, it creates a significant economic development challenge. Because the business interests of South Dade are by their nature so diverse there is difficulty in developing and deploying a focused strategy to enhance economic prosperity and resiliency. This Strategic Economic Development Plan for South Dade (Plan) is organized to leverage the economic diversity of South Dade while remaining focused on tangible grounded opportunities to continue diversifying the economy, increase business activity and resiliency, investment, and subsequently, the number of higher paying jobs in the South Dade region.

Between the beginning of the development of the Plan in October of 2019 and the preparation of the Plan document, the global economy has faced one of its biggest threat in over a century as a result of a viral pandemic. In turn, implementing the long-term economic development strategies outlined herein, while central to the long-term

growth of the South Dade economy, will follow the implementation of more immediate, short-term stabilization and recovery strategies to assist businesses and communities recover from COVID-19. As a result, an entire standalone section of this report is devoted to this interim COVID-19 economic stabilization and recovery period. It is expected that once the local economy is stabilized, the longer term economic development strategies outlined within this plan will be as relevant as ever.

This strategic plan is unambiguous in the need to establish a rationally funded Local Economic Development Organization (LEDO) which builds upon the strong foundation of the Economic Development Council of South Miami-Dade (EDC). While the EDC has functioned as the LEDO to date and has many accomplishments to point to in its work, the lack of sufficient and sustained resources has hindered its long-term development into a fully functioning economic development organization. South Dade is home to more than 20% of Miami-Dade County's population or 600,000 people as well as 140,000 workers. A region as distinct in character, development pattern, and industry mix as South Dade will significantly benefit from a coordinating entity whose sole mission is to promote and advocate for implementation of South Dade's economic development strategy. This in turn will benefit Miami-Dade County as South Dade continues to grow and contributes to the larger county and regional economy.

KEY GOALS OF PLAN:

- » Increased Number of Higher Paying Jobs
- » Support Continued Economic Diversification of South Dade with Targeted Strategies for Both Emerging and Traditional Industries
- » Appropriately Fund a South Dade Local Economic Development Organization (LEDO)

STRATEGIC PLAN HISTORY

HOW DID WE GET HERE?

The Strategic Economic Development Plan for South Dade is the culmination of a planning effort which began in 2014 through the Tomorrow's South Dade visioning process. Tomorrow's South Dade brought together hundreds of business community members and residents from across South Dade over several months to envision what the economic future of the region could be. The effort resulted in a concise report which outlined the community's vision for the future of South Dade and its economy.

Following Tomorrow's South Dade the Economic Development Council of South Miami-Dade (EDC), with seed funding from private entities in South Dade and Miami-Dade County, began to formulate a more detailed economic development strategy through the More to Explore working group. Assisted by the International Economic Development Council, community and business partners developed a "Roadmap" to implement the strategy. The Roadmap is included in this Plan as Appendix A.

In 2018, Miami-Dade County, in conjunction with the South Florida Regional Planning Council and the EDC, submitted an application to the U.S. Economic Development Administration to secure funding to prepare a detailed Strategic Economic Development Plan for South Dade in conjunction with the South Dade community. This document is the culmination of the effort and work funded by that grant.

THE PROCESS

DEVELOPING THE STRATEGIC PLAN

The Strategic Economic Development Plan for South Dade is built on information drawn from the South Dade community since 2014 including direct community input, guidance, and information from local businesses and residents, and input from economic development professionals from around the state and country. The Plan has been built on the foundation of an extensive outreach process that included three community meetings, an employer survey of large South Dade businesses, a series of specific industry discussions and reviews through meetings and conference calls, and a literature and data review of nearly every pertinent local plan and study developed for the South Dade region over the past two decades. As part of the preparation of this plan, information gathered from meetings and historic studies was vetted by comparing collected information to hard data to ensure that plan recommendations are supported by market realities; not opinion or stale facts. The Plan is also grounded in the real world experiences of economic development professionals within the State of Florida who shared their expertise and insights regarding what works and does not at a sub-county level and area of diverse economic interests. Finally, the Plan and its findings have been peer reviewed by a representative of the International Economic Development Council which previously issued the economic development roadmap for the area included as an attachment to this report.



TARGETED STRATEGIC PLAN

STRATEGIES & RECOMMENDATIONS

Although population has been a considerable driver of growth in South Dade and will continue to be robust for the foreseeable future, **South Dade is not generating the jobs to support its resident base when compared to other areas of the county.**

While both population and employment densities in South Dade are lower than more urbanized areas of the County, employment **densities in South Dade** when compared to South Dade population exhibits a **particularly large gap when compared to other urban areas of Miami-Dade overall**. Indeed, compared to the County in total, and despite similar age and family size profiles, South Dade has approximately **one-half the number of jobs per resident when compared to the entirety of Miami-Dade County**. This reality is one of the core rationales for a targeted South Dade economic development effort.

As is the case with virtually any successful economic development strategy or effort around the country, a **core focus of the Plan is devising a strategy where the South Dade economic development community focus is on targeted industries or industry clusters which are either well established in South Dade and need to be supported, or are emerging and can be further exploited**. The word “Exploitation” often has negative connotations associated with it. In this particular case, the strategy outlined herein details positive exploitation of private investment to drive creation of **sustainable, healthy, and well-paying jobs for South Dade residents**.

The targeted industries highlighted in this strategy were identified based upon research, interviews, and community input and fall into two groupings or categories: **Emerging Industries and Traditional Industries**.

Emerging Industries include industries such as Health Care, Aviation Maintenance Repair & Overhaul (MRO), Tourism, Professional Services, Logistics, and Insurance. From a South Florida regionwide perspective, these industries are projected to experience significant growth within the foreseeable future. South Dade has participated in the growth of these industries in the recent past.

Traditional Industries include Defense, Agriculture, and Retail for which broad regional growth is expected to be slow, static, or negative when compared to the past. These are major industries and economic engines of South Dade’s economy. Likewise, they are industries which have helped shape the unique character and personality of South Dade.

The strategic plan in Section 4 identifies specific **geographic areas in South Dade which are best suited or most likely to attract and accommodate clusters for each of the industries** so that resources such as **infrastructure improvements, incentives, or tax increment financing** can be **deployed in targeted geographic areas/zones** rather than through a scatter-shot approach. This does not imply that other industries, such as Manufacturing, should be ignored as it relates to supporting their

investment and growth within South Dade, only that the targeted industries are the most likely from a growth and positioning perspective to create the largest amount of employment over the near term.

Additionally, for each of the industries above, this strategy details within Section 6 targeted industry specific actions which should be undertaken to support the growth and health of each of these industries and well as the entities that are best positioned to implement the strategy and each of the action items. These are summarized within a series of matrices in Section 5.

As noted above, this strategic plan is unambiguous in the need to establish a **rationaly funded LEDO which leverages the strong foundation of the EDC**. While the EDC has functioned as the LEDO to date and has many accomplishments to point to in its work, the **lack of sufficient and sustained resources has hindered its long-term development into a fully functioning organization**. The need for a strong South Dade LEDO or reinvigorated EDC became clear from regional stakeholder interviews and the local economic development panel held during Community Meeting 2 on January 31, 2020. A region as distinct in character, development pattern, and industry mix as South Dade will significantly benefit from a coordinating entity whose sole mission is to promote and advocate for implementation of South Dade's economic

development strategy. This in turn will benefit Miami-Dade County as South Dade continues to grow and contribute to the larger county and regional economy.

The **South Dade LEDO, as proposed, is designed to be fully integrated and coordinated with the County, South Dade municipalities, South Florida Regional Planning Council, Beacon Council, and Enterprise Florida in this effort**. The strategic plan outlines an initial budget to stand-up the LEDO with **approximately \$625,000 to \$650,000 annually**. The goal is to be operational by mid-2021 and fully operational by early 2022. The Plan recommends governance by a public/private operating board of business owners and managers who are principally appointed by county and municipal authorities. An advisory board of key organizations and businesses throughout the community are anticipated to be established to further support the EDC Board of Directors. The Plan anticipates the hiring of a full-time executive director for the LEDO.

THE VISION

Based on the multitude of input from South Dade residents and active participants in the varied sessions that have been held, a **Vision Statement for the area** was developed which encapsulates the primary economic development objectives for the region.

A community where people desire to live, work and play; where sustainability is a guiding principle and not an afterthought; where the traditional industries of Agriculture, Defense, Health Care, Tourism, and Retail can be maintained and thrive to the level which the global market allows; and, where establishing the foundation for newly emerging industries becomes a reality by making better use of existing and expanded infrastructure.

ESTABLISHING TANGIBLE GOALS & OBJECTIVES

A rational economic development strategy and plan cannot be complete without tangible goals and objectives against which to measure success. Indeed, as it relates to economic development strategies the **overriding goal is measured in the number of decent paying jobs which are created in economically sustainable and environmentally sensitive industries in the region.** To this end, the plan includes the following goals and objectives:

In the immediate term, a **core objective of the plan is to achieve recovery from the tremendous economic displacement caused by COVID-19, and undertake actions so that employment and business activity in the region can recover to its**

year end-2019 levels by 2023. Worldwide efforts are underway to develop a vaccine for use in the near future that should help speed economic recovery.

For those Emerging Industries or critical area industries detailed within the plan including **Transportation and Warehousing, Finance and Insurance, Professional Services, Health Care and Accommodations and Food Service, the goal by 2027 is to increase the growth in number of jobs by a multiplier of 1.5 times the recent historic ratio of South Dade vs. countywide jobs for a specific industry.**

MEASURING ACHIEVEMENT OF JOB GROWTH GOALS:

Assuming there are **currently 2,000 jobs in South Dade in Industry A which is 20% of the County's 10,000 Industry A jobs; if the County's Industry A jobs grows by an additional 5,000 by 2027, then the goal is that 1,500 of those jobs will be created in South Dade (5,000 new Industry A jobs x 20% historic South Dade fair share of Industry A jobs x 1.5 multiplier goal = 1,500 new Industry A jobs in South Dade)**

For long term historic Target Industries, including Agriculture, Retail and Public Administration (Defense), the goal is to maintain South Dade employment at current levels through 2027.

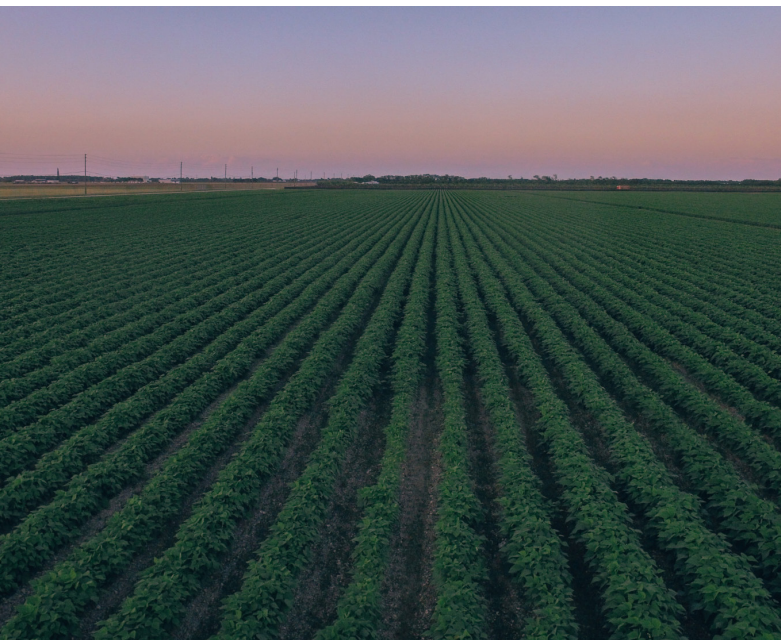
In addition to new job creation, a secondary goal is to grow the ratio of workforce which lives and works in South Dade. Currently, approximately 175,000 residents of South Dade travel outside of the region every day for work. Accommodating a significant percentage of these residents with employment opportunities within South Dade has broad implications for improving mobility and quality of life for residents of the area.

A core goal and objective of this strategy is to promote general wage growth among South Dade workers both through the diversification of industries to traditionally higher wage industries but also by advocating for policies at the county, state, and federal level which allow all workers to achieve a living wage. The economic development strategy for South Dade is oriented to protecting

traditional industries while growing emerging industries which are resilient and friendly to environmental considerations, diversify the economy to create resilience, and promote innovation and high-paying jobs. As an example, industries such as Aviation MRO, which may appear to be carbon unfriendly, is an industry oriented today to integrating new technology into planes so that they are more fuel efficient and have the suite of avionics which will enable them to participate in significantly advanced routing which in turn reduces carbon emissions.

Finally, a core goal of the strategy is to support small business creation and enhance the 24-month survival milestone which research indicates is an important threshold for small businesses to be self-sustaining. This includes businesses that build or leverage emerging technology, which due to the nature of their business are more likely to not be as geographically constrained as in the past. A silver lining from the current pandemic has been the increased willingness of companies of all sizes to allow their workforce to work remotely rather than requiring them to work in traditional office space or campuses. Many of the largest tech companies have given workers at least until the end of 2021 to work from wherever they are. South Dade, which provides a range of housing choice, a high quality of life, proximity to urban amenities, and one of the nation's most important international hub airports, Miami International Airport, could be expected to benefit from any fundamental shift in the nature/location of work which may occur as the global economy emerges from the COVID-19 emergency.

Utilizing the REMI input/output model platform Miami-Dade County measured the relative economic and fiscal benefits of realizing enhanced job growth in targeted industries which could result from a South Dade targeted economic



development effort. The growth was measured against a historic baseline and is indicative of what a modest target investment translates into as it relates to economic gain for Miami-Dade County. In sum, the model provides clear justification for investing in a smart and targeted regional economic development strategy. The model indicates that total marginal employment growth between 2020 and 2027 in the region (including direct, indirect and induced) ranges from a total of 4,187 new jobs under a minimum impact

scenario to nearly 17,000 additional jobs under a maximum impact scenario. Likewise, as it relates to fiscal impacts to Miami-Dade County and the South Dade region's municipalities, it is estimated that under a minimum scenario the marginal fiscal benefit could be as much as \$14 million per year and \$46 million under a maximum scenario. A well formulated and ultimately successful economic development strategy which grows economic investment and jobs is a wise investment by any measure.



STRUCTURE OF PLAN THAT FOLLOWS

Beyond this Executive Summary, the remainder of this Plan is broken down into seven additional sections as follows:

SECTION 2

Details the near-term economic response associated with the COVID-19 crisis.

SECTION 3

Is the Economic Background to the Market which provides the fundamental data that serves as the underpinnings of the Plan.

SECTION 4

Is an evaluation of the opportunity sites and recommendations for the strongest locations within South Dade where industry should and can be developed.

SECTION 5

Addresses the core plan vision, SWOT, goals, and associated strategies for implementation.

SECTION 6

Provides an overview and strategy description/matrix associated with implementation for each emerging and target industry.

SECTION 7

Is an outline of a Marketing Strategy for South Dade.

SECTION 8

Addresses the implications of sea level rise and climate change on future economy of South Dade.

The plan is supported by a range of appendices which provide additional information that inform and support the future implementation of the Strategic Plan including but not limited to a detailed summary of a literature review which was completed as part of the plan and helped guide the foundation for the plan.

SECTION 2

COVID-19 RESPONSE

During the course of developing this strategic plan, the COVID-19 pandemic hit South Dade along with the rest of Miami-Dade County, Florida, and the world. While the core recommendations of the plan certainly are valid as it relates to building the economy of South Dade over the longer term, due to the sweeping economic impact of the pandemic and the uncertainty of how long the impact will persist, we have identified a set of strategies developed to address this immediate challenge.

Over the past 30 years, South Dade has proven to be very resilient to natural disasters and public policy decisions which had a major negative economic impact on South Dade for a period of time. These include Hurricane Andrew, a 1993 Base Realignment and Closure that downsized Homestead Air Force Base, the North American Free Trade Agreement (NAFTA) which changed the face of agriculture, 9/11 which impacted tourism, the 2008 mortgage collapse which impacted the real estate market, and Hurricane Irma in 2017. Faced with each of these economic challenges, South Dade was able

to look to Miami-Dade County, the State of Florida, and the Federal government to seek needed financial and organizational assistance. However, COVID-19 has impacted economies at every level, thus highlighting the need for a specific strategy with strong local leadership.

Possibly, the only positive aspects of the pandemic are the reduction in traffic, air pollution and impact on the natural environment that has been seen due to the increase in people working from home. The need to work from home has forced us to maximize available technology to hold online meetings in an effort to continue business operations. Eventually, this **may lead to individuals continuing to work at home, reducing the number of people in South Dade who currently commute north daily**. Nationally, projections range from 12 to 20 percent as to the potential reduction in demand for commercial space as a result of people working at home. This will benefit what is a significant bedroom community for other job centers in the County.

Notwithstanding the long-term realignment in how people work, the impact of the pandemic is especially concerning to South Dade given that employment in Miami-Dade, as in the South Florida region, is largely driven by small businesses. Nearly **92 percent of total businesses in Miami-Dade County have less than 20 employees** and this is particularly the case for South Dade where even the 50th largest employer, as measured by number of employees, in the region has less than 200 workers.



Figure 1: Employment by Firm Size; Miami-Dade County

Source: U.S. Department of Commerce; BEA

The Board of County Commissioners, at the request of Commissioner Joe Martinez, established the COVID-19 Economic Recovery Task Force. The purpose of this task force is to advise the County Commission on issues related to an economic recovery in the County in the aftermath of COVID-19, including but not limited to identifying resources, such as grants, loans, and other financial assistance available to businesses in Miami-Dade County; the establishment of public outreach and information programs; and recommendations regarding possible Board actions that would aid with such economic recovery. As part of the duties, the Task Force shall review any relevant data, studies, assessments, reports, and evaluations relating to the economic

impact of COVID-19 in Miami-Dade County and may hear additional presentations and comments from relevant stakeholders and members of the public. Consistent with the purpose of the Task Force, it shall prepare a written report with information and recommendations to the Board of County Commissioners including, information regarding available resources, for communicating such information to the public, and for possible Board actions that would aid with such economic recovery.

The Task Force is composed of local individuals appointed by the Board of County Commissioners and includes three members representing the South Dade area that is the subject of this report. The Task Force has established three Working Groups that cover the subject areas of Marketing/Outreach, Industry/Small Business, and New Normal Guidelines/Needs Assessment. The working groups have put forward a series of recommendations that have been presented to the Board of County Commissioners and are in the process of distributing a COVID-19 Needs Assessment to businesses to determine the economic impact of COVID-19.

Specific impacts from the pandemic to economic activity in the region include the following:

- » The pandemic is severely impacting **Tourism, Retail, Agriculture and Healthcare – industries that represent the core South Dade’s traditional economy** and, with the exception of Retail and Agriculture, had been projected to be areas of employment growth for South Dade.
- » Prior to the pandemic, **Accommodation and Food Services employment was slated to grow by 8.5% over the next 8 years** in Miami-Dade County, yet this growth may be thwarted by a potential trend for restaurants to close altogether or remain in a takeout only mode. Hotels are also likely to feel the lingering impact of the drop in travel.
- » As it relates to Agriculture and Retail, the pandemic has demonstrated how agriculture needs to be better connected to countywide supply chains and economic efforts. Miami-Dade County recently allocated \$900,000 to local food banks to purchase local agricultural product for distribution to people in need. The pandemic will also almost certainly accelerate the projected reduction in retail employment.
- » The impact on healthcare will depend on the availability of Federal funding to make up for loss of revenues from elective medical procedures and the increase in expenditures for protective equipment and providing services to uninsured patients.
- » Local governments continue to lose revenue due to reduction in sales tax revenue, other use taxes and reduced transit use. Miami-Dade County is projecting a loss in revenue of approximately \$300M over the next year. Real estate foreclosures and reduced demand for commercial real estate due, in part to the projected contraction in retail, are slated to increase over the coming months. These events will also have an impact on local governmental revenues.

RECOMMENDED COVID-19 NEAR TERM STRATEGIES

Miami-Dade County has established a countywide COVID-19 Economic Recovery Task Force which includes representation from South Dade. The Task Force is focusing on small business and industry, marketing and outreach, and new normal guidelines. These working groups are also reaching out to the municipalities in an effort to distribute all information and efforts countywide. However, South Dade leaders and residents should make a concerted effort to ensure that its unique needs are incorporated into the broader countywide COVID-19 recovery effort.

In light of the economic disruption specific to South Dade, expected to last beyond the lifting of the current restrictions, and the unique nature of South Dade major industries in comparison to the County as a whole, there are two immediate strategies which the County and its municipal partners should deploy.

Strategy 1

The Economic Development Council of South Miami-Dade, in its effective role as the current LEDO that continues to be referred to in this Plan, should start convening, in partnership with the cities in South Dade and Miami-Dade County, a South Dade COVID-19 Recovery Working Group. The core participants should include the major economic development entities/employers in the area including:

- » Miami-Dade County
- » Five South Dade Municipalities (Pinecrest, Palmetto Bay, Cutler Bay, Homestead, and Florida City)

- » Greater Miami Convention and Visitor's Bureau
- » The Beacon Council Chamber South Dade Chamber of Commerce
- » Local Banks
- » Miami-Dade College Baptist Hospital
- » Community Health, Inc.
- » Dade County Farm Bureau
- » Florida Power & Light (FPL); and,
- » University of Florida Tropical Research and Education Center (TREC)
- » Homestead Airforce Base
- » Miami-Dade County Public Schools
- » South Florida Regional Planning Council

The goals of the COVID-19 Working Group should include:

- » Assessing the state of the South Dade economy post COVID-19;
- » Identify specific tactics for assistance to local business;
- » Develop a program that focuses specifically on micro-businesses (firms that employ up to 20 employees); and,
- » Identify economic development policies that help to replace jobs/industries lost in South Dade economy as the result of the closing of businesses which are unlikely to survive after the pandemic.

Strategy 2

Miami-Dade County should file an application for EDA funding specifically to fund South Dade economic recovery implementation.

Indeed, this plan is funded through the U.S. Economic Development Administration's disaster relief funding program that resulted from Hurricane Irma in 2017 and is being developed in the midst of what is the greatest economic disruption since the Great Depression.

As the South Dade community recovers from COVID-19, it should again look to the EDA in its mandated role to serve as a vehicle for enhancing federal interagency coordination, information sharing, communication, and collaboration in both the pre- and post-disaster timeframes. The EDA stated goal of supporting the capacity of local, state, tribal, and territorial governments, nonprofits, and the private sector to produce a multi-dimensional strategy capable of supporting economic recovery and enhancing community resilience is entirely aligned with the current needs of the region.

As the community convener for economic development issues in South Dade, the Local Economic Development Organization (LEDO), will have critical role in the effort to recover from any form of economic disaster.

The LEDO can bring the community together to benefit from programs that are available at the federal, state, and local levels to bring much needed information to local businesses and potentially, work with governmental agencies to implement disaster recovery programs.

Through the development of this plan, the County has established a relationship with EDA. This relationship must be maintained and nurtured to remain current with the latest economic recovery information.

SECTION 3

BACKGROUND TO THE MARKET

Different people perceive the boundaries of South Dade in different ways, but for purposes of this Plan, “South Dade” has been defined as the entire Miami-Dade jurisdictional area south of Southwest 88th Street (Kendall Drive). South Dade contains five municipalities although the vast majority of land area is within unincorporated Miami-Dade County. Likewise, a substantial portion of the planning area is outside of the Urban Development Boundary (UDB) and is designated as “Agriculture” on the Land Use map. The Land Use Element of the Comprehensive Development Master Plan states that principal land uses in this area should be agriculture, uses ancillary to and directly supportive of agriculture, and residential uses at a maximum density of one dwelling unit per five acres.

The Strategic Planning Area and Urban Development Boundary are shown in Figure 2.

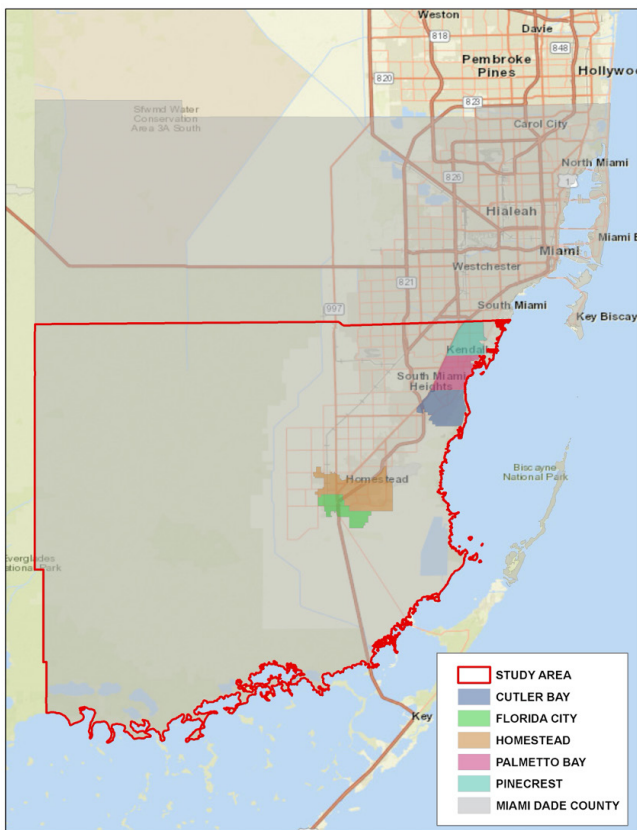


Figure 2: South Dade Strategic Planning Area

DEMOGRAPHIC SNAPSHOT

Who lives in South Dade is important to its current and future economic activity. Key highlights of demographic conditions related to the future of economic development include the following:

- » South Dade comprises just over 1/5 of Miami-Dade County’s population;
- » Incorporated areas in South Dade account for less than 1/3 of South Dade’s population;
- » Median household incomes in South Dade are nearly 25% above that of the County’s although the region has great variability in incomes by neighborhood; and
- » Nearly 2/3 of housing units are occupied by owners.

South Dade also has been one of the most rapidly growing areas of the County as it relates to population.

	Total Planning Area	Cutler Bay	Florida City	Homestead	Palmetto Bay	Pinecrest	Miami Dade
Total Population 2017	596,439	44,721	12,149	67,354	24,679	19,441	2,664,418
2010 Population	528,062	40,286	11,245	60,512	23,410	18,223	2,496,435
2000 Population	439,347	NA	7,843	31,909	NA	19,055	2,253,362
Median Household Income 2017	\$65,143	\$70,473	\$34,545	\$43,150	\$107,612	\$152,643	\$52,990
% Above \$50,000 2017	56.5%	68.0%	47.2%	42.4%	76.4%	78.4%	45.2%
% Owner Households 2017	63.7%	70.7%	26.2%	39.2%	85.2%	77.0%	52.6%
% Renter Households 2017	36.3%	29.3%	73.8%	60.8%	14.8%	23.0%	47.3%

Figure 3: South Dade Demographic Snapshot as of 2017 (year latest figures are available for)
 Source: 2000 & 2010 from Decennial Census; 2017 from Census' American Community Survey

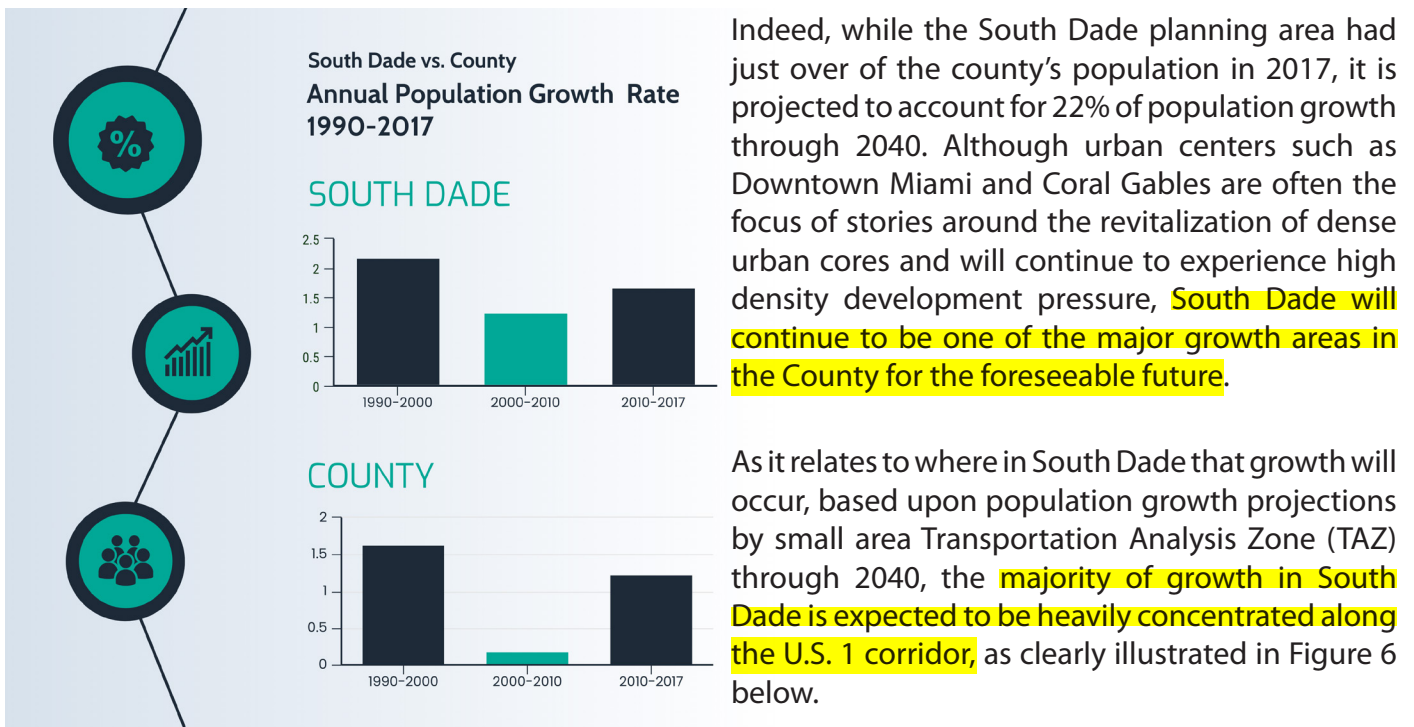


Figure 4: South Dade vs. County Annual Population Growth Rate 1990-2017

	POPULATION CENSUS				
	1990	2000	2010	2017	PROJECTIONS
South Dade	354,012	439,347	528,062	596,439	780,497
All Miami-Dade	1,914,672	2,253,362	2,496,435	2,664,418	3,102,138

	AVERAGE ANNUAL GROWTH				
	1990	2000	2010	2017	PROJECTIONS
South Dade	-	8,534	8,872	9,768	8,415
All Miami-Dade	-	33,869	24,307	23,998	20,190

	POPULATION ANNUAL % GROWTH				
	1990	2000	2010	2017	PROJECTIONS
South Dade	-	2.18%	1.86%	1.75%	1.31%
All Miami-Dade	-	1.64%	1.03%	0.93%	0.73%

Figure 5: South Dade in comparison to Miami-Dade County Population Growth Historic and Projected 2040 Source: Miami Dade TPO

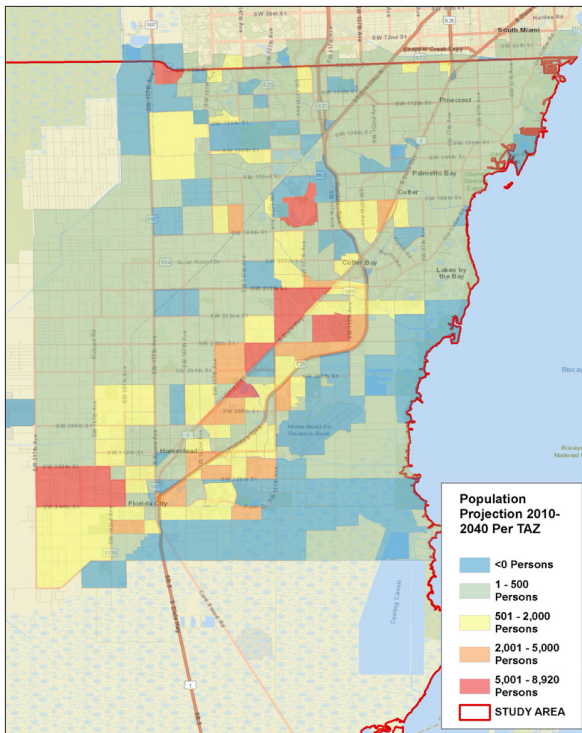


Figure 6: South Dade Population Growth Projections by TAZ
Source: Miami-Dade Transportation Planning Organization

Although population growth has been a considerable driver of growth and will continue to be robust for the foreseeable future, **South Dade is not generating the jobs to support its resident base when compared to other areas of the county.**

While both **population and employment densities in South Dade are lower than more urbanized areas of the County**, employment densities in South Dade when compared to South Dade population has a particularly large gap when compared to other urban areas of the County as the following map in Figure 7 indicates. Indeed, compared to the County overall, and despite similar age and family size profiles, **South Dade has approximately 1/2 the number of jobs per resident when compared to the entirety of Miami-Dade County.**

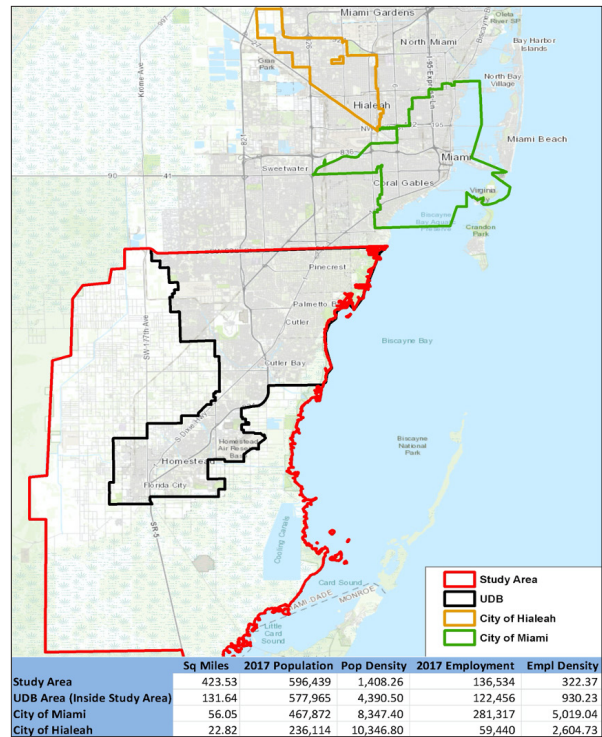


Figure 7: South Dade Job to Population Density vs. Large Cities in Miami-Dade County
Source: US Census Bureau

Given the relative low ratio of South Dade jobs to population, it should not be surprising that **many residents of South Dade leave the region every day to travel to work. There are 240,500 workers who live in South Dade but 72% work outside of South Dade.** However, South Dade does attract workers from outside the region primarily to serve the large employers within one mile of Kendall Drive. In 2017 there were 70,300 workers who lived outside South Dade but traveled to work in South Dade every day; 66,200 workers live and work in South Dade.

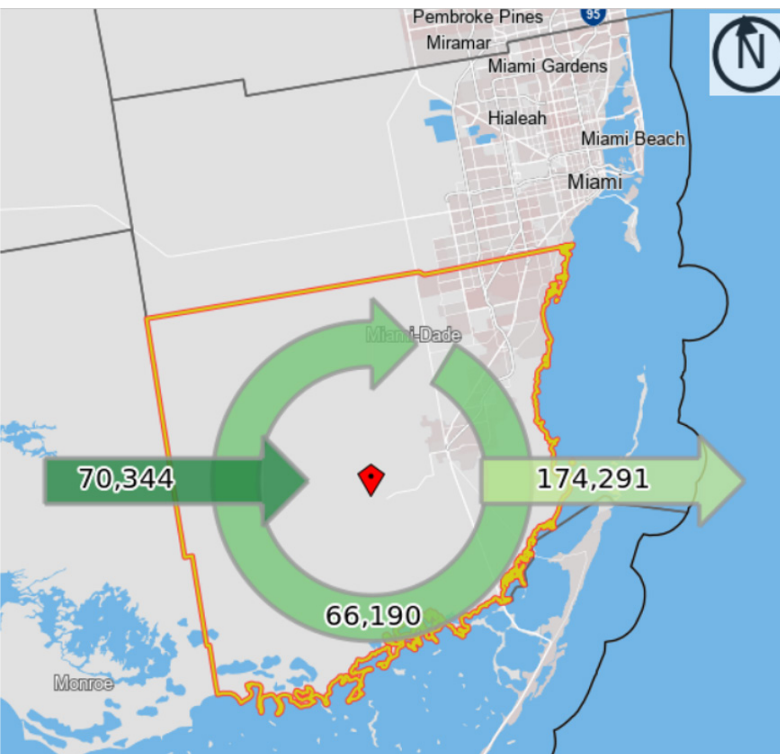


Figure 8: South Dade Job Inflow/Outflow 2017
Source: U.S. Census; BEA

While South Dade is a vibrant home to small businesses, rapid business growth is likely to be driven in part by the expansion and attraction of large companies that rely on smaller businesses located within South Dade. In order to get a better sense of the concerns of these large businesses we conducted an assessment of the 50 largest employers in the region and surveyed these employers, the responses of which have helped guide several of the recommendations in this plan. In summary as it relates to the largest employers in South Dade:

- » The 50 largest private employers in South Dade account for 16 percent of the total employment in the region.
- » The largest, Baptist Health Care has 3,000 workers, while the 50th ranked employer is the University of Miami with 193 workers in the South Dade. The University of Miami is the single largest non-governmental employer countywide.
- » Retailers, including the recently closed Bloomingdale's at the Falls, rank among the largest employers in South Dade. The importance of the transition of former retail spaces to new tenants is critical to maintaining employment in South Dade and ensuring that the large spaces these retailers occupy in malls are transitioned to new businesses to help maintain the employment base and support the continued health of these large retail centers.
- » The industries represented among the 50 largest employers are quite diverse and include industries at all wage classifications. These include Health Care, Food Service and Retail, Insurance, Professional Services, Tourism and Agriculture which are designated as emerging and traditional industries within this Plan.

Overall, the largest employment industries in South Dade are retail and health care/social assistance with more than 20,000 workers each, followed by Finance, Insurance, and Real Estate (FIRE) as well as Accommodations/Food Service and Professional Services with between 10,000 and 20,000 employees each.

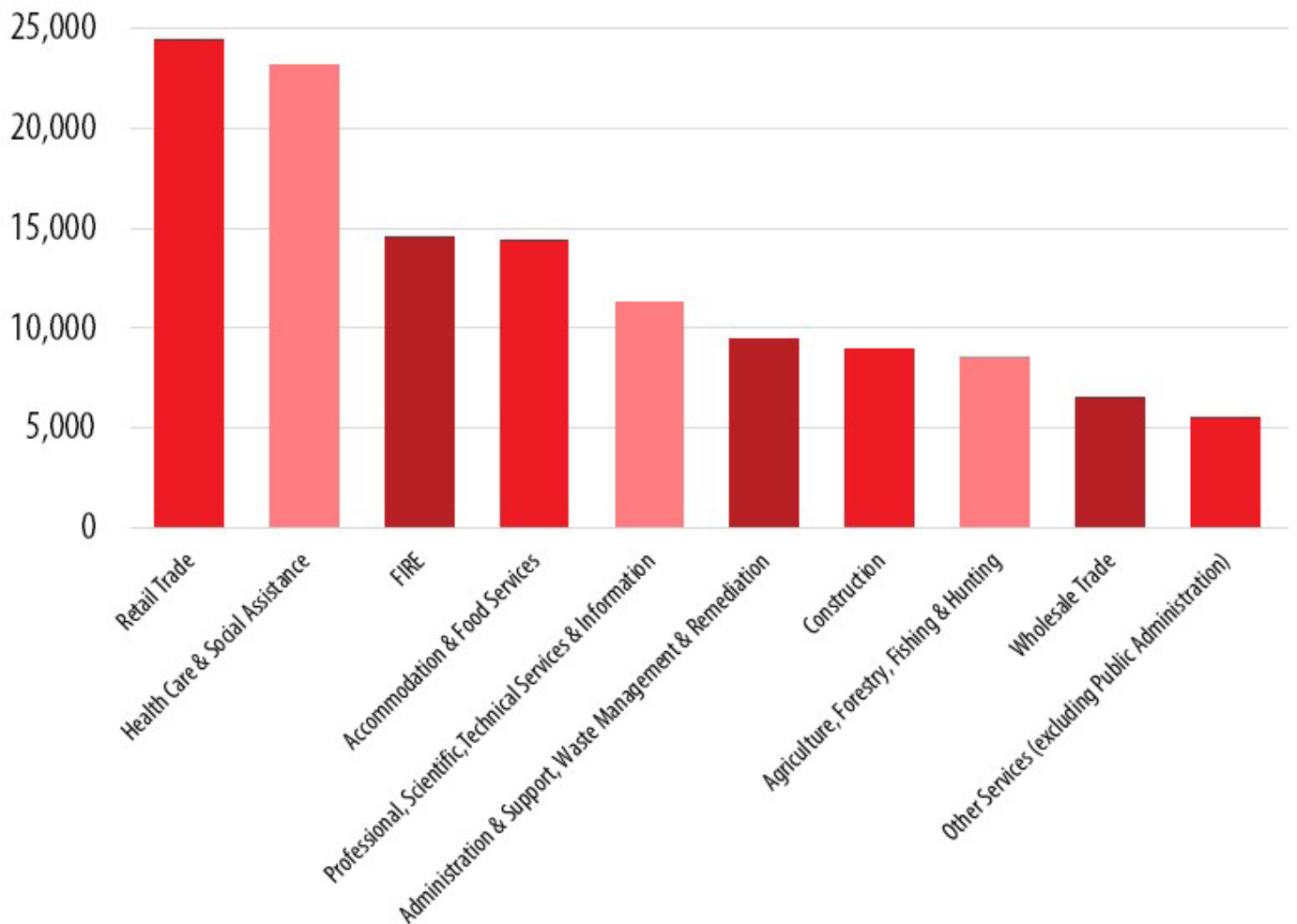
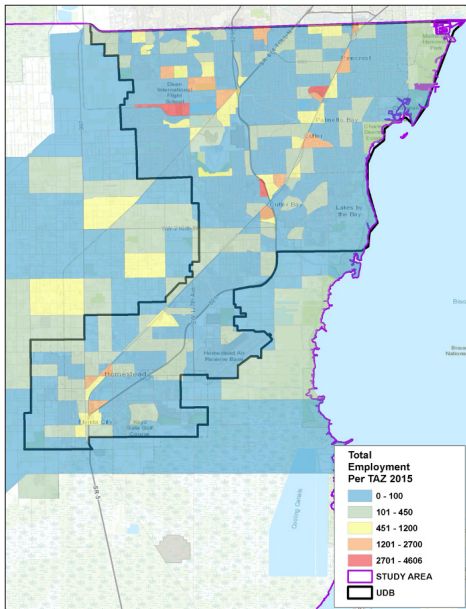


Figure 9: Ten Private Industry Sectors with Most Employment (2017)
Source: U.S. Census; BEA



As the following map (Figure 10) indicates, South Dade employment is reasonably well spread with several areas around major nodes (i.e. Baptist Hospital, The Falls) having a high workforce concentration.

The graph below (Figure 11) indicates the growth in employment by sector for Miami-Dade County as a whole in comparison to South Dade. Sectors where South Dade’s growth outpaced that of the Miami-Dade County are highlighted in yellow, while sectors which are traditional industries in South Dade whose growth has lagged behind that of countywide growth are highlighted in green.

Figure 10: South Dade Concentration of Workers by TAZ; Source: Miami-Dade TPO

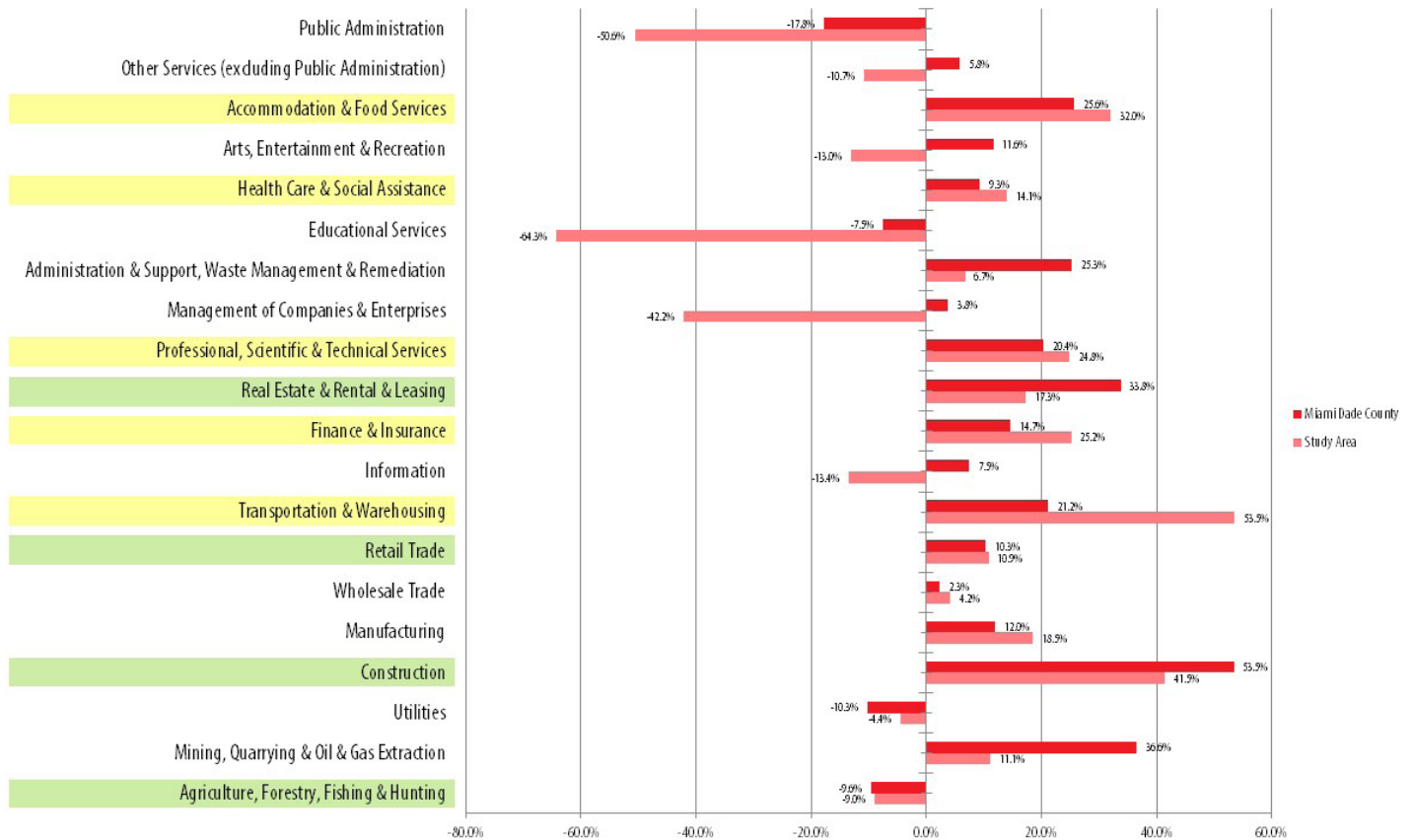


Figure 11: 2011-2017 Employment Sector % Growth/Loss ; Source: State of Florida; U.S. Census

The table below (Figure 12) provides the State of Florida's employment projections by Industry for Miami-Dade County as a whole between 2019 and 2027. Subarea projections are not produced by the State, but what stands out from these estimates is that a number of the strongest growth industries in South Dade are expected to be among the fastest growing industries through 2027 countywide

(highlighted below). This provides a strong indication and basis to help define the targeted emerging industries for the South Dade region for the foreseeable future. Other data also is indicative of the need to support several traditional industries (i.e. Agriculture, Public Administration/ Defense, Retail) given the relatively modest or negative growth projected by the State countywide.

INDUSTRY	EMPLOYMENT			
	2019	2027	GROWTH	PERCENT GROWTH
Total All Industries	1,292,693	1,389,390	96,697	7.5
Agriculture, Forestry, Fishing & Hunting	8410	8,413	3	0.0
Mining	517	531	14	2.7
Construction	53,079	57,314	4,235	8.0
Manufacturing	41,604	41,221	-383	-0.9
Wholesale Trade	73,949	75,591	1,642	2.2
Retail Trade	149,877	157,041	7,164	4.8
Transportation & Warehousing	76,800	84,089	7,289	9.5
Information	20,355	19,829	-526	-2.6
Finance & Insurance	51,512	53,793	2,281	4.4
Real Estate & Rental & Leasing	28,993	31,261	2,268	7.8
Professional, Scientific & Technical Services	85,317	97,214	11,897	13.9
Management of Companies & Enterprises	10,471	11,624	1,153	11.0
Administration & Support & Waste Management & Remediation Services	91,289	99,700	8,411	9.2
Educational Services	36,120	40,047	3,927	10.9
Health Care & Social Assistance	153,136	175,318	22,182	14.5
Arts, Entertainment & Recreation	16,587	17,417	830	5.0
Accommodation & Food Services	128,045	138,937	10,892	8.5
Other Services (except Government)	43,155	45,402	2,247	5.2
Government	143,175	147,895	4,720	3.3
Self Employed & Unpaid Family Workers, All Jobs	77,879	84,579	6,700	8.6

Figure 12: Miami Dade County Employment Projections by Sector (2019 to 2027); Source: State of Florida

Beyond trends in employment and demographics which support the growth of industry, there are two other aspects to economic market conditions which are central to defining the success or lack of success of any economic development strategy.

The first of these is the successful expansion of transit in light of the tremendous congestion in South Dade and throughout the County, and the fact that projected **growth is expected to be concentrated along the U.S. 1 corridor.** The second is related to the ability of the **educational system to be positioned and able to address and meet the human capital needs of the area's growing and new employers.** Without these inherent economic development infrastructure elements, the opportunities for healthy business growth in South Dade can be significantly hindered.

Transportation and associated land use regulations are being addressed through the Strategic Miami Area Rapid Transit (SMART) Plan comprehensive program planning process. South Dade is currently scheduled to have a fully operational South Dade bus rapid transit (BRT) transit corridor running within the South Dade busway by 2022. If successful in meeting ridership projections, the BRT will further attract business development along U.S. 1 corridor in proximity to stations. Industry conference calls completed as part of the development of this Plan indicated a need to ensure that headways at peak hours take into account bi-directional commuting from North to South as well as South to North, and the importance of an efficient feeder bus system to serve hospitals, major employers, and other employment nodes. Additionally, the Miami-Dade County Public Schools is seeking to evaluate the busway for use by school buses.

Beyond transportation, another backbone of regional economic development is education at all levels. Education is of equal importance to infrastructure as it relates to an area's economic development. The availability of strong local schools and higher education resources is continually cited as a principal driver of business location decisions and the economic health and welfare of a region. Beyond basic English, math, social studies, and science skills and knowledge, targeted curriculum for area businesses is important in secondary, adult, and university programs.

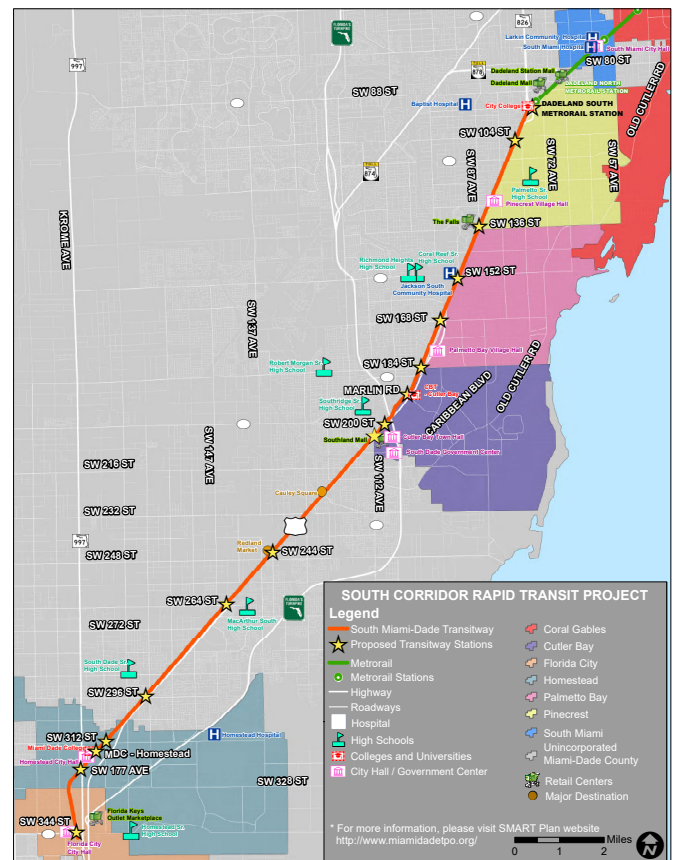


Figure 13: Smart Plan South Dade Corridor Plan Source: South Dade Corridor Smart Plan

A **Skills Gap Study** has been long proposed by Miami Dade College to better understand the “skills gap” between the skills that employers are looking for in their employees and the skills that job seekers possess.

This assessment should be considered at a subcounty level for South Dade if the countywide effort does not move forward in the near term.

As Norman Augustine, the former CEO of Lockheed Martin and Secretary of the Army noted, “Only by providing leading-edge human capital and knowledge capital can America continue to maintain a high standard of living including providing national security for its citizens.”

South Dade benefits from an extensive education network (see below). From an economic development perspective, it is **important to ensure close coordination between educational and vocational training institutions and employers to ensure that the workforce which is produced exceeds basic skills and is competitive in the workplace.** Placing all of the training requirements on businesses themselves places the region at a competitive disadvantage to other regions of the nation and world which use the public and private education system to effectively train the workforce in core skills before they ever begin their first day of work.

Miami-Dade County Public Schools

- » K-8 Centers – 24
- » Elementary Schools – 53
- » Middle Schools – 17
- » Senior High Schools – 12
- » Combination – 2
- » Alternative/Specialized Centers – 6

Private Schools

- » Gulliver
- » Palmer
- » Trinity
- » Westminster
- » Christian St. Thomas
- » Episcopal Montessori
- » Charter High Schools – 10

Higher Education

- » University of Florida Tropical Research and Education Center (TREC)’s mission is to develop solutions for Florida farmers by applying trade policy analysis and addressing related production and marketing issues.
- » Florida International University (FIU), Zoo Miami and the Zoo Miami Foundation are teaming up to expand conservation research opportunities for undergraduate college students.
- » Miami Dade College Kendall and Homestead Campuses offer a full range of educational programs. In addition, to academic programs that include entertainment technologies, nursing, and the arts and sciences. The Homestead Campus is home to the Eig-Watson School of Aviation; an FAA approved program providing theoretical knowledge and real-world skills.

NAICS 2-DIGIT EMPLOYMENT CODES	NEW JOBS (2017-2019)		
	SCENARIO A BASELINE HISTORIC TREND	SCENARIO B MODERATE INTERVENTION	SCENARIO C SIGNIFICANT INTERVENTION
Agriculture, Forestry, Fishing & Hunting	3	3	4
Mining, Quarrying & Oil & Gas Extraction	2	2	2
Construction	690	690	690
Manufacturing	(68)	(68)	(68)
Wholesale Trade	274	274	274
Retail Trade	1,252	1,252	1,252
Transportation & Warehousing	398	547	802
Information	(70)	(70)	(70)
Finance & Insurance	519	769	1,026
Real Estate & Rental & Leasing	119	119	119
Professional, Scientific & Technical Services	1,595	2,391	3,188
Management of Companies & Enterprises	-	-	-
Administration & Support, Waste Management and Remediation	300	300	300
Educational Services	-	-	-
Health Care & Social Assistance	4,690	7,021	9,361
Arts, Entertainment & Recreation	-	-	-
Accommodation & Food Services	1,481	2,222	2,963
Other Services (excluding Public Administration)	-	-	-
Public Administration	482	482	482

Figure 14: Employment Growth Scenarios Under Various Economic Development Strategies: No Intervention vs. Moderate to Significant Intervention

Based upon the data analytics in the Background to the Market section of this report, the table on the following page (Figure 14) details three growth employment scenarios by industry for South Dade between 2019 and 2027. The first scenario is if South Dade continues upon its current path of growth while Scenario B and C are indicative of enhanced growth as a result of the implementation of a focused South Dade economic development strategy. While nobody can guarantee the success of the economic development initiative and strategies outlined herein, using the proprietary REMI regional input/output model we are able to estimate the relative economic and fiscal benefits associated with enhanced employment growth and mitigation of employment loss for traditional industries in the region. This analysis in turn provides a basis and rationale for making the modest investment in economic development called for in this Plan given the relative high fiscal and economic returns which may result. The outcomes of the REMI model under the three scenarios outlined in Figure 14 on the following page are detailed in Section 7 of this plan.

SECTION 4

OPPORTUNITY SITES EVALUATION & RECOMMENDATIONS

In the preparation of the Strategic Economic Development Plan For South Dade, the Project Team reviewed and evaluated existing relevant policy plans and regulations for the purpose of determining how these policies may promote or constrain economic development opportunities in the study area. Subsequently, Calvin, Giordano & Associates (CGA) provided recommendations regarding potential modifications that may be required to accomplish the desired project vision and goals.

To accomplish this the consultants reviewed municipal comprehensive plans and zoning codes as well as other studies and plans, and then examined and analyzed a list of sites located within the study area (defined by the area bound on the north by SW 88th Street / Kendall Drive and to the west, south and east by the Miami-Dade County Urban Development Boundary (UDB) (Figure 2). The sites were reviewed for their potential to be developed for either industry, office, service, retail, or mixed at a scale capable of generating potential concentrations of employment based on a variety of factors, including local policies and regulations.

The review herein has been conducted at a high level and does not replace or supersede municipal review of potential development proposals on a site-by-site basis.

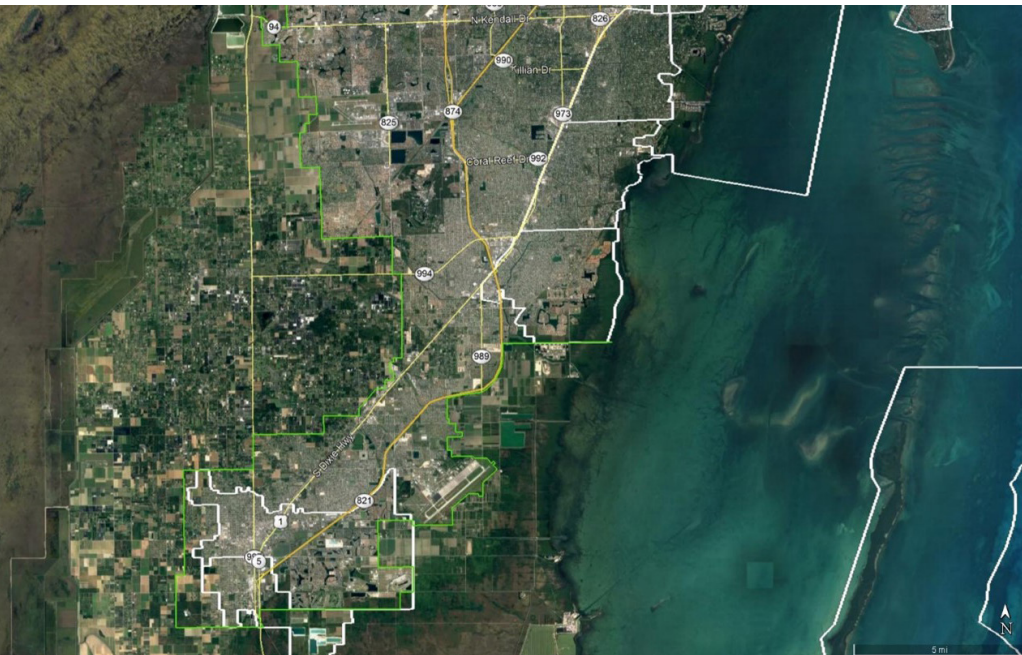


Figure 15. Study Area

DATA

An initial list and mapped GIS files of over 200 sites scattered throughout the study area (Figure 2) served as the starting point. All the sites are located within the UDB. The sites were identified and mapped using Miami-Dade County public property records and data from the Miami-Dade County Open Data Hub based on four factors:

- » Location within the study area
- » Privately owned
- » Vacant
- » At least 10 acres in land area

To refine the initial list of sites, a series of GIS data layers also obtained from the Open Data Hub were added including the following:

To the base map:

Municipal Boundary: <https://gis-mdc.opendata.arcgis.com/datasets/municipal-boundary>

Urban Development Boundary: <https://gis-mdc.opendata.arcgis.com/datasets/urban-development-boundary>

As data “filters”:

Wetland AOC: <https://gis-mdc.opendata.arcgis.com/datasets/wetland-aoc>
Highway: <https://gis-mdc.opendata.arcgis.com/datasets/highway> (Figure 3)

Miami-Dade County Bus Routes: https://gis-mdc.opendata.arcgis.com/datasets/a33afaedf9264a97844080839a6f5ec9_0
Bus Stop: <https://gis-mdc.opendata.arcgis.com/datasets/bus-stop> (Figure 4)

Existing Land Use: <https://gis-mdc.opendata.arcgis.com/datasets/land-use>

Future Land Use: <https://gis-mdc.opendata.arcgis.com/datasets/municipal-future-land-use>
Municipal Zone: <https://gis-mdc.opendata.arcgis.com/datasets/municipal-zone>

County Zoning: <https://gis-mdc.opendata.arcgis.com/datasets/county-zoning-1>

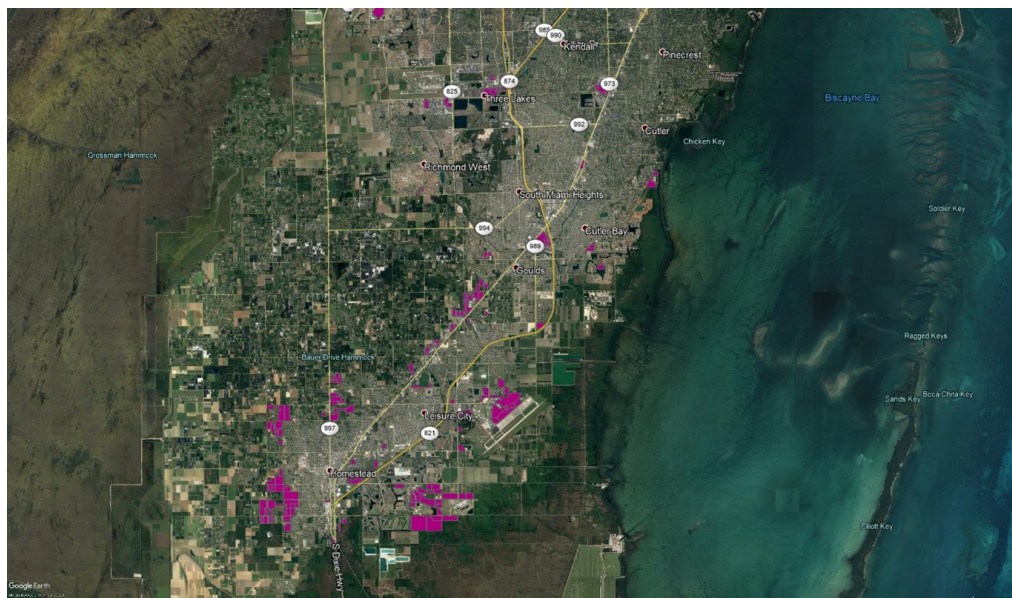


Figure 16. Initial Set of Potential Economic Development Locations

Analysis

In addition, in the absence of municipal government infrastructure service maps, the following layers were used to generally infer the current absence or presence of central public infrastructure, and of potential, planned or ongoing capital infrastructure improvement which could positively impact the suitability of a site for future development:

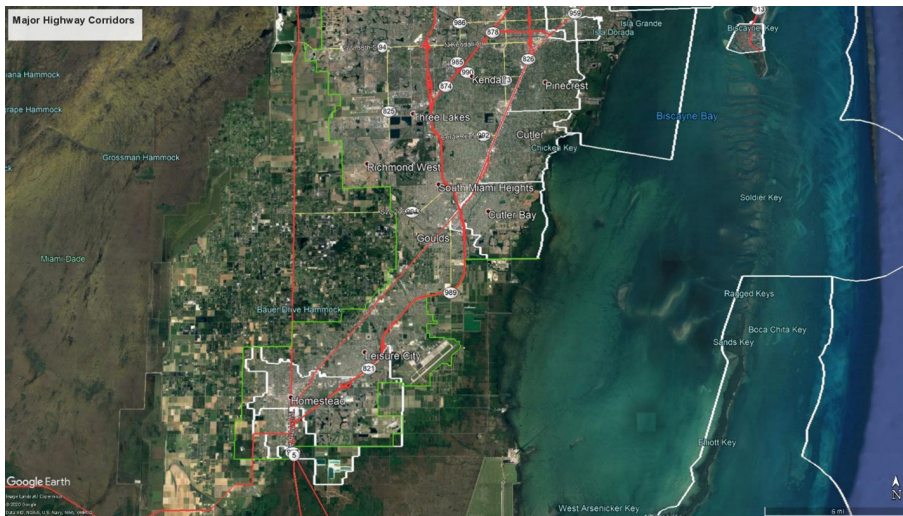


Figure 17. Major Highway Corridors

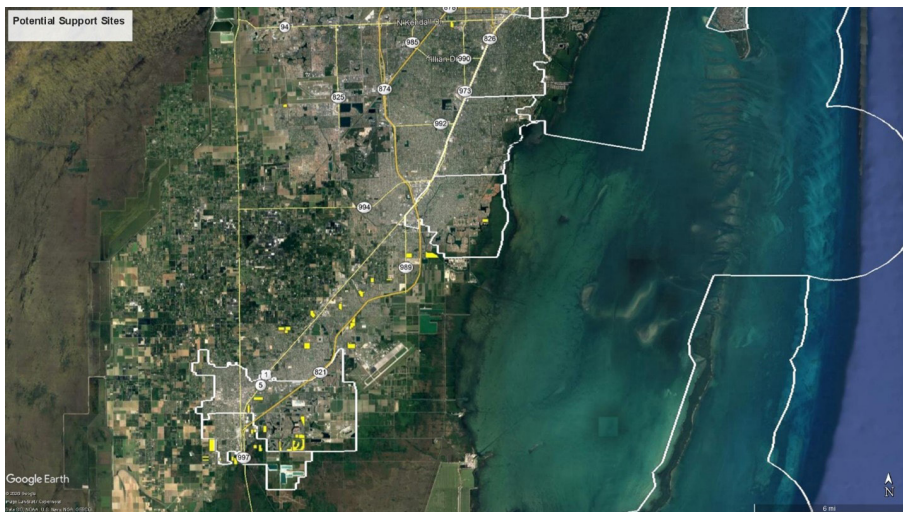


Figure 18. Location of Miami-Dade County Bus Stops

- » DOH Septic System: <https://gis-mdc.opendata.arcgis.com/datasets/doh-septic-system> (only new OSTDs or repair to existing OSTD permits) (Figure 5)
- » DOH Well Permit: <https://gis-mdc.opendata.arcgis.com/datasets/doh-well-permit> (only new wells or repairs to existing well permits) (Figure 6)
- » DTPW - Capital Improvement – Sewer: <https://gis-mdc.opendata.arcgis.com/datasets/dtpw-capital-improvement-sewer> (Figure 7) DTPW - Capital Improvement – Water: <https://gis-mdc.opendata.arcgis.com/datasets/dtpw-capital-improvement-water> (Figure 8)
- » Historic District: <https://gis-mdc.opendata.arcgis.com/datasets/historic-site> <https://gis-mdc.opendata.arcgis.com/datasets/historic-district>

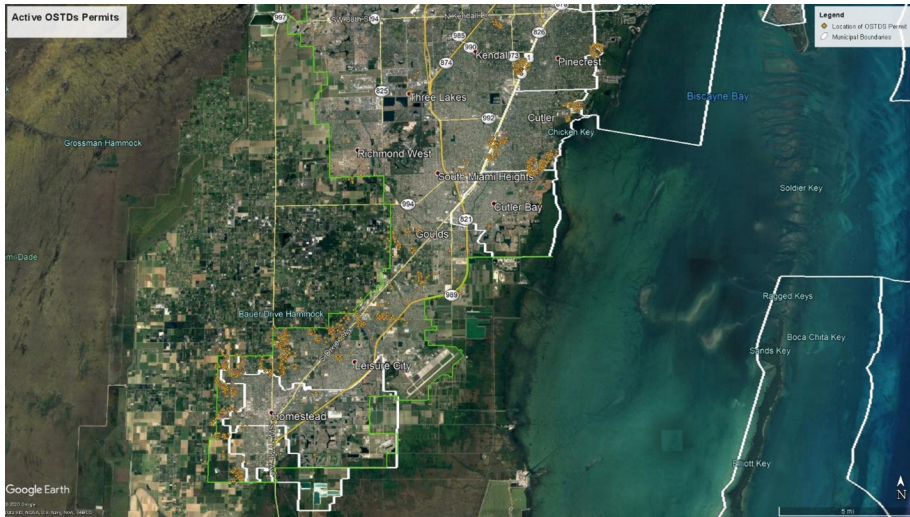


Figure 19. Active OSTDs Permits

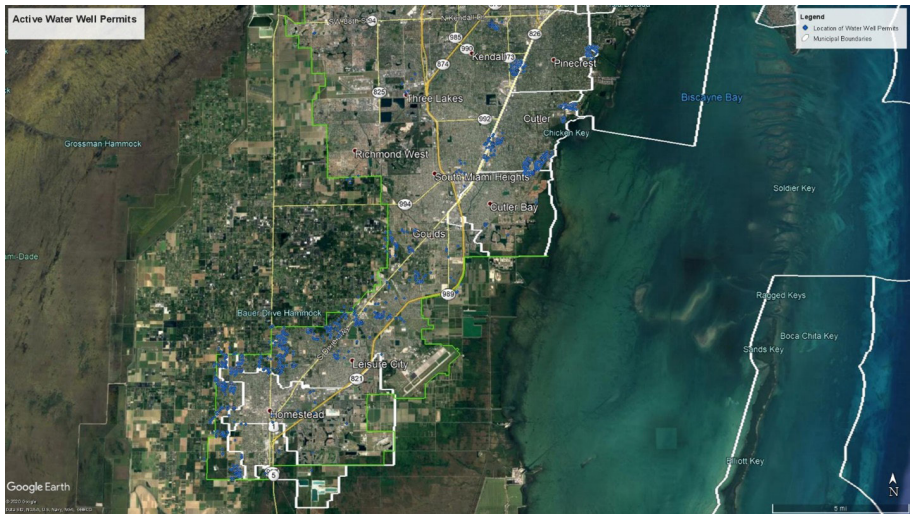
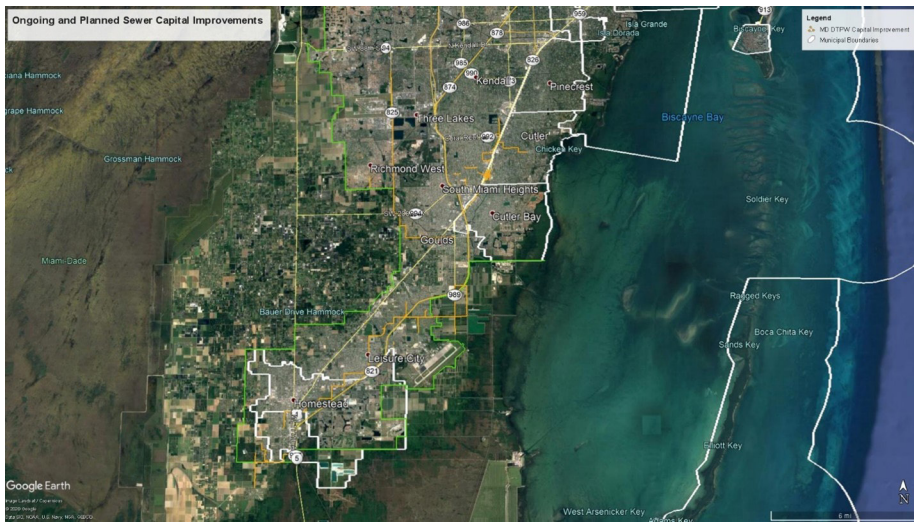


Figure 20. Active Water Well Permits

It is worth noting that these data **do not in any way indicate traffic, water or sewer infrastructure capacity.** Additional consultation with each municipality and localized study of individual sites is recommended in the future.

To supplement our understanding of this and other topics related to the site “suitability” analysis, CGA also reviewed the following information:



- » Municipal Comprehensive Plans, Future Land Use Maps and Zoning Maps.
- » SMART Plan South Dade Transit Corridor Land Use Scenario and Visioning Planning Report dated 10/10/19 and produced by CGA). The locations of recommended future BRT stops from this and related studies were added to the map as well.

Figure 21. Ongoing and Planned Capital Improvements – Sewer

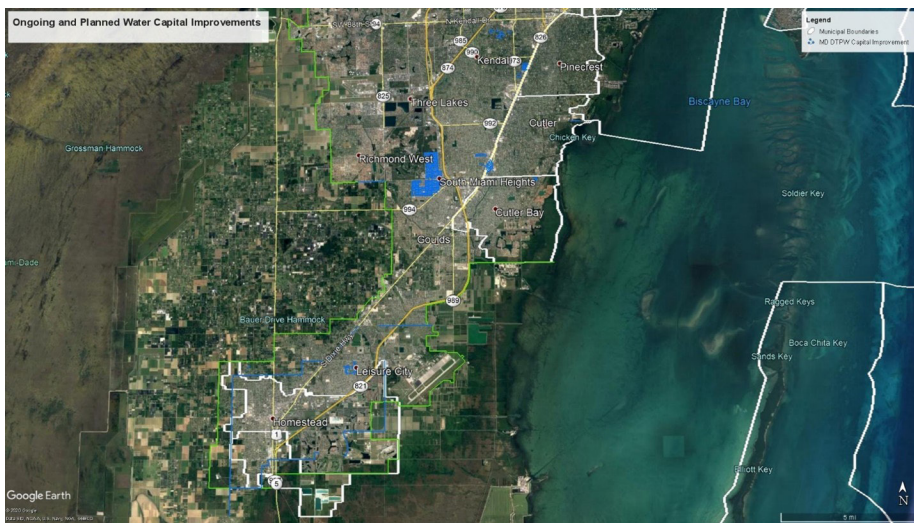


Figure 22. Ongoing and Planned Capital Improvements – Water

METHODOLOGY

For functionality purposes (given the large amount of data being used) the base map and initial sites layer were imported, as well as the additional GIS layers obtained from Miami-Dade County Open Data Hub as a .kmz format project file into Google Earth Pro. This allowed the team to manipulate the layers and zoom in to examine conditions at a variety of scales.

By doing this, the team was able to immediately eliminate a number of sites which, upon further examination of the property records, were found to be publicly owned (e.g., rights of way), as well as sites which were identified as properties that may contain wetlands according to the Wetland Area of Concern (AOC) layer from the Open Data Hub.

Likewise, a visual sweep eliminated some sites presently developed with economic development activity (industrial, office or commercial) but which are not likely redevelopment sites, as well as any site found (through knowledge of municipal approval activity) already committed for development or redevelopment.

In addition, sites were set aside that were found to be located amid existing residential neighborhoods and designated in the local Future Land Use and Zoning maps as residential sites. These were relocated to their own layer within the .kmz file and identified as potential residential support sites, because they (along with others not included in the initial list) could be encouraged to be developed for workforce and other housing to support economic development at the local and regional level. A map of the potential residential support sites is displayed in Figure 23.

New sites were also added to the list, including several recognized in municipal comprehensive plans or other local studies as targeted redevelopment sites, or sites that were similarly identified in the SMART Plan South Dade Transitway study as potential transit-oriented mixed-use employment centers.

The team subsequently identified, categorized and allocated magnitude to the different criteria against which the sites could be evaluated using on the data provided in the layers obtained from the Miami-Dade County Open Data Hub. The intent was to establish a simple point allocation system, filtered through the relative “importance” of each criterion or sub-criterion. This enabled the ranking of the sites based on the sum of their allocated points.

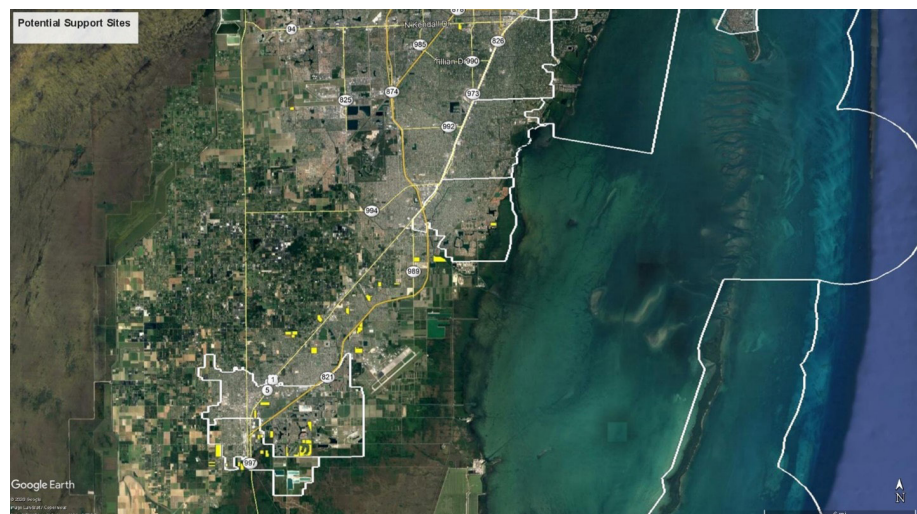


Figure 23. Potential Residential Support Sites

The evaluation criteria, with their assigned point system is detailed in the table below.

- » High (30+ points) = Tier 1
- » Medium (20-29 points) = Tier 2
- » Low (> 20 points) = Tier 3

Based on the point allocations and resulting rankings, the following point ranges were established in order to determine the tier assignments:

CRITERION	SUB-CRITERION	POINTS
1 Infrastructure Availability	Infrastructure exists	12
	Infrastructure is or may be lacking but capital improvements are ongoing or planned	6
	Infrastructure is or may be lacking but no capital improvements are planned	1
	Highway accessible (within 0-1.0 of an access ramp to Turnpike, Palmetto, Don Shula, or US-1)	10
2 Highway Accessibility (for movement of goods) (Figure 25)	Accessible (within 1.0-3.0 miles of an access ramp to Turnpike, Palmetto, Don Sula, or US-1)	5
	Low accessibility (more than 3.0 miles of an access ramp to Turnpike, Palmetto, Don Shula, or US-1), or within 1 mile of a major intersection of Krome Avenue)*	1
3 Site Vacancy	Vacant	5
	Not Vacant	2
4 Transit Access (for work mobility) (Figure 26)	High transit accessibility (within ¼-mile from a busway stop or proposed SMART Plan stop, or multiple bus route stops)	4
	Low transit accessibility (more than ¼-mile from a busway stop or proposed SMART Plan stop; or access only to limited number of bus routes)	1
	No land assembly (single site, 10+ acres)	3
5 Need for Land Assembly	Some land assembly (adjacent sites between 5-10 acres)	2
	Major land assembly (adjacent sites including sites >3 acres)	1
6 Future Land Use & Zoning Designations	Suitable FLU and zoning are in place	3
	Suitable FLU is in place, but not zoning	2
	Suitable FLU and zoning are not in place but are amendable	1

Figure 24. Criteria Ranking of South Dade Development Sites for Large Scale Economic Activity

*Krome is considered low access until the completion of FDOT’s ongoing Krome Avenue widening and related truck bypass project, which is expected to redirect truck traffic from Krome Avenue to US-1 along SW 312 Street (Campbell Drive), SW 336 Street (Davis Parkway) and SR 9336 (Palm Drive). These projects are anticipated to be completed in 2021.

Based on this point allocation system, the highest possible site score is 37 points and the lowest 12 points.

RESULTS

Although the original intent of this exercise was to narrow down the list of potential sites, CGA determined that utilizing this simplified adaptation of a multi-criteria decision and hierarchical analysis (Figure 27) allowed for the sites to be classified based on their comparative degree of “readiness” to accept economic development activity, and then be assigned to three “readiness” tiers without being dismissed altogether.

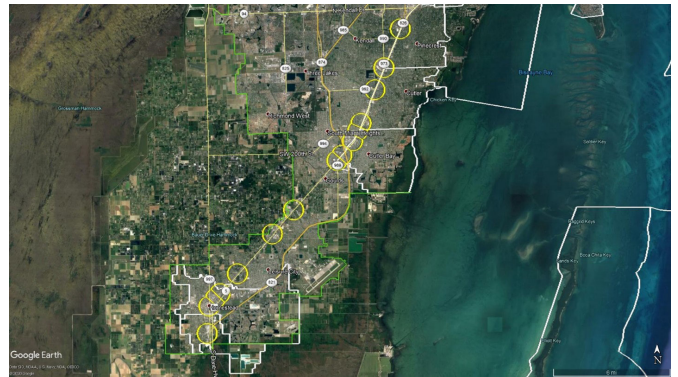


Figure 26. Proposed SMART Plan South Dade Transitway Transit-Oriented Station Areas

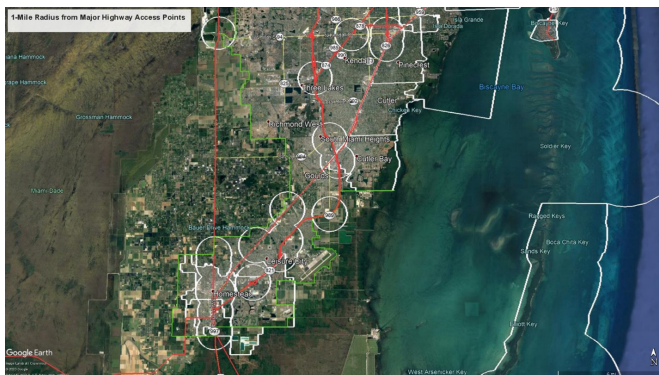


Figure 25. One-Mile Radius Buffer from Major Highway Access Points

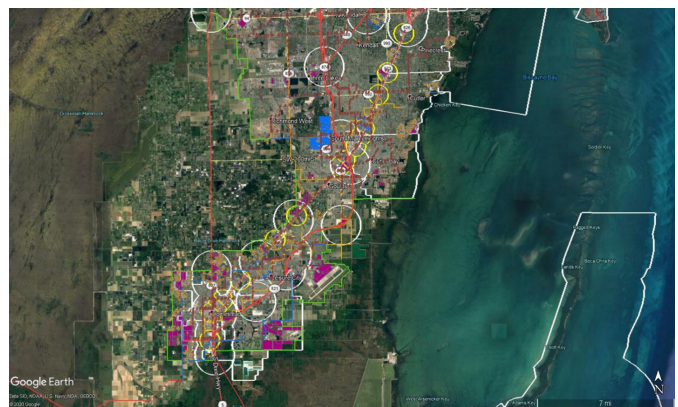


Figure 27. Composite Site Analysis Map

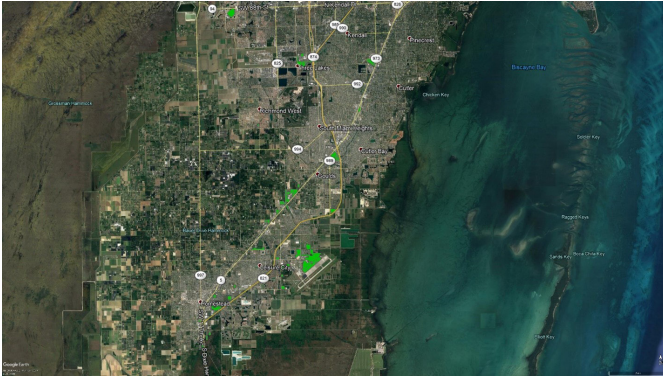


Figure 28. Tier 1 Sites

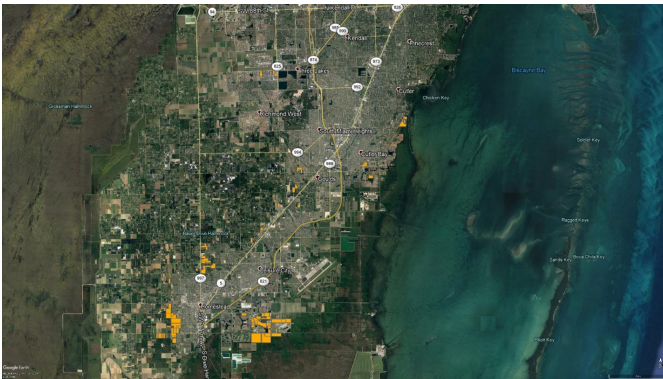


Figure 29. Tier 2 Sites

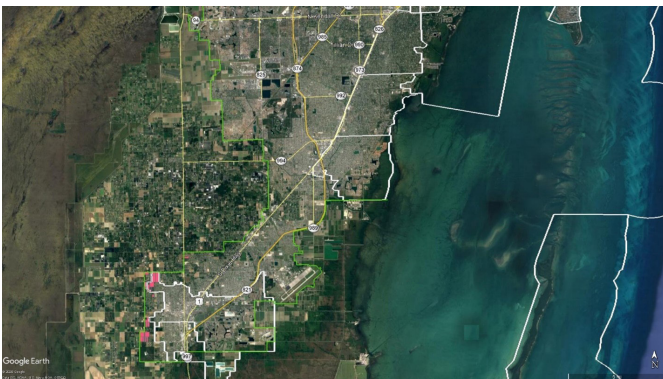


Figure 30. Tier 3 Sites

Tier 1: High rankings = Potential short-term or “low-hanging fruit” opportunities (“Economic development-ready”). These include mostly sites that are vacant or prime for redevelopment, where no land assembly is necessary, are well located relative to highway and transit access, with central infrastructure and economic development-friendly future land use and zoning designations (or if not, at least amendable). A map of the Tier 1 sites is shown in Figure 28.

Tier 2: Moderate rankings = Potential mid-term opportunities. There are some possible combinations of criteria for these rankings but mostly this tier includes sites that are vacant. Some land assembly may be necessary though not in all cases. Typically, these sites seem to have good highway and transit access but may not have infrastructure in place today. However, there are ongoing or planned infrastructure improvements that may make the area more favorable for development in the future. The appropriate future land use and zoning designations may or may not be in place but may be easily amendable. A map of the Tier 2 sites is shown in Figure 29.

Tier 3: Low rankings = Potential long-term opportunities. Again, there are different combinations of points that can result in a low ranking, but generally the sites in this tier are not prime for development or redevelopment due to the need for major land assembly efforts, low highway and/ or transit accessibility, no central infrastructure and no planned improvements in the foreseeable future, and future land use and zoning designations inconsistent with the purpose or not easily amendable. A map of the Tier 3 sites is shown in Figure 30.

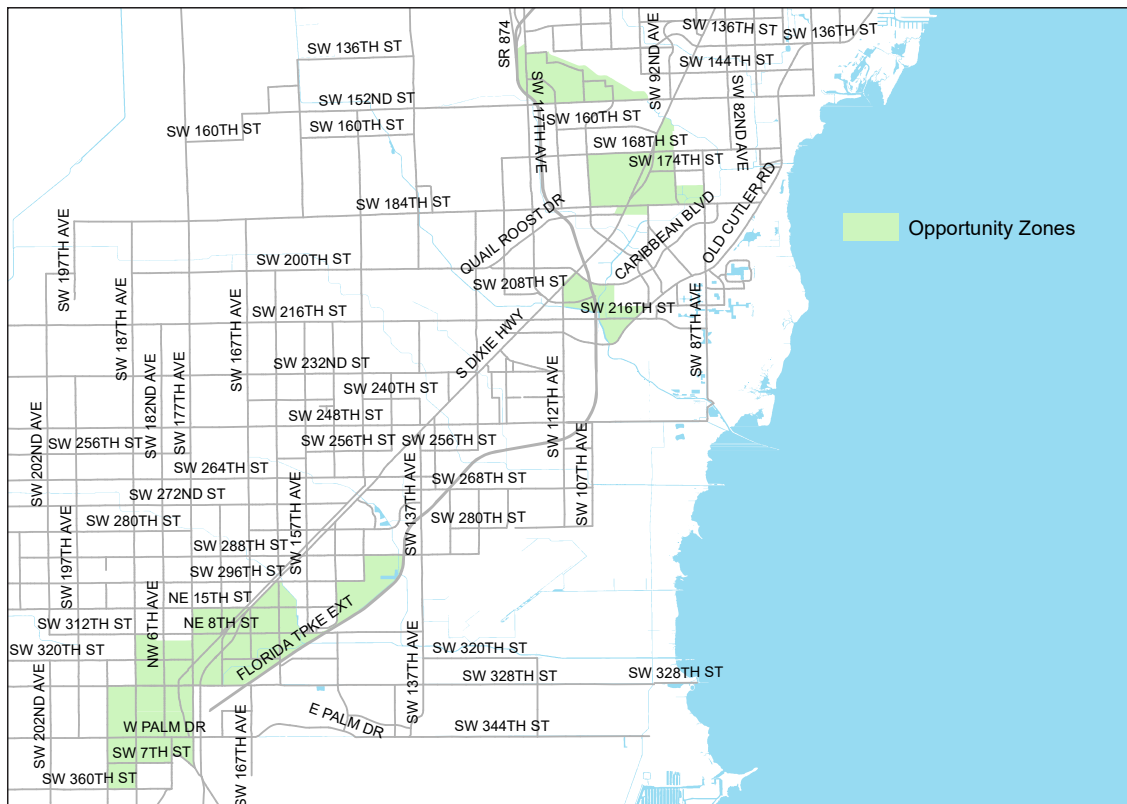
OPPORTUNITY ZONES

Although not factored into the ranking of potential sites, given that the Opportunity Zone program does not influence the suitability of sites for certain economic developments, the Zones can be an important tool in encouraging investment in an area where the underlying qualities, land use, and positioning of a site is already appropriate.

An Opportunity Zone is an economically distressed community where private investments, under certain conditions, may be eligible for capital gain tax incentives. Opportunity Zones were created to stimulate economic development and job creation,

by incentivizing long-term investments in low-income neighborhoods. There are more than 8,760 designated Qualified Opportunity Zones (PDF) located in all 50 States, the District of Columbia, and five United States territories. Investors can defer tax on any prior gains invested in a Qualified Opportunity Fund (QOF) until the earlier of the date on which the investment in a QOF is sold or exchanged or until December 31, 2026.¹

Of the 67 Opportunity Zones that have been designated in Miami-Dade County, nine are located in the South Dade area as noted in the map below.



The zones are identified by their census tract number and are further described as:

Census Tract 83.04

Municipality: Village of Palmetto Bay

Tract Income Level: Moderate

Tract Population: 8910

Tract Minority Population: 95.97%

Census Tract 83.09

Municipality: Town of Cutler Bay

Tract Income Level: Moderate

Tract Population: 4445

Tract Minority Population: 97.17%

Census Tract 82.08

Municipality: Town of Cutler Bay

Tract Income Level: Middle

Tract Population: 4765

Tract Minority Population: 72.57%

Census Tract 106.09

Municipality: Town of Cutler Bay/Unincorporated Miami-Dade

Tract Income Level: Moderate

Tract Population: 4676

Tract Minority Population: 84.04%

Census Tract 110.01

Municipality: City of Homestead/Miami-Dade County

Tract Income Level: Moderate

Tract Population: 10717

Tract Minority Population: 94.53%

Census Tract 110.05

Municipality: Unincorporated Miami- Dade county

Tract Income Level: Middle

Tract Population: 7042

Tract Minority Population: 92.53%

Census Tract 111.01

Municipality: City of Homestead/

Unincorporated Miami-Dade County

Tract Income Level: Moderate

Tract Population: 9260

Tract Minority Population: 92.56%

Census Tract 113

Municipality: City of Homestead

Tract Income Level: Low

Tract Population: 9438

Tract Minority Population: 97.12%

Census Tract 114.03

Municipality: City of Florida City

Tract Income Level: Moderate

Tract Population: 7050

Tract Minority Population: 85.15%²

1. <https://www.eda.gov/opportunity-zones/>

2. <https://www.ffiec.gov/census/report.aspx?year=2020&county=086&tract=0114.03&state=12&report=demographic>

All of the Opportunity Zones are located within the U.S. 1 corridor with access to infrastructure, public transportation services and other public services. The Beacon Council has issued the Miami-Dade County Opportunity Zones Prospectus which contains information regarding financing, training and other partner organizations available to participate in the development process.

CONCLUSIONS & RECOMMENDATIONS

The preceding is not an exhaustive analysis of every vacant or targeted redevelopment site in South Miami-Dade County. The sites were identified and evaluated in a fairly elementary manner, but the outcomes provide insightful “big picture” conclusions regarding areas of the South Dade region which offer potential for economic development activity through coordinated regional and local action. (Figure 16)

The areas that present the most promise based on the criteria used for this analysis include locations in Palmetto Bay (The Falls), Cutler Bay (Southland Mall), Florida City, Homestead (including land surrounding the Reserve Air Force Base and the Speedway), and unincorporated Miami-Dade County including potential concentrations of sites adjacent to the historic communities of Princeton and Naranja. Both areas fall within Miami-Dade County-designated urban centers. Urban centers are overlay districts which supersede underlying land use designations and form the pattern of development, densities, intensities, and uses. None of the sites identified

are in the Village of Pinecrest, the northernmost municipality in the South Dade region.

The sites in **The Falls, Southland Mall, Princeton, and Naranja are also located along the South Dade Transitway Corridor and are identified as proposed locations for BRT stations and therefore suitable for transit-oriented economic development.** We have sought to integrate the recommendations of the SMART Plan study for this corridor for those areas to the extent possible, and further suggest that other proposed station locations should also be considered for their economic development potential as part of the Plan.

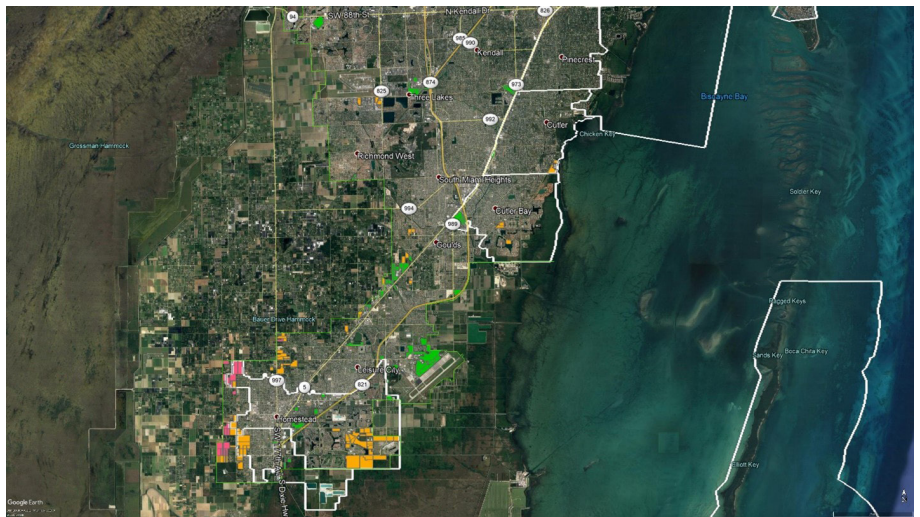


Figure 31. Composite Tier Map

LAND USE POLICY RECOMMENDATIONS TO BEST ACCOMMODATE ECONOMIC DEVELOPMENT BY JURISDICTION

1. VILLAGE OF PINECREST

While none of the sites identified in our study are in the Village of Pinecrest (the northernmost municipality in the South Dade region), we reviewed its policy framework because the SMART Plan proposes a BRT station at the intersection of US-1/South Dixie Highway and SW 104th Street. The SMART Plan envisions an increase of more than 1,600 jobs within the station area as a result of development intensification at this location. The transit-supportive development, however, is anticipated to occur on the unincorporated portion of the station area (west of the transitway), since the Village's permitted land use generally **does not encourage the type of compact, vertically or horizontally integrated mixed-use development at intensities that would be transit-supportive.**

2. VILLAGE OF PALMETTO BAY

There are two sites identified within the Village of Palmetto Bay's boundaries. One of the sites falls in Tier 1 and the other one in Tier 2.

The site in Tier 1 is on the South Dade Transitway and on the edge of a proposed BRT station area. It is part of the Village's designated Franjo Activity Center (FAC), where regulations are designed to encourage higher densities and intensities that

will **support transit-oriented development.** The FAC has been experiencing significant change in recent years, and other sites within this activity center could be considered for additional economic development activity potential. The SMART Plan envisions adding about 1,400 jobs in this station area as a result of future transit-oriented redevelopment.

The site in Tier 2 includes vacant land within the **Palmetto Village Center (the former Burger King headquarters).** While this site is attractive for economic activity given the office and parking infrastructure already in place, it received a moderate ranking because it **scored lower on highway and transit access criteria.**

3. TOWN OF CUTLER BAY

There are 22 sites included in the list, but most of them are part of the Southland Mall area which falls in Tier 1. Southland Mall is part of the Town's Center District, which falls within one of the proposed SMART Plan station areas. The Town has been **very proactive in preparing for transit-supportive development** in this area. The sites include not just the mall itself but also several outparcels and the building that currently houses the Town Hall (which will be relocated as a result of the Town negotiating a land swap). The Town Center District Plan encourages the redevelopment of the

Southland Mall area with a high concentration of mixed uses at high densities and intensities.

The remaining identified sites include several large tracts of vacant land that are part of the Old Cutler Road Mixed Use Corridor and the Lakes by the Bay Mixed Use site. The former sites are well positioned for potential commercial and office activity but ranked moderately because of their score on the highway and transit accessibility criteria. The Lakes by the Bay site is surrounded by established residential neighborhoods. In this context, it is likely to be developed as a neighborhood-scale mixed-use development with a predominant residential component. Importantly, the future land use and zoning are in place for all of the sites identified in Cutler Bay.

4. CITY OF HOMESTEAD

This study identified 38 potential sites within the City of Homestead. Many surround the Homestead-Miami Speedway (HMS).

The sites in the vicinity of the Speedway are owned either by HMS or the City of Homestead and are part of the Villages of Homestead Development of Regional Impact (VOH DRI) originally approved in 1975. These sites ranked moderately (Tier 2) due to lower scores against the highway and access criteria.

The list of sites in Homestead includes several scattered sites that ranked high (Tier 1) on most categories; some are adjacent or near to the Turnpike Extension. However, only one of the sites identified is within a proposed SMART Plan BRT station area. The SMART Plan identified three potential station locations with land within the

City of Homestead: at SW 312th Street/Campbell Drive (old Homestead City Hall site); at Miami-Dade College; and at SW 177th Avenue/Krome Avenue (straddling into the City of Florida City). The SMART Plan vision for these three station areas, if realized, could add more than 8,000 new jobs in Homestead and Florida City. The new development and redevelopment sites within the proposed station areas should be considered. The City of Homestead has a variety of future land use designations and zoning categories that may be considered economic development friendly.

There are also several sites located in the northwestern and southwestern sectors of the City that are classified as either Tier 2 or Tier 3 sites. This is mostly due to a present lack of infrastructure, but some of these sites are in the path of planned infrastructure.

5. CITY OF FLORIDA CITY

There are 12 sites identified as being within the boundaries of the City of Florida City. Aside from four Tier 1 sites located either within or adjacent to a proposed SMART Plan BRT station area, the remaining eight sites are Tier 2 sites at the western edge of the City. These sites currently lack adequate infrastructure and appropriate future land use and zoning designations, but ongoing or planned infrastructure improvements may make these sites more attractive for development in the long-term future.

The City of Florida City is the third oldest municipality in Miami-Dade County. The City's Comprehensive Plan is due for an update, particularly because consistency between the Future Land Use Map and the Zoning Map is weak.

The City of Florida City Comprehensive Plan is the only one aside from Miami-Dade County's to include an economic development element, but the plan is overdue for an update. **Consistency between the Future Land Use Map and the Zoning Map is weak, and the categories where economic development activity could occur, such as Urban Activity Center, are not designated in the Zoning Ordinance or Zoning Map.**

6. UNINCORPORATED MIAMI-DADE COUNTY

Most of the sites (127) on the list are in unincorporated Miami-Dade. They are dispersed throughout the study area but grouped within those scattered areas.

Of the 127 sites, 57 of them fall in Tier 1. **Many of the Tier 1 sites are near or adjacent to the Homestead Air Reserve Base (HARB). The Falls Shopping Center, located at the intersection of SW 136 street and U.S. 1 is a potential hub for future redevelopment especially as it lies at the nexus of the Village of Pinecrest, the Village of Palmetto Bay, and unincorporated Miami-Dade County.** With the loss of Bloomingdale's as its anchor at the eastern end of the center, the shopping center is reinventing itself to be more community oriented and inclusive of local shops and services. At this time, it is anticipated that the **former Bloomingdale's building will be razed and replaced with a Life Time Athletic Resort and Spa which will be about 60% of the size of Bloomingdale's. Slated to open in 2022, the club operates as a "modern country club" with amenities including dining, spas, and classrooms, in addition to upscale workout facilities.**

HARB is a major economic force, ranking as the second largest employer in the South Dade region. These sites ranked high (Tier 1); however, land uses in the proximity of HARB are required be compatible with the operation of a Defense installation pursuant to Section 163.3177(3)(a), Florida Statutes. There are location and height restrictions based on noise contours and flight paths to consider.

As mentioned previously, several other groupings of Tier 1 sites are in or adjacent to the designated Urban Centers of the historic communities of Naranja and Princeton, which have regulations that encourage development and redevelopment suitable for economic development purposes.

Further, two of the proposed SMART Plan BRT stations are located at the core of these Urban Centers. Identified sites are within the boundaries of the station areas. The SMART Plan vision for the Princeton station area projects a potential increase in jobs here of nearly 2,500. In Naranja, the SMART Plan projects a potential increase of more than 2,200 jobs. Both areas have land use capacity for significantly higher numbers based on the future land use and zoning.

There is also a Tier 1 opportunity site in Naranja Lakes adjacent to the future Larkin Health Sciences Campus.

The SMART Plan study indicates that there is a significant imbalance in the residents-to-jobs equation in this part of the South Dade Transitway corridor (4:1 ratio versus 2:1 in the County as a whole). One of the **goals of the SMART Plan is to create more balanced land uses.**

In the northern, West Kendall portion of the study area, there is a smattering of large Tier 1 opportunity sites in the Three Lakes area (north of Zoo Miami). Several of the sites are owned by FPL. These and the adjoining privately owned sites are conveniently located adjacent to existing industrial areas and easily accessible to the Turnpike Extension and the Don Shula Expressway.

Several sites adjacent to the Kendall-Tamiami Executive Airport are in Tier 2, primarily for scoring slightly lower against the highway and transit access criteria. In addition, it was not possible to obtain timely information regarding potential Airport land acquisition or expansion plans. Future development may be required to comply and be compatible with the zoning area restrictions for the Airport, as established in the Miami-Dade County Zoning Code.

We recommend close coordination between the Economic Development Council of South Miami-Dade and any future LEDO with the Airport regarding implementation of economic development goals in these areas.

Finally, there are some significant groupings of sites deep in South Dade, bumping up against the edges of the UDB in the agricultural area of the Redland. These sites generally rank low in Tier 2, or fall to Tier 3, due to lack of infrastructure, lack of accessibility and future land use and zoning designation. For these reasons, we see these sites only as potential very long-term reserve sites and believe they should not be considered at this time.

SECTION 5

GOALS, APPROACH & ORGANIZATIONAL/ IMPLEMENTATION CONSIDERATIONS

Through the process of developing a strategic plan for South Dade, the following questions provided guidance for the research that was conducted as part of the study as well as the information gleaned from the community meetings and industry conversations:

- » How do we make South Dade a stronger community where more people can work and not only live and play?
- » What industries should be targeted which create the greatest opportunity for growth both in terms of number of jobs and wages?
- » How do we try to ensure that good jobs, means good jobs for people at every income level? What needs to be done to attract targeted industries?
- » What is/are the organization(s) responsible for attracting and supporting the needs of companies within the target industries?

While prior sections of the Plan have answered some of the questions above, the remainder of this Section, and Section 6 are aimed at providing the guidance on how each question is tackled and what the strategies to achieve objectives should be.

<h1>S</h1> <h2>STRENGTHS</h2>	<h1>W</h1> <h2>WEAKNESSES</h2>	<h1>O</h1> <h2>OPPORTUNITIES</h2>	<h1>T</h1> <h2>THREATS</h2>
<ul style="list-style-type: none"> Diverse community Affordably priced housing Availability of lower cost land Strong sense of community Good quality of life 	<ul style="list-style-type: none"> Lack of infrastructure Lack of economic development focused effort Perceived lack of skills in the workforce 	<ul style="list-style-type: none"> Young, well trained workforce Strong sense of entrepreneurship Building on continued strength of higher wage industries 	<ul style="list-style-type: none"> COVID-19 Negative perception of the area “Brain Drain”

SWOT

Through interviews, review of prior work, etc. associated with the development of this Plan, we have been able to organize the opportunities and challenges facing the region into a series of Strengths, Weaknesses, Opportunities, and Threats. Although these ideas have been gathered during a variety of brainstorming sessions that have been held in South Dade and have not been heavily driven by data, they do provide an indication of how the participants, including residents and business leaders from South Dade, perceive their community and what they foresee for the future.

VISION

Based on the multitude of input from South Dade residents and active participants in the varied sessions that have been held, a Vision Statement for the area has been developed which encapsulates the primary objective for the region.

A community where people desire to live, work and play; where sustainability is a guiding principle and not an afterthought; where the traditional industries of Agriculture, Defense, Health Care, Tourism, and Retail can be maintained and thrive to the level which the global market allows; and, where establishing the foundation for newly emerging industries becomes a reality by making better use of existing and expanded infrastructure.

For more than a decade a core element of the discussion around economic development in South Dade has been the question of a need for an expanded South Dade specific LEDO that is built on the strong foundation of the EDC. Indeed, the implementation of this plan is contingent and organized around the establishment of a strong LEDO, built on the efforts of the existing EDC but more appropriately funded and partnered with government and the private sector.

There is a natural tendency of large businesses from outside of the region to think of Miami as a highly urban center or airport centric region as it relates to the Latin American market and a subsequent logic to orient targeted business attraction efforts to the urbanized areas of the County as a result. South Dade is unique in a Miami-Dade context given its mix of suburban and exurban areas. South Dade needs to target certain users/businesses that are seeking a business environment which South Dade offers which is often separate and distinct from the remainder of county.

ORGANIZATIONAL CONSIDERATIONS

Additionally, South Dade's business community also requires an organization to advocate for its needs with government which are somewhat unique and include:

- » Continued Infrastructure investment and expansion;
- » Continued improvement to the transportation network to drive growth rather than support existing demand;
- » Providing a unique voice for the South Dade area which can be lost given the size of the region; and,
- » Specific focus and support for the Agriculture and Defense industries/communities which have long defined South Dade.

The LEDO can play a key role in **identifying stakeholders, forging partnerships and engaging the wider community around the local economic development process.** The organization is not necessarily organized with a membership component. Rather, the LEDO should work to coordinate with existing organizations and not compete with them for critical resources. The table below highlights the role of the LEDO in relation to other economic development entities.

IMPLEMENTATION CONSIDERATIONS

WHO DOES WHAT?

RESPONSIBILITY	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Large Business Attraction & Retention	✓		✓	✓	
Determine Qualifying Businesses for Incentives		✓	✓	✓	
Provision of Incentives		✓			
Infrastructure Investment		✓		✓	
Small Business Development Support	✓		✓		
South Dade Targeted Marketing Material	✓				
South Dade Data & Information	✓				
Local Industry Advocacy	✓				
Funding of Economic Development Effort	✓	✓			✓

The enhanced LEDO's role should range from that of providing a resource person who provides technical assistance and supporting communities where there is an existing strong local governance infrastructure, to being the key driver of the economic development process in communities where a strong catalyst is needed to bring about broad community and stakeholder engagement. Furthermore, the LEDO must be able to tap into knowledge of the local economy as well as knowledge of the wider national and international economic context.

The enhanced LEDO's primary role will be to foster and support productive relationships and effective partnerships. In an environment of limited time and resources, a LEDO's effectiveness is directly related to its ability to tap into professional and community networks for resources, advice, exchanges, and partnerships. The LEDO will facilitate the process whereby communities identify and act upon economic opportunity. More than that, the LEDO will help build capacity within a community to find collaborative approaches to addressing economic and social challenges.

Figure 32 below provides an initial proposed budget (2020 dollars) for the LEDO organized around a staffing and services component which is adequate to broadly implement and support the economic development objectives and strategies outlined herein. Given the size of the budget, it is likely that a combination of private and County/municipal funding will be required.

Executive Director	\$150,000
Assistant Office Manager	\$45,000
Business Attraction/Outreach Specialist	\$55,000
Benefits/Overhead	\$87,500
Office Rent	\$45,000
Legal/Accounting	\$40,000
Marketing/Public Relations	\$100,000
Research	\$60,000
Travel	\$12,000
Miscellaneous/Memberships	\$6,000
TOTAL	\$625,000

Figure 32: LEDO Initial Budget (2020 dollars)

The lasting impact of an expanded LEDO's work is only partly reflected in specific projects or initiatives. The true legacy of the local economic development process is a stronger, resilient, more self-sustaining community that is able to problem-solve and implement innovative solutions to economic challenges beyond the life of specific projects or interventions.

Regardless of who is leading the process, it is vital that by the end of an initial orientation, participants including both public officials and private or community leaders are able to fully understand and recognize local economic development as:

- » A strategy for wealth creation, jobs and income generation, and, ultimately, alleviation of poverty and improved quality of life.
- » A process that promotes self-help, empowerment, innovation, public-private-civil society sector collaboration, bottom-up planning, and sustainable development incorporating environmental, social, and cultural responsibility with economic development.
- » A potential contributor to the local governance authority's future revenue growth.
- » A purposeful and planned approach to pursuing economic transformation, which is an aspiration inherent in all local governance authorities or communities.
- » A good understanding of local economic development is needed for participants and community members to buy-in to the economic development process and fully cooperate with the strategic planning.

GOALS & OBJECTIVES

A rational economic development strategy and plan cannot be complete without tangible goals and objectives against which to measure success. Indeed, as it relates to economic development strategies the overriding goal is measured by the number of decent paying jobs which are created in sustainable and environmentally sensitive industries in the region. To this end, the plan includes the following goals and objectives:

In the immediate term, a core objective of the Plan is to achieve recovery from the tremendous economic displacement caused by COVID-19 and undertake actions so that employment and business activity in the region can recover to its year end-2019 levels by early 2024.

For those **emerging industries or critical area industries detailed within the plan including Transportation and Warehousing, Finance and Insurance, Professional Services, Health Care and Accommodations and Food Service**, the goal by 2027 is to increase the growth in number of jobs by a multiplier of 1.5 times the recent historic ratio of South Dade vs. countywide jobs for a specific industry. For example, assuming there are currently 2,000 jobs in South Dade in Industry A which is 20% of the County's 10,000 Industry A jobs; if the County's Industry A jobs grows by an additional 5,000 by 2027, then the goal for South Dade is that 1,500 of those jobs will be created in the region (5,000 new Industry A jobs x 20% historic South Dade fair share of Industry A jobs x 1.5 multiplier goal = 1,500 new Industry A jobs in South Dade).

For **long term historic Target Industries, including Agriculture, Retail and Public Administration (Defense)**, the goal is to maintain South Dade employment at current levels through 2027.

Currently, **approximately 175,000 residents of South Dade travel outside of the region every day for work. A secondary goal is to grow the ratio of workforce which lives in the region to work in the region.** Accommodating a significant percentage of these residents with employment opportunities within South Dade has broad implications for improving mobility and quality of life for residents of the area.

A core goal and objective of this strategy is to **promote general wage growth among South Dade workers both through the diversification of industries to traditionally higher wage industries but also by advocating for policies at the county, state, and federal levels.**

The economic development strategy for South Dade is oriented to protecting traditional industries while growing emerging industries which are resilient and friendly to environmental considerations, diversify the economy to create resilience, and promote innovation and high-paying jobs. As an example, industries such as Aviation MRO, which might appear on the surface to be carbon unfriendly, is an industry which is very much oriented today to integrating new technology into planes so that they are more fuel efficient and have the suite of avionics which will enable the planes to participate in significantly advanced routing which in turn reduces carbon emissions.

Finally, a core goal of the strategy is to **support small business creation and enhance the 24-month survival milestone which research indicates is an important threshold for small businesses to be self-sustaining.** This includes businesses that build or leverage emerging technology, which due to the nature of their business are more likely to not be as geographically constrained as in the past. A silver lining from the current pandemic has been the increased willingness of companies of all sizes to allow their workforce to work remotely rather than requiring them to work in traditional office space or campuses. Many of the largest tech companies have given workers at least until the end of 2021 to work from wherever they are. **South Dade, which provides a range of housing choice, a high quality of life, proximity to urban amenities, and one of the nation's most important international hub airports,** Miami International Airport, could be expected to benefit from any fundamental shift in the nature/location of work which may occur as the global economy emerges from the COVID-19 emergency.

SECTION 6

SPECIFIC TARGET INDUSTRY STRATEGIES

To better focus the efforts for six emerging industries and three traditional industries the Project Team has identified as being the strongest candidate industries for future growth in South Dade, or which need to be maintained given their existing importance to the South Dade economy, we have developed a summary of foundations for each industry which can be built upon, a set of specific strategies, and a matrix of the organization which is best suited to undertake the strategy. The core emerging and traditional industries include the following detailed below. It is important to note that a number of the South Dade industries align with the Beacon Council's One Community One Goal target industries which has not always been the case.

Emerging Industries

- » Health
- » Professional Services
- » Tourism Insurance
- » Logistics
- » Aviation

Traditional Industries

- » Agriculture
- » Defense
- » Retail

HEALTH INDUSTRY

BACKGROUND

With the **strongest hospital system in South Florida, Baptist Health, and a stand-alone Jackson Memorial Hospital, South Dade is particularly well positioned to continue to realize growth in the health care sector.** Yet, the health care industry is especially dependent upon national and state policies and competitive positioning. It is crucial that major health care providers have outside regional advocates which can support the goals and objectives of the industry. For example, the biomedical corridor in South Dade was established to leverage the Baptist Health system but, with the exception of Noven Pharmaceuticals, has never had the marketing, grounding, or focus to build upon the base which already exists. Given growth in biomedical in Miami-Dade County overall there is a **strong opportunity to leverage the existing biomedical corridor for future growth.**

SIGNIFICANT EXISTING SOUTH DADE HEALTH ASSETS

As described at their company websites:

Baptist Health South Florida – With more than 1.5 million patient visits every year, **patients and their families from around the world travel to Miami for Baptist Health’s medical expertise.** Approximately **23,000 employees and more than 4,000 physicians** in virtually all specialties, many with national and international reputations, are employed by Baptist Health. All of this and more makes South Florida a **world-class healthcare destination.** Components located in South Dade include:

- » **Baptist Hospital Homestead Hospital**
- » **West Kendall Baptist Hospital**
- » **Miami Cancer Institute**
- » **Miami Cardiac and Vascular Institute**

Jackson South Medical Center – Jackson Health System is a nonprofit academic medical system offering world-class care to any person who walks through its doors. Governed by the Public Health Trust, a team of citizen volunteers acting on behalf of the Miami-Dade Board of County Commissioners, Jackson Health System ensures that all residents of Miami-Dade County receive a single high standard of care regardless of their ability to pay.

Community Health of South Florida, Inc. (CHI) – A nonprofit health care organization providing affordable quality primary and behavioral health care services to the residents of rapidly growing South Florida. CHI operates 11 state-of-the-art primary care centers and 35 school-based programs. All centers offer quality comprehensive

primary and behavioral health care services. Their physicians are board certified or board eligible. Additionally, CHI is accredited by the Joint Commission and is accredited as a Level 3 Patient-Centered Medical Home by the National Committee for Quality Assurance (NCQA). CHI offers a “one-stop-shop” model where the organization and delivery of quality services are seamless, affordable, accessible and culturally sensitive.

Noven Pharmaceuticals – Noven Pharmaceuticals, Inc. is a specialty pharmaceutical company engaged in the research, development, manufacture, marketing, and sale of prescription pharmaceutical products. Noven maintains state-of-the art, FDA-approved transdermal manufacturing facilities in Miami with capacity to produce several hundred million patches per year. These facilities are also approved by the US DEA (Drug Enforcement Agency) for the production of controlled substances.

Preferred Care Partners, Inc. – Preferred Care Partners, Inc, a wholly owned subsidiary of United Health Care, is a Medicare Advantage health plan servicing Broward, Miami-Dade, and Palm Beach counties. They streamline authorization and referral processes and build care provider networks around the needs of their members.

American Care, Inc. – American Care is a healthcare provider that provides direct healthcare services to its patients. American Care is also licensed in Florida as a discount medical plan organization to provide discounted medical services to its Premier Plans members.

CORE HEALTH INDUSTRY STRATEGIES

Core strategies to strengthen the health and pharmaceutical industries in South Dade include the following:

- » Continue to support current South Dade hospital expansion plans with state and federal regulators;
- » Develop collateral material which can be used by hospital administrators and identifies core areas/buildings in South Dade to market to higher wage medical professionals so that they can easily identify high quality housing and medical office options;
- » Work and advocate with county transit and municipality feeder transportation systems to ensure that bi-directional headways and feeder system headways are aligned with South Dade hospital shifts;
- » Provide support and coordinate with Baptist Hospital in its continued expansion as a center for 'medical tourism' for affluent patients in the Americas and Caribbean; and
- » Commence marketing of biomedical corridor through the Beacon Council and Enterprise Florida through the provision of maps and marketing materials specific to the industry.

RESPONSIBILITY	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Continue to support current hospital expansion plans with State and federal regulators	✓		✓		
Develop collateral material which can be used by hospital administrator and identifies core areas/buildings in South Dade to market to higher wage medical professionals so that they can easily identify high quality housing and medical office options	✓		✓		
Work and advocate with county transit to ensure that bi-directional headways and feeder system headways are aligned with South Dade hospital shifts	✓	✓	✓		
Provide support and coordination with Baptist Hospital in its continued expansion as a center for 'medical tourism' for affluent patients in the Americas and Caribbean	✓		✓		
Commence marketing of biomedical corridor through the Beacon Council and Enterprise Florida through the provision of maps and marketing materials specific to the industry	✓		✓		✓

Figure 33. Health Industry Strategy Implementation and Responsibility Matrix

PROFESSIONAL SERVICES INDUSTRIES

BACKGROUND

One of the core advantages of continued advances in technology, including reduced cost, is that it has made professional **services industry nodes somewhat less important. Lawyers, accountants, engineers, and architects no longer need to be co-located with others in their industry to be successful.** Likewise, increased traffic congestion on roadways leading to the traditional office nodes in downtown Miami, Coral Gables, and Doral has increased travel time to and from work negatively impacting economic efficiency, productivity, and quality of life. **Reasonable access to Miami International Airport (MIA) transit to courthouses and downtown, available office space, technology, and an increasingly large local employee base has made South Dade a viable option for professional service companies** that even ten years ago felt the need to be located in Downtown Miami, Coral Gables, or around the Airport. Faced with the increasing traffic congestion and employee productivity loss, executive decision makers who live in Pinecrest, Palmetto Bay, and Kendall are finding that South Dade is an increasingly good alternative to headquarter a business which does not require a specific “address”.

SIGNIFICANT EXISTING SOUTH DADE PROFESSIONAL SERVICES ASSETS

Cole, Scott & Kissane, P.A. – Multi-purpose law firm located throughout the State of Florida. The main office is located in South Dade.

Professional Management, Inc. – Management of 9,000 housing units.

Metric Engineering, Inc. – Metric Engineering, Inc. was founded in 1976. Today, it is among the top consulting engineering firms specializing in civil and transportation projects.

Matrix Construction Group, Inc. – Matrix offers a full line of construction services and has successfully completed a variety of institutional, industrial, commercial, and design/build projects. Matrix Construction is specialized in commercial, industrial and educational new builds and renovations.

CORE PROFESSIONAL SERVICES INDUSTRY STRATEGIES

Core strategies to strengthen the professional services industries in South Dade include the following:

- » Direct mail/email campaign to all attorneys, registered architects, professional engineers, etc. which have their home address south of Kendall Drive, providing information on the professional office space options in South Dade (existing and proposed), existing and projected transit travel times once the BRT is complete from South Dade to Coral Gables, Downtown, and Airport, and the presence of support services required by each profession in the region (i.e. large format printing for architects and engineers or court reporting services for attorneys, etc.);
 - » Maintain updated information through CoStar on the available office buildings, rents, and available space in South Dade;
 - » Work with County and municipalities to identify funding to extend water/sewer infrastructure to key commercial sites as detailed in Section 4 of the Plan;
 - » Work with Miami-Dade College, Florida International University, Miami Dade County Public Schools, and the University of Miami to identify programs which can be strengthened on South Dade campuses to meet the needs of the professional services industries;
 - » Work with real estate industry to establish a shared workspace facility in South Dade targeted to small business start-ups and larger companies which desire to be in proximity to small businesses which include but will not be limited to Professional Service providers;
 - » Coordinate with Chamber South and South Dade Chamber to survey firms in the Professional Services to understand their challenges and growth potential; and
 - » Whenever possible, highlight professional service availability as an asset for attracting new business to South Dade.
- The table below (Figure 34) outlines strategies each partner organization will be responsible for undertaking individually or in concert/partnership with other organizations.

RESPONSIBILITY	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
<p>Direct mail/email campaign to all attorneys, registered architects, professional engineers, etc. which have their home address south of Kendall Drive, providing information on the professional office space options in South Dade (existing and proposed), existing and projected transit travel times once the BRT is complete from South Dade to Coral Gables, Downtown, and Airport, and the presence of support services required by each profession in the region (i.e. large format printing for architects and engineers or court reporting services for attorneys, etc.)</p>	✓	✓	✓		
<p>Maintain updated information through CoStar on the available office buildings, rents, and available space in South Dade.</p>	✓		✓		
<p>Work with County and municipalities to identify funding to extend water/sewer infrastructure to key commercial sites as detailed in Section 4 of the Plan</p>	✓	✓			
<p>Work with Miami-Dade College, FIU, MDCPS, and UM to identify programs which can be strengthened on South Dade campuses to meet the needs of the professional services industries;</p>	✓			✓	
<p>Work with real estate industry to establish a shared workspace facility in South Dade targeted to small business start-ups and larger companies which desire to be in proximity to small businesses which include but will not be limited to Professional Service providers</p>	✓				✓
<p>Work with local chambers to survey firms in the Professional Services to understand their challenges and growth potential</p>	✓				
<p>Highlight professional service availability as an asset for attracting new business to South Dade</p>			✓		

Figure 34. Professional Services Strategy Implementation and Responsibility Matrix

TOURISM INDUSTRY

BACKGROUND

Tourism in South Dade is an industry that is both a traditional industry and an emerging industry. Traditionally, South Dade has enjoyed and benefited from the existence of two national parks that, within the National Park Service structure, hold very esteemed positions due to their unique ecosystems.

Biscayne National Park, which officially became a National Park in 1980, is 270 square miles in size, 95% of which is water. The Park, the only national park that celebrates underwater ecosystems and Florida history as well as upland islands that are historically linked to the Florida Keys, has influenced the manner in which Miami-Dade County has treated land use along the shore. A good deal of the land use along the shore is designated for park and recreation use and conservation. These designations are important to help protect the water quality of Biscayne Bay and ultimately, the National Park.

Everglades National Park, established by Congress in 1934, encompasses 1.5 million acres of one of the world's most diverse ecosystems. It is this diversity that has led to subsequent designations as an International Biosphere Reserve, Wetland of International Importance and a UNESCO World Heritage Site. Because of its size and location adjacent to South Dade's agricultural area, a critical balance is needed to ensure that the park continues to receive the water it needs to survive without flooding the western-most agricultural areas.

These two treasures bookend an area that has recognized the value of nature-based tourism and the activities that traditionally go with this subset of tourism including cycling, kayaking, hiking, birding and other activities that celebrate the natural environment. Miami-Dade County also recognized the value of the natural environment and created park and recreation programs that are anchored by Zoo Miami, the Deering Estate, Redland Fruit and Spice Park, and other natural areas.

Miami-Dade County is in the process of approving a lease and development agreement for the construction of Miami Wilds at Zoo Miami. Miami Wilds is an eco-sensitive project at the front door of Zoo Miami composed of a best-in-class water park, family-friendly lodge hotel, and a number of small unique retail shops and restaurants. Miami Wilds will be linked to Zoo Miami and the heritage Gold Coast Railroad and Miami Military museums by a walkable, interpretive connector trail. Sensitive to nearby natural areas, the 25.5 acre Miami Wilds project, located on public land adjacent to Zoo Miami, is outside of environmentally protected areas. Construction is expected to take 24 months after it begins in 2021 with a projected 2023 opening date.

This project has been pursued by the County for more than 20 years as a means to keep Zoo Miami up to date as a tourism destination and to bring much needed economic activity to South Dade. This project is slated to create 304 jobs at opening and more than 400 jobs over the life of the project. The development agreement commits

the developer to engage local small business, use sustainable construction and operation methods, and partner with the surrounding facilities to promote the wide variety of nature based touristic opportunities available around Zoo Miami and South Dade.

The Greater Miami Convention and Visitors Bureau (GMCVB) is a primary partner for tourism in South Dade. In 2016, the GMCVB underwrote the effort to create the South Dade More to Explore campaign for the purpose of promoting economic activity in the area. The GMCVB has used the tag line to create a webpage dedicated to South Dade and promotional materials have been distributed in markets around the world during Sales Mission meetings intended to promote Miami-Dade County as a tourism destination.

The GMCVB has also created a new campaign for Miami-Dade County that promotes "...Miami's Great Parks and Outdoors" throughout the County. The MIAMILAND campaign promotes Miami-Dade County as one big theme park highlighting the natural areas that are prevalent in South Dade as well as the proximity of these assets to the rest of Greater Miami area.

These campaigns have **shown results relative to the development of new hotels in the South Dade area.** According to the GMCVB's Research Division, by 2022, it is projected that there will be approximately 750 new hotel rooms with an additional 80 rooms to be developed at some point beyond 2022 in South Dade. The MIAMILAND campaign has reached hundreds of travel professionals located in the northeastern United States, Canada, the United Kingdom and Western Europe.

SIGNIFICANT EXISTING SOUTH DADE TOURISM ASSETS

Everglades National Park – The Everglades spans across 1.5 million acres that stretches over the southern part of Florida, but it is easy to access the park's three main areas. The northern section of the park is accessible via Miami or Everglades City and the southern section is accessible through Homestead. Visiting the Everglades allows you to explore a vast diversity of flora and fauna in different ecosystems: freshwater sloughs, marl prairies, tropical hammocks, pinelands, cypress, mangrove, coastal lowlands, marine, and estuarine.

Biscayne National Park – The Park preserves a rare combination of aquamarine waters, emerald islands and vibrant coral reefs all within sight of downtown Miami. Park leadership highlights its advantage of its location next to this growing and diverse metropolis by partnering with a variety of local organizations to provide access for visitors to encounter and explore the scenery, wildlife, history, and other amazing resources.

Redland Fruit & Spice Park – The Fruit & Spice Park was the realization of Mary Calkins Heinlein's vision to create a showcase for the rich agricultural bounty and heritage of the Redland. She came from a family of pioneer homesteaders in Redland which got its name from the reddish color of its soil. Today, the Fruit & Spice Park is a 37-acre subtropical paradise attracting more than 50,000 visitors a year to its gardens and festivals. The Park features more than 500 varieties of exotic fruits, herbs, spices, and nuts around the world and is a defining historic and cultural asset of South Dade.

Deering Estate – The Deering Estate preserves the 1920s era Miami estate of Charles Deering, Chicago industrialist, early preservationist, environmentalist, art collector, philanthropist, and first chairman of the International Harvester Company. Nestled along the coast in South Dade, the Deering Estate is a cultural asset and historic site listed on the National Register of Historic Places. As a 21st Century museum destination for tourists and local residents, a variety of signature events, programs, tours, and classes are offered throughout the year.

Fairchild Tropical Botanic Garden – In 1935, Colonel Robert Montgomery, Dr. David Fairchild, and a core group of passionate plant collectors and horticulturalists including environmentalist Marjorie Stoneman Douglas, County Commissioner Charles Crandon, and landscape architect William Lyman Phillips worked to collect, document, and assemble one of the world's outstanding botanical collections. Opened to the public in 1938, the garden was established on an 83-acre site which was later deeded to Miami-Dade County. An iconic feature of South Dade, the Garden is a member of the Center for Plant Conservation and involved in the preservation of endangered plants in the United States and throughout the tropics. Rated # 1 on Trip Advisor, the Garden provides a living laboratory for scientists and with "it's beautiful paths, vistas, and outstanding horticultural displays, ... provides every visitor with an unforgettable experience."

Zoo Miami – One of the world's great zoos, Zoo Miami houses more than 2,000 wild animals in an environment that closely approximates the animals' natural habitats and gives the visitor the feeling of embarking on an international safari or delving into the Amazon rainforests. Zoo Miami has more than 1,200 trees, plants, and flowers visible from its walkways, adding to its beautiful, relaxing

ambiance. Large, open-air exhibits allow visitors to enjoy beautiful and endangered wildlife at a safe yet remarkably close range. With 340 developed acres on a 740-acre parcel of land, Zoo Miami is the only zoo in the continental United States located in a subtropical climate.

Pinecrest Gardens – Pinecrest Gardens, South Florida's Cultural Arts Park, located at the former home of Parrot Jungle, features more than 1,000 varieties of rare and exotic tropical plants and palm trees in a native tropical hardwood and cypress setting. This dramatic landscape is enhanced with natural streams, caves and fissures which provides an entertainment and cultural destination among historically designated structures and buildings.

Coral Castle Museum – Coral Castle Museum's main feature is a sculpture garden in stone, built by one man, Edward Leedskalnin. From 1923 to 1951, Ed single-handedly and secretly carved over 1,100 tons of coral rock, and his unknown process has created one of the world's most mysterious accomplishments. One of the great tourism destinations in the 1940s, features of the Coral Castle Museum includes a 9-ton gate that can be moved with one finger, functioning rocking chairs, and a Polaris telescope all made entirely of stone. There has been much speculation about the mysterious Edward Leedskalnin, a man weighing 100 pounds and just over 5 feet tall, and how he was able to build the Castle from the ground up.

Monkey Jungle – Located just off US 1 and the Florida Turnpike, Monkey Jungle "Where Humans are Caged and Monkeys Run Wild!" was founded by Joseph DuMond in 1935. Joseph DuMond was an innovator of many of the concepts seen today in the design of zoological parks. Today it is a research institution and visitor destination with

more than 300 primates, most running free on a 30 acre preserve. Now in its third generation of family ownership, Monkey Jungle remains one of the truly timeless attractions in South Florida.

MDM Hotel Group, LTD – The group, located in South Dade, entered the hospitality market with the acquisition of the Miami Marriott Dadeland in 1990. Subsequently the group developed the Courtyard by Marriott Dadeland in 2004 as part of this innovative complex. These transactions stimulated a transformation of the neighborhood they were located into a vibrant business, retail, and hospitality center. Similarly, the group's development of the JW Marriott Hotel Miami and Barclay's Financial Center in 1998 was the stimulus for a record setting decade of development in the Miami downtown Brickell Corridor.

Schnebly Redland's Winery & Brewery – Located in the heartland of Miami's farm-to-table culinary movement, stands Schnebly Redland's Winery & Brewery. In an expansive estate in the farmland, Peter Schnebly, a farmer, packager and founder of the winery, creates wines out of local tropical fruit. As a farmer, Schnebly grew frustrated at the idea of throwing away fruit that could not be sold because of slight blemishes. Following consultation with boutique winemaker Bill Wagner, Schnebly went on to produce his first wine in 2004 and built a flourishing winery. He later went on to create a brewery which produced its first batch in 2012. A true destination point, Schnebly's also offers tours, tastings, and a memorable location for weddings and special events.

Robert is Here – Robert Is Here is a family-owned and operated fruit stand in Homestead, Florida specializing in rare and exotic tropical fruits and fresh tropical fruit milkshakes, mostly from fruit grown in the Redland. The Robert is Here Fruit Stand was established in 1959 when six-year-old Robert was placed on the corner of present-day location with some of his father's cucumber crop and told to sell them. As the story goes according to their Facebook Page, Robert sat all day Saturday and no one even stopped. That evening, Robert's father decided that people must not see the little boy and so he created a sign with big red letters stating "Robert is Here." The rest is history. Today it has grown into a complete tourist destination equipped with an animal farm, play area, and picnic tables.

Knaus Berry Farm – Similar to the story of Robert is Here, Ray and Russell Knaus began raising strawberries in the Redland in 1956. The set up a small roadside stand near the current Knaus Berry Farm location to sell their strawberries. The idea of a bakery was born when a produce broker commented that the cookies baked by Ray's wife Barbara were good enough to sell. Over the years, strawberries, assorted bake goods, jams and jellies, vegetables, ice cream, as well as U-pick strawberries and tomatoes, have made Knaus Berry Farm a destination for residents and tourists alike.

CORE TOURISM INDUSTRY STRATEGIES

- » Continue to coordinate with the Greater Miami Convention and Visitors Bureau (GMCVB) to implement the “MIAMILAND” & “More to Explore” marketing campaigns.
- » Whenever possible, participate with GMCVB in sales trips that promote South Dade.
- » Periodically, the GMCVB develops co-operative marketing programs in partnership with Expedia and other national travel programs. Local hotels and tourism venues should be encouraged to participate in these programs.
- » Advocate for zoning and other land use

changes which allow lower density hospitality and low impact touristic activities outside of the UDB.

Below (Figure 35) is an implementation that provides guidance regarding which organizations have a role in fulfilling the recommended Implementation Strategy.

RESPONSIBILITY	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Continue to coordinate with the Greater Miami Convention and Visitors Bureau (GMCVB) to implement the “MIAMILAND” & “More to Explore” marketing campaigns.	✓				✓
Whenever possible, participate with GMCVB in sales trips that promote South Dade.	✓				✓
Periodically, the GMCVB develops co-operative marketing programs in partnership with Expedia and other national travel programs. Local hotels and tourism venues should participate in these programs.	✓				✓
Advocate for zoning and other land use changes which allow lower density hospitality and low impact touristic activities outside of the UDB.	✓	✓			✓

Figure 35. Tourism Strategy Implementation and Responsibility Matrix

INSURANCE INDUSTRY

BACKGROUND

Insurance is a rapidly growing industry in South Florida and South Dade has always had an important base of insurance companies due to the fact that American Banker's insurance, one of the largest renter insurance providers in the nation, was founded and headquartered in the region. Adding to American Banker's (now part of the international Assurant group) is AvMed corporation, a Florida based major health insurer located in the Dadeland area and Baptist Hospital a major health care provider that principally relies on insurance for revenue. Insurance continues to be a specialized industry that requires certain skill sets (i.e. actuaries, insurance assessors, investigators) which for training and other purposes continue to be important to be collocated in a common region.

SIGNIFICANT EXISTING SOUTH DADE INSURANCE ASSETS

AvMed – AvMed is one of Florida's oldest and largest not-for-profit health plans, providing Medicare Advantage coverage in Broward and Miami-Dade counties, Individual and Family coverage in Miami-Dade, Broward, and Palm Beach, and coverage for Employer Groups in more than 30 counties across the state.

Assurant (American Bankers) – Assurant is a holding company for various underwriting entities that provide Renters Insurance and Resident Liability Insurance.

Baptist Health South Florida – With more than 1.5 million patient visits every year, patients and their families from around the world travel to Miami for our medical expertise. Approximately 23,000 employees and more than 4,000 physicians in virtually all specialties — many with national and international reputations. All of this and more makes us South Florida's world-class healthcare organization.

CORE INSURANCE INDUSTRY STRATEGIES

- » Engage insurance industry executives in major South Dade companies to participate in Economic Development efforts and to promote the industry in South Dade which has not occurred to date.
- » Offer support in efforts in Tallahassee to strengthen Insurance industry's position in Florida and development of incentives for new companies which are seeking to relocate to the State.
- » Develop unique marketing package for insurance providers including information on available land for campus development and large block of office space in South Dade which might accommodate their needs.
- » Work with Miami-Dade College, FIU, MDCPS, and UM to identify programs which could be strengthened to meet the needs of the insurance Industry.

The table below (Figure 36) outlines strategies each partner organization will be responsible for undertaking individually or in concert/ partnership with other organizations.

RESPONSIBILITY	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Engage insurance industry executives in major South Dade companies to participate in Economic Development efforts and to promote the industry in South Dade which has not occurred to date.	✓	✓			
Offer support in efforts in Tallahassee to strengthen Insurance industry’s position in Florida and development of incentives for new companies which are seeking to relocate to the State.	✓	✓	✓		
Develop a unique marketing package for insurance providers including available land and large block of office space in South Dade which might accommodate their needs.	✓			✓	
Work with Miami-Dade College, FIU, MDCPS, and UM to identify those programs which could be strengthened to meet the needs of the insurance industry.	✓				✓

Figure 36. Insurance Strategy Implementation and Responsibility Matrix

LOGISTICS

BACKGROUND

Miami-Dade County has long been a major logistics and trade center with particular focus on Latin America and the Caribbean. All indications are that the logistics industry will continue to experience growth. However, available dry and cold storage and logistics space has become incredibly scarce in the County as land values in the central and northern subregions of the County have made the development of logistics facilities almost prohibitive. South Dade lower cost of land is now affordable enough in comparison to other areas of the county to offset the additional cost of trucking incurred by major users and tenants.

The transfer of surplus property to the county from the U.S. Air Force has provided the opportunity to diversify the local economy through the sale of land for the establishment of logistics facilities developed by Federal Express and Amazon. Federal Express purchased approximately 50 acres for \$38M for the development of a FedEx Ground station which opened in 2018 with 170 employees. Recently, Amazon purchased 76 acres in the same area for the development of distribution center and warehouse for \$22.0M. It is projected that this facility will house 325 permanent jobs.

SIGNIFICANT EXISTING SOUTH DADE LOGISTICS ASSETS

Miami Executive Airport – According to the Miami-Dade Aviation Department (MDAD), Miami Executive Airport (TMB) is one of the busiest general aviation airports in Florida, serving corporate, recreational, flight training, and governmental agency activities. Miami Executive Airport is just 15 minutes from the business centers of South Miami-Dade County. As a reliever to Miami International Airport, its location also provides fast and easy access to the Florida Turnpike, Ocean Reef, the Florida Keys as well as the recreational and business activities in Miami and Miami Beach. The airport provides modern, efficient, and professionally staffed fixed-base operator (FBO) facilities serving the expanding corporate and business interests of South Florida.

FedEx Ground South Dade – Opened in 2018, this center located on land that was previously a part of Homestead Air reserve Base serves as a logistics hub for FedEx Ground operations in the South Dade area.

Amazon Distribution Center – The warehouse could be Amazon's largest distribution center in South Florida, according to the Herald. Amazon plans to invest \$80 million at the property. About 25 percent of the funds used to purchase the site will go to the Miami-Dade Affordable Housing Trust Fund, and the remainder will go toward the Homestead Air Reserve Base Fund.

Foreign Trade Zone No. 166 – Foreign Trade Zone 166 Vision FTZ 166 is a General-Purpose zone located in east Homestead. It is the southernmost free trade zone in the continental United States and provides a unique opportunity for Latin American operations.

CORE LOGISTICS INDUSTRY STRATEGIES

- » Work with county and municipalities to identify funding to extend water/sewer infrastructure to key commercial/industrial sites not yet served.
- » Prepare a package which shows available land and pricing of land in South Dade vs. other parts of the Miami-Dade region. Despite distance from major population centers, South Dade is increasingly a viable option for logistics companies given land and space pricing elsewhere in the county.

- » Build strategy to work with federal, state and local government to transition HARB to a joint use facility which over long term may support air cargo operations.
- » Work and advocate with county transit to ensure that bi-directional headways and feeder system headways are aligned with South Dade logistic company shifts.
- » Work with Miami-Dade County to extend Foreign Trade Zone (FTZ) 281 to cover all of Miami-Dade County as a way to apply FTZ benefits across the entire county.
- » Similar to the model in Albuquerque, NM, work with government to designate key development zones in South Dade principally in Homestead area which are designated for warehouse/logistics development and would have priority for infrastructure improvement.

The table below (Figure 37) outlines strategies each partner organization will be responsible for undertaking individually or in concert/ partnership with other organizations.

RESPONSIBILITY	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Work with county and municipalities to identify funding to extend water/sewer infrastructure to key commercial/industrial sites not yet served	✓	✓			
Prepare a package which shows available land and pricing of land in South Dade vs. other parts of the Miami-Dade region. Despite distance from major population centers, South Dade is increasingly a viable option for logistics companies given land and space pricing elsewhere in the county.	✓		✓	✓	
Build strategy to work with federal, state and local government to transition HARB to a joint use facility which over long term may support air cargo operations.	✓	✓			✓
Work and advocate with county transit to ensure that bi-directional headways and feeder system headways are aligned with South Dade logistic company shifts.	✓				
Work with Miami-Dade County to extend Foreign Trade Zone (FTZ) 281 to cover all of Miami-Dade County as a way to apply FTZ benefits across the entire county.	✓				✓
Similar to the model in Albuquerque, NM, work with government to designate key development zones in South Dade principally in Homestead area which are designated for warehouse/ logistics development and would have priority for infrastructure improvement.	✓	✓			

Figure 37. Logistics Strategy Implementation and Responsibility Matrix

AVIATION INDUSTRY

BACKGROUND

Aviation has had a long history of providing economic benefit to Miami-Dade County and South Dade.

Growth in jobs in the Transportation and Warehousing industry sector, which includes Aviation, is project to grow to 84,089 jobs by 2027 in Miami-Dade County. This represents a growth of 7,289 jobs or 9.5% over 2019 employment numbers.

The strength of this sector is due, in part to the various, significant assets that define the Aviation industry in South Dade. These assets include:

Miami Executive Airport – According to the Miami-Dade Aviation Department (MDAD), Miami Executive Airport (TMB) is one of the busiest general aviation airports in Florida, serving corporate, recreational, flight training, and governmental agency activities. Miami Executive Airport is just 15 minutes from the business centers of South Miami-Dade County. As a reliever to Miami International Airport, its location also provides fast and easy access to the Florida Turnpike, Ocean Reef, the Florida Keys as well as the recreational and business activities in Miami and Miami Beach. The airport provides modern, efficient, and professionally staffed fixed-base operation (FBO) facilities serving the expanding corporate and business interests of South Florida.

Miami Homestead General Aviation Airport – Situated approximately three miles northwest of the City of Homestead, Miami Homestead General Aviation Airport (X51) offers quick and easy access with no landing fees. The airport is adjacent to Everglades National Park and is only 25 minutes from Biscayne National Park's coral reefs. Miami Homestead General Aviation Airport is the closest airport to the Homestead/Miami Speedway in the agricultural community -- minutes west of the business areas of South Dade and the City of Homestead. Additionally, the airport provides a convenient link to all of the Florida Keys and is a short 30-minute drive from Key Largo and the Ocean Reef Club, famous for their world-class sport fishing and incredible coral reefs. Providing self-service Jet-A and 100LL fuel, Miami Homestead General Aviation Airport is the last refueling stop before the Florida Keys and points south. With its two paved and lighted runways, one Ultralight turf runway, Aerobatic box and Skydive drop zone, the airport serves all aspects of the general aviation community from business aircraft to skydiving and gliding.

Eig-Watson School of Aviation (Miami-Dade College) – Miami-Dade College Homestead Campus is the home of the Eig-Watson School of Aviation. This program offers associate degrees and certificate programs in a variety of disciplines including Aviation Administration, Air Cargo management, Transportation and Logistics and Global Logistics. The MDC School of Aviation has a partnership agreement with the local flight school Wayman Aviation and Pan Am International Flight Academy. In accordance with FAA regulations, the school operates under Part 141 certification and approval.

In addition to the economic activity that is generated through the airports, the growth in jobs in this sector is expected to occur through the maintenance, repair, and operations sector of the industry. According to the Beacon Council, Miami-Dade has attracted leading aviation MRO (maintenance, repair, operations) providers from around the world due to the county's access to international markets, creating one of the largest MRO cluster of companies in the U.S. It should be noted that several of the major companies engaged in MRO are located in South Dade.

CORE AVIATION INDUSTRY STRATEGIES

- » Work with MDAD and Beacon Council's Aviation Committee to further market Miami Executive Airport to support MRO operations.
- » Coordinate with South Florida Defense Alliance team to engage USAF associated with commercial MRO opportunities for local companies at HARB.
- » In conjunction with the County, State, and Beacon Council, support and advocate for a modification to the record of decision which allows an evolution of HARB into a joint use base which can support MRO and private air cargo activities.
- » Work with local schools, technical programs, and universities to fully understand the aviation related programs and enrollment in the programs in order to provide background information to potential aviation related companies interested in locating operations in South Dade.
- » Engage with MDAD, MDC, FIU, and Beacon Council over long term to determine the viability of establishing a similar center to the Georgia Center of Innovation for Aerospace in and around either Miami Executive Airport or HARB.

The table below (Figure 38) outlines strategies each partner organization will be responsible for undertaking individually or in concert/ partnership with other organizations.

RESPONSIBILITY	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Work with MDAD and Beacon Council’s Aviation Committee to further market Miami Executive Airport to support MRO operations.	✓		✓		
Coordinate with South Florida Defense Alliance team to engage USAF associated with commercial MRO opportunities for local companies at HARB.	✓				✓
In conjunction with the County, State, and Beacon Council, support and advocate for a modification to the record of decision which allows an evolution of HARB into a joint use base which can support MRO and private air cargo activities.	✓	✓	✓	✓	
Work with local schools, technical programs, and universities to fully understand the aviation related programs and enrollment in the programs in order to provide background information to potential aviation related companies interested in locating operations in South Dade.	✓				✓
Engage with MDAD, MDC, FIU, and Beacon Council over long term to determine the viability of establishing a similar center to the Georgia Center of Innovation for Aerospace in and around either Miami Executive Airport or HARB.	✓				✓

Figure 38. Aviation Strategy Implementation and Responsibility Matrix

AGRICULTURE INDUSTRY

BACKGROUND

Miami-Dade County leads the state in the production of tropical vegetables, tropical fruits and ornamental nurseries, and ranks second in the production of winter vegetables and ornamental fish with a total economic impact of \$2.7 billion.

Approximately 20,000 persons are directly or indirectly employed by Miami-Dade County's agricultural industry with most of this economic and employment activity occurring in South Dade.

Agriculture in South Dade faces challenges related to offshore competition and the demand for developable land. According to the 2019-2025 Strategic Plan issued by UF/IFAS Tropical Research and Education Center, other challenges include:

Increased introduction of crops grown and disease pests. Increased environmental regulations and associated costs. Increase labor and other input costs.

The recommendations contained in this plan reflect the input of the UF/IFAS TREC as well as local farmers. Consistent with TREC's Strategic Plan, agriculture can survive its challenges provided new methods and innovations are devised to counter the threats.

Furthermore, local policies regarding agriculture need to look beyond land use policies and, collectively, local economic development policies need to focus on how to make the agricultural industry and its products more marketable, how to improve the supply chain, how to make the industry more sustainable through additional research, development of new plant materials

and the introduction of more innovative ways to manage the agricultural process.

Agriculture in South Dade is also a major contributor to the nature-based tourism movement that entices our neighbors from other parts of Miami-Dade County and tourists from outside of the County to visit South Dade to sample tropical fruits, purchase orchids and ornamental plants, and enjoy a more relaxed environment. This tourism movement is supported by the Greater Miami Convention and Visitors Bureau especially through their MIAMILAND campaign. Without a viable and diverse agricultural industry, this tourism opportunity may not exist.

SIGNIFICANT EXISTING AGRICULTURE ASSETS

Agriculture in South Dade benefits from strong partners who have been engaged in the industry for decades as well as new partners that are bringing innovation to South Dade; they include:

Atlantic Sapphire Salmon Farm – Atlantic Sapphire is pioneering Bluehouse® salmon farming locally, and transforming protein production globally. Atlantic is currently building the world's largest Bluehouse in Homestead, Florida, a location that has been identified as ideal for large-scale Bluehouse salmon farming. The first phase of the project is nearing completion, and they will be delivering Florida-grown Atlantic salmon to U.S. consumers starting in 2020.

Brooks Tropicals Holding, Inc. – This grower of tropical fruits and vegetables has been operating since the early 1900s. Today, they grow avocados, starfruit, passionfruit, dragonfruit, lychees, mamey, jackfruit, and papayas in South Dade and in Central America.

Costa Farms – Costa Farms is one of the largest horticultural growers in the world. The company started in 1961 when founder, Jose Costa Sr., purchased 30 acres south of Miami to grow tomatoes in the winter and calamondin citrus in the summer. That soon morphed into houseplants, and Costa Farms started innovating and introducing ornamental plants. Today they grow more than 1,500 varieties of houseplants.

R.F. Orchids – South Florida’s oldest and largest orchid nursery. R.F. Orchids is known internationally for the variety of orchids and their standing in the orchid industry.

Gulf Stream Tomato Packers – Gulfstream Tomato Packers is part of the Farm Support Services Industry. Gulfstream Tomato Packers has 300 total employees across its locations and generates \$11.8 million in sales.

Dade County Farm Bureau – Miami-Dade County’s oldest and largest agricultural organization, the Dade County Farm Bureau was the first county Farm Bureau established in Florida. For over 75 years, the DCFB has been an integral part of the agricultural community, bringing farmers together to solve issues collectively. The Dade County Farm Bureau has over 900 grower members, making it the largest agricultural organization in Miami-Dade County.

UF Tropical Research and Education Center – The Tropical Research and Education Center (TREC) of the Institute of Food and Agricultural Sciences (IFAS), University of Florida (UF) is located in Homestead, Florida about 30 miles (48 km) south of Miami. The Center was established in 1929 by an act of the state legislature, on land donated by the Krome family. TREC has long been recognized locally, regionally, and internationally for basic and applied research in the areas of tropical fruit crop biotechnology, environmental stress and plant reproductive physiology, entomology, plant pathology, and horticulture in a warm subtropical environment.

CORE AGRICULTURE INDUSTRY STRATEGIES

- » Advocate for additional housing for graduate students working at the UF Tropical Research and Education Center. Research performed by graduate students allows new crops to be placed in the hands of farmers quicker.
- » Assist the farm community strengthen the supply chain for the production of new products resulting from new agricultural crops, i.e., the production of vanilla by supporting the development of plants and packing houses.
- » Work with the farm bureau to expand knowledge of innovation efforts in Agriculture through transfer of knowledge from other areas of the United States and world.
- » Encourage changes to rules which will allow the continued evolution of farms to provide the facilities to support agritourism in the region.

The table below (Figure 39) outlines strategies each partner organization will be responsible for undertaking individually or in concert/ partnership with other organizations.

RESPONSIBILITY	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Students working at the UF Tropical Research and Education Center. Research performed by graduate students allows new crops to be placed in the hands of farmers quicker.	✓	✓	✓	✓	
Assist the farm community strengthen the supply chain for the production of new products resulting from new agricultural crops, i.e., the production of vanilla by supporting the development of plants and packing houses.	✓		✓	✓	
Work with the farm bureau to expand knowledge of innovation efforts in Agriculture through transfer of knowledge from other areas of the United States and world.	✓	✓	✓	✓	✓
Encourage changes to rules which will allow the continued evolution of farms to provide the facilities to support agritourism in the region.	✓			✓	

Figure 39. Agriculture Strategy Implementation and Responsibility Matrix

DEFENSE INDUSTRY

BACKGROUND

The Defense Industry in South Dade has historically been one of the three legs of the 3-legged stool that defined the region's economic activity. Like agriculture and tourism, defense related economic activity defined the South Dade as a Defense-friendly community that rallied around the base and provided support to the individuals assigned to the base. This changed in 1992 with the impact of Hurricane Andrew and the subsequent 1993 decision by the Base Realignment and Closure Commission to downsize Homestead Airforce Base to an Air Reserve Base. This change in status eliminated the Defense housing, hospital, commissary, and recreational facilities that served the active duty and substantial Defense retiree community that called South Dade home. As a result of the hurricane damage and the change in base status, the retiree community population dropped substantially.

In 2004, the Department of Defense and Miami-Dade County came to agreement on the transfer of 766 acres of surplus federal property to the County for economic development and job creation purposes provided that commercial aviation would not be one of the activities. Furthermore, the base has rebounded reporting that the base continues to be a major contributor to the economic growth of South Florida, generating over \$331 million into the local economy in fiscal year 2018, which represents a 50 percent increase since 2008, according to the base finance office. Furthermore:

The economic activity at the base includes more than \$185 million in construction, services, and material contracts that were awarded to mainly local businesses in 2019. The economic increase is approximately \$18 million more than in 2018. The base's total economic impact has doubled since 2003 with no signs of slowing down.

Currently, the base employs over 1,400 full-time employees who live in the Homestead and South Dade communities and another 1,700 Air Force reservists who drill monthly at the base. The 482nd Fighter Wing, an Air Force Reserve unit, is the installation host.

Homestead ARB's total payroll for FY 2018 is in excess of \$99 million. The estimated number of indirect jobs created is 837.

The Defense presence also directly impacts the local economy through many subtle, yet important, contributions. Auto fleet maintenance, linen and laundry service, purchases from local beverage distributors, grounds maintenance, and contracted electrical, painting and plumbing work are other examples of the direct economic impact on the local community, totaling in the millions of dollars.

The base spent more than \$559,000 in FY 2018 on local hotels. Many reservists stay off base in Homestead and Florida City during monthly unit training assemblies.¹

Over the years, as a result of the advocacy provided by the Beacon Council Defense program and Miami-Dade County, the location of **additional Defense units adjacent to HARB but within the County-owned property, including the Special Operations Command Headquarters and U.S. Coast Guard Miami Safety and Security Team, have assisted in securing the long-term viability of the base.**

The location of **Homestead Air Reserve Base in South Dade provides the opportunity for a partnership with Miami-Dade County for use of the airfield. Joint Use would allow the investment of Federal Aviation Administration funding, as well as County Aviation funds, in the maintenance of HARB's 11,000 linear foot runway and related taxiways,** thus relieving the Base of bearing the full brunt of airfield maintenance. In return, Joint Use would also allow access to general aviation to use of the airfield for landing and takeoff.

Prior to September 11, 2001, joint use of the airfield was permitted for General Aviation uses and Miami-Dade County Aviation managed the fixed based operation on land adjacent to the runway which was controlled by the County. After 911, the Air Force eliminated the joint use due to post-911 heightened security issues. These restrictions were relaxed by the Air Force in the early 2000s.

In 2015 the Board of County Commissioners passed a **resolution directing the County Mayor to negotiate with HARB for limited, civilian Joint Use at HARB.** These negotiations are currently underway and the agreement will be signed upon identification of the location for the Fixed Base Operator. Upon execution of the agreement,

it is currently estimated by the Aviation Department that the Fixed Base Operator could cost approximately \$50 million and take 2 years to complete. The **establishment of a Joint Use at HARB for civilian use could open the door for more commercial aviation uses such as MRO and limited cargo operations which are now prohibited at the land adjacent to HARB.**

South Dade is home to significant Defense assets that represent different branches of the United States Department of Defense and the Department of Homeland Security. Below is a brief description of these assets:

Homestead Air Reserve Base – The 482nd Fighter Wing (FW), the host unit of Homestead ARB, supports **contingency and training operations** of U.S. Southern Command and a number of tenant units, including Headquarters Special Operations Command South, the U.S. Coast Guard Maritime Safety and Security Team, and an air and maritime unit of U.S. Customs and Border Protection. In addition, Homestead ARB is home to the most **active North American Aerospace Defense Command (NORAD) alert site in the continental United States, operated by a detachment of F-15 fighter interceptors from the 125th FW of the Florida Air National Guard. The 482nd FW continues to provide the Department of Defense with an efficient, cost-effective air reserve base on the rim of the Caribbean Basin. Its strategic presence at the southernmost tip of the continental United States provides an invaluable platform from which to launch its full range of capabilities.** Poised to protect and defend, readiness is its primary mission.²

Special Operations Command South (SOCSOUTH) – SOCSOUTH supports the USSOUTHCOM Strategy of Cooperative Regional Peacetime Engagement by providing SOF capabilities that assist in shaping the theater’s security environment, while ensuring appropriate forces are postured to respond when U.S. interests are threatened. Toward this end, SOCSOUTH manages over 200 SOF deployments annually, averaging 42 missions in 16 countries at any given time.³

U.S. Coast Guard Engineering Unit (in support of U.S. Coast Guard District 7) – Located on approximately 100 acres adjacent to Zoo Miami, the Engineering Unit manages the communications facility for USCG District 7 as well as providing administrative support to District 7 personnel in the areas of housing, transportation, and other support services.

Luis Martinez Army Reserve Unit – This Army Reserve Unit is located on 10-acres of federal property adjacent to Zoo Miami. The facility house 12 units of the U.S. Army Reserve that provide training to reservists assigned to medical companies, transportation detachments, engineering companies, and civil affairs battalions.

CORE DEFENSE INDUSTRY STRATEGIES

- » Implement recommendations from The Beacon Council’s Defense Reinvestment Grant (DRG) funded strategy, including treating defense related industries as a targeted industry in order to capture rising Defense expenditures, especially in the State of Florida. The areas of focus should include Cybersecurity, Health IT, Aircraft MRO, and Parts Logistics IT.
- » Strengthen the relationship with the South Florida Defense Alliance.
- » The LEDO should strengthen and, if necessary, re-establish relationships with Defense installations located in Miami-Dade County and especially, South Dade.
- » The LEDO should advise Miami-Dade County regarding this effort through the County’s Defense Affairs Advisory Board.
- » Advocate for beddown of F-35 squadron.
- » Advocate for the location of the Spacecom Headquarters in South Dade.
- » Monitor the progress of the request from Miami-Dade County to HARB to enter into a Joint Use to allow limited commercial use at HARB.

1. Source: <https://www.homestead.afrc.af.mil/About-Us/Fact-Sheets/Display/Article/700488/homestead-air-reserve-base-economic-impact/>

2. Source: <https://www.homestead.afrc.af.mil/Portals/134/Documents/History>

3. Source: <https://www.globalsecurity.org/Defense/agency/dod/socsouth.htm>

The table below (Figure 40) outlines strategies each partner organization will be responsible for undertaking individually or in concert/ partnership with other organizations.

RESPONSIBILITY	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Implement recommendations from The Beacon Council’s Defense Reinvestment Grant (DRG) funded strategy, including treating defense related industries as a targeted industry in order to capture rising Defense expenditures, especially in the State of Florida. The areas of focus should include Cybersecurity, Health IT, Aircraft MRO, and Parts, and Logistics.	✓	✓			
Strengthen the relationship with the South Florida Defense Alliance.	✓				
The EDC should strengthen and, if necessary, re-establish relationships with Defense installations located in Miami-Dade County and especially, South Dade.	✓				✓
The EDC should advise Miami-Dade County regarding this effort through the County’s Defense Affairs Advisory Board.	✓	✓			
Advocate for F-35 squadron beddown at Homestead Air Reserve Base.	✓	✓	✓	✓	✓
Advocate for the location of the Spacecom Headquarters in South Dade.	✓	✓	✓	✓	
Monitor the progress of the request from Miami-Dade County to HARB to enter into a Joint Use to allow limited civilian use at HARB.	✓	✓	✓	✓	

Figure 40. Defense Strategy Implementation and Responsibility Matrix

RETAIL INDUSTRY

BACKGROUND

As a source of employment, approximately 10.9% of the workforce in South Dade is employed in some form of retail in the area. As a result, **retail is a core industry that needs to be part of any economic development strategy for the region.** In light of the evolution in retail that has been seen throughout the country and accelerated during the pandemic, **special attention needs to be focused on retail to ensure that jobs are not lost and the real estate footprint that supports retail remains viable.**

The recommendations that are contained in this section resulted from consultation between the Project Team and the businesses that are engaged in retail in South Dade, primarily the major malls and representatives of the real estate community. The practitioners involved in retail agreed that while retail is changing, the market is still strong and is evolving into an industry that is much more interdependent with housing development, tourism, and food service than it had been in the past. Our recommendations reflect the **growing interdependency and the need to view retail spaces as a place for the community to come together for events as well as shopping.**

SIGNIFICANT RETAIL ASSETS

South Dade is fortunate to have some of the more significant assets in Miami-Dade County in the project area. Below is a brief description of the assets:

Dadeland Mall – Dadeland Mall, Miami’s original and most iconic shopping center is anchored by Florida’s largest Macy’s, as well as Macy’s Home Gallery & Kids, and other major retailers. Shops and dining destinations span more than 1.4 million square feet and features more than 185 retail stores and restaurants.

The Falls Miami – The Falls is a shopping, dining and entertainment destination for families in South Florida. The 55-acre shopping center and tourist destination is home to more than 100 specialty stores, restaurants, and cafés as well as The Fresh Market.


Southland Mall – Southland Mall, formerly known as Cutler Ridge Mall, opened in 1978 as an extension of the Cutler Ridge Shopping Center, which opened in 1960. The mall was devastated by Hurricane Andrew in 1992, reopened the following year and was renamed Southland Mall in 2003. Southland Mall houses 71 retailers, including Ross Dress For Less, Sephora, and Men’s Wearhouse, along with 18 casual/fast-food restaurants such as Applebee’s and Teriyaki Ninja. The mall is also home to Regal Southland Mall cinema.

Florida Keys Outlet Marketplace – Florida Keys Outlet Marketplace is an open-air center that serves the nearby communities of Key Largo, Homestead, and Kendall. Located at the end of the Florida Turnpike on U.S. 1, the Florida Keys Outlet Marketplace houses over 50 retailers ranging from women’s apparel to shoes to children’s apparel.

The Palms at Town & Country – Located in the West Kendall area of South Dade, The Palms at Town & Country provides an over 70 nationally recognized stores, eclectic shops, and dining options that showcase unique local and regional flair.

Interfoods of America, Inc. (fast food operator) – Interfoods of America is the largest U.S. franchisee of Popeyes restaurants with about 140 locations in seven states (mostly Florida). The restaurants are operated through the company’s wholly owned subsidiary Sailormen Inc. Jointly, both companies have over 5,700 employees.

CORE RETAIL INDUSTRY STRATEGIES

- » Partner with local mall owners and real estate professionals to assist with marketing of available retail spaces.
- » Encourage more community use of existing malls.
- »  **Develop site selector tours** (virtual and in-person) of retail properties available for re-development.
- » Support land use, zoning and incentives to support repositioning of malls and retail centers which are transitioning as a result of major market shifts.
- » Work with local education and training programs to encourage more soft-skills training for retail personnel.

The table below (Figure 41) outlines strategies each partner organization will be responsible for undertaking individually or in concert/ partnership with other organizations.

RESPONSIBILITY	South Dade Economic Development Organization/Business Community	County & Municipal Government	Beacon Council	Enterprise Florida & State	EDA & Regional Partners
Partner with local mall owners and real estate professionals to assist with marketing of available retail spaces.	✓	✓	✓		
Encourage more community use of existing malls	✓	✓	✓		
Develop site selector tours (virtual and in-person) of retail properties available for re-development.	✓	✓	✓		
Support land use, zoning and incentives to support repositioning of malls and retail centers which are transitioning as a result of major market shifts			✓		
Work with local education and training programs to encourage more soft-skills training for retail personnel.	✓		✓		✓

Figure 41. Retail Strategy Implementation and Responsibility Matrix

SECTION 7

ESTIMATED ECONOMIC & FISCAL IMPACTS OF IMPLEMENTING STRATEGY (REMI)

An economic and fiscal impact simulation predicts the economic and fiscal effects of one or more interventions occurring on the local economy caused by activities such as new business, project venture, government policy, environmental regulations, and other changes. The following is an effort to estimate the possible economic and fiscal impact of the South Dade economic development on Miami-Dade County through 2027. Specifically, three employment growth scenarios under various economic development strategies were simulated in this report: Scenario A - no intervention, Scenario B - moderate intervention, and Scenario C - significant Intervention (Figure 42).

The following simulations were conducted using REMI Tax-PI to forecast the economic and fiscal impact of this project through 2027. REMI Tax-PI is a dynamic modeling software that incorporates different aspects of modeling approaches, which includes input-output, general equilibrium, econometrics, and economic geography. The model is calibrated specifically to Miami-Dade County for policy analysis and forecasting and includes economic and demographic and policy variables so that any project or policy that affects the local economy can be tested. REMI is used by government agencies (including most U.S. state governments), consulting firms, nonprofit institutions, universities, and public utilities.

Depending on the intensity of competition and substitution/cannibalization effects of the new businesses between South Dade and the rest of Miami-Dade County, the impact of each scenario in 2027 ranges from minimum - assuming the products and services of those new businesses in South Dade are completely substitutable to the rest of the County to maximum - assuming the products and services of those new businesses in South Dade are unique to the rest of the County therefore no cannibalization of the sales from the rest of the County.

Note: In the estimates from REMI, there is no spatial distribution within the county of the net economic and fiscal impacts. The South Dade region considered in this analysis is roughly evenly divided between incorporated and unincorporated areas. However, there is no way to precisely locate the incremental benefits and costs or expenses from the implementation of the strategic plan. First, the direct investments and job creation are conceptual, not specific. Indirect and induced investments and employment could occur anywhere in South Dade or even elsewhere in the county. The same is true with respect to the fiscal benefits and expenses accruing from implementation. South Dade municipalities and Miami-Dade County will realize additional tax and fee revenue as well as expenses from the demand for additional services. The numbers reported here are derived from financial ratios calculated

from latest 3 years of historical Miami-Dade County financial statements. Tax and expenditure rates for the municipalities will be different with some categories higher and others lower. However, as noted above, due to the conceptual nature of the strategic plan at this point, no attempt at “guessing” the distribution of benefits and costs has been made.

NAICS 2-DIGIT EMPLOYMENT CODES	NEW JOBS (2017-2019)		
	SCENARIO A BASELINE HISTORIC TREND	SCENARIO B MODERATE INTERVENTION	SCENARIO C SIGNIFICANT INTERVENTION
Agriculture, Forestry, Fishing & Hunting	3	3	4
Mining, Quarrying & Oil & Gas Extraction	2	2	2
Construction	690	690	690
Manufacturing	(68)	(68)	(68)
Wholesale Trade	274	274	274
Retail Trade	1,252	1,252	1,252
Transportation & Warehousing	398	547	802
Information	(70)	(70)	(70)
Finance & Insurance	519	769	1,026
Real Estate & Rental & Leasing	119	119	119
Professional, Scientific & Technical Services	1,595	2,391	3,188
Management of Companies & Enterprises	-	-	-
Administration & Support, Waste Management & Remediation	300	300	300
Educational Services	-	-	-
Health Care & Social Assistance	4,690	7,021	9,361
Arts, Entertainment & Recreation	-	-	-
Accommodation & Food Services	1,481	2,222	2,963
Other Services (excluding Public Administration)	-	-	-
Public Administration	482	482	482

Figure 42: Employment Growth Scenarios Under Various Economic Development Strategies

ECONOMIC & FISCAL IMPACT ANALYSIS RESULTS

The economic impact under these three scenarios can be measured by the changes from the baseline forecast in total employment, gross regional product, real disposable personal income, residential capital stock, and non-residential capital stock. Net fiscal impact to Miami-Dade County's government budget is measured under each scenario. The resulting values are expressed in millions of 2020 fixed dollars and summarized in Figure 43.

CATEGORY	SCENARIO A HISTORIC TREND		SCENARIO B MODERATE INTERVENTION		SCENARIO C SIGNIFICANT INTERVENTION	
	Min	Max	Min	Max	Min	Max
Total Employment (# of Jobs)	8,918	22,694	11,338	31,066	13,905	39,691
Gross Regional Product (GRP) (\$M)	\$856	\$2,084	\$1,086	\$2,841	\$1,330	\$3,620
Disposable Personal Income (\$M)	\$513	\$1,313	\$656	\$1,800	\$808	\$2,300
Residential Capital Stock (\$M)	\$368	\$940	\$471	\$1,291	\$580	\$1,649
Non-Residential Capital Stock (\$M)	\$259	\$401	\$315	\$562	\$373	\$728
Net Fiscal Impact (\$M)	\$28	\$50	\$35	\$73	\$42	\$96

Figure 43: Economic and Fiscal Impact Summary in 2027

EMPLOYMENT

For purposes of this analysis, employment includes both full-time and part-time jobs in Miami-Dade County. It includes the direct jobs created by the projects, indirect jobs created by other businesses as a result of the needs of these projects, induced jobs created by the expenditures of the direct and indirect employees, investment activity jobs created to produce the needed capital goods for the projects, and state and local employment to support population growth and increased economic activity.

REMI estimates the net employment impact of scenario A on Miami-Dade County in 2027 would range from 8,918 to 22,694 jobs; scenario B would range from 11,338 to 31,066 jobs; and scenario C would range from 13,905 to 39,691 jobs.

GROSS REGIONAL PRODUCT (GRP)

Gross Regional Product (GRP) is analogous to the nation's Gross Domestic Product (GDP). It is the total value of all goods and services produced in a region. It can be used as a barometer to gauge a region's economic well-being. REMI estimates the net GRP impact of scenario A on Miami-Dade County in 2027 would range from \$856M to \$2,084M; scenario B would range from \$1,086M to \$2,841M; and scenario C would range from \$1,330M to \$3,620M.

DISPOSABLE PERSONAL INCOME

Disposable Personal Income (DPI) represents the after-tax income that can be spent or saved by income earners. According to REMI, the impact of total DPI in the county in 2027 for scenario A would range from \$513M to \$1,313M; scenario B would range from \$656M to \$1,800M; and scenario C would range from \$808M to \$2,300M.

CAPITAL STOCK

Residential capital stock is the value of all residential capital (housing structures) in the region accumulated over time, net of depreciation. According to REMI, the impact on residential capital stock in the county in 2027 for scenario A would range from \$368M to \$940M; scenario B would range from \$471M to \$1,291M; and scenario C would range from \$580M to \$1,649M.

Non-residential capital stock is the value of all non-residential capital (non-housing structures) in the region accumulated over time, net of depreciation. REMI estimates the non-residential capital stock impact of scenario A on Miami-Dade County in 2027 would range from \$259M to \$401M; scenario B would range from \$315M to \$562M; and scenario C would range from \$373M to \$728M.

FISCAL IMPACT

Fiscal impact is the net impact on Miami-Dade County government's fiscal balance sheet, i.e., total revenues minus total expenditures. REMI estimates the net fiscal impact of scenario A on Miami-Dade County in 2027 would range from \$28M to \$50M; scenario B would range from \$35M to \$73M; and scenario C would range from \$42M to \$96M.

SECTION 8

INITIAL MARKETING APPROACH

As part of the development of the economic development strategy, an initial marketing strategy was developed to provide a foundation for a fully formed marketing program. The preliminary strategy is built on information that has been collected in past economic development strategy efforts and provides a basis for the enhanced LEDO to commence marketing efforts. The goal of this strategy is to:

Help attract, retain and expand businesses and identify the target audience; improve the community's image and position within South Dade, on a countywide basis, as well as outside of the County; and, to identify and promote policies and programs that can improve the business environment in South Dade.

BACKGROUND

As part of the effort to compile this strategic plan, the project team met with the Beacon Council to discuss how they can assist the South Dade EDC to market South Dade to attract jobs and businesses to the area. Also discussed was **how South Dade could adapt the South Dade More to Explore marketing tag line and imagery, that has been very successful for tourism, and for economic development marketing.**

The **Beacon Council staff described the current marketing strategy for Miami-Dade County which uses the Advantage Miami name. Advantage Miami focuses on the "Miami" brand in an effort to promote the County on the basis of the fact that whether you are in Homestead or Aventura, people from outside of the County know the area as "Miami".**

The possibility of adapting the current South Dade More to Explore for Economic Development was also explored. While there was concurrence among the meeting attendees to keep South Dade More to Explore...for Economic Development for the time being, a fully developed enhanced economic marketing tagline and program will be required to more fully market the area. Below (Figure 44) is one demonstration of imagery that could be used within marketing material for South Dade economic development.



Figure 44: Sample Images for South Dade Economic Development Marketing Material

While a need exists for **South Dade to retain its identity** it was agreed that The Beacon Council would promote South Dade under the umbrella of Advantage Miami as a means of bringing attention to the area from entities outside of the County.

RECOMMENDATION TO DEVELOP A DETAILED MARKETING STRATEGY

It is strongly recommended that an initial step in the implementation of this plan should be to develop a marketing strategy specific to the recommendations contain in this plan. The strategy would benefit from working with organizational partners and should include:

- » Community Positioning and Image Who are the target audiences?
- » How to target the industries contained in this report? Development of marketing tools.
- » Mechanisms for the delivery of the marketing strategy.
- » Specific recommendations associated with marketing of each industry are included within the individual industry matrices in Section 6.

SECTION 9

IMPLICATIONS OF SEA LEVEL RISE/CLIMATE CHANGE ON ECONOMIC DEVELOPMENT

While climate change will impact all facets of living and doing business in South Dade including increased cost and risk of doing business; higher than normal temperatures and sea level rise will particularly impact two major industries in South Dade that are especially vulnerable to the impact of climate change: Defense and Agriculture. Temperature is expected to rise by 1.8 to 4.0 degrees Celsius by the end of the century major impacts on Miami-Dade County, water levels and salt water intrusion, which in turn will threaten low lying Homestead Air Reserve Base and the agricultural areas of South Dade. Homestead Air Reserve Base's location adjacent to Biscayne Bay makes it vulnerable to frequent flooding as well as hurricane impact.

Beyond water intrusion under existing trends, extreme heat days at Florida's Air Force and Navy bases would rise from 29 days per year to 102 days a year by mid-century, with the Union of Concerned Scientists forecasting the Homestead Air Reserve Base to be near the 100-day mark. This has broad implications not only for base operations but is also likely to impact humanitarian and other missions for the Defense personnel stationed at Homestead which are responsible for responding to crises throughout the Caribbean Basin. While, the Department of Defense (DOD) is developing

policies and plans to manage and respond to the effects of climate change on DOD missions, assets, and operational environment, environmental impacts can significantly hinder the mission of Defense installations, as was experienced in South Dade following Hurricane Andrew and more recently at Tyndall Air Force base from Hurricane Michael in 2018.

While the future of HARB's operations are clearly at risk from sea level rise, according to Renee Cho, author with the Earth Institute at Columbia University, the economic sector most vulnerable to climate risk is agriculture. Extreme rainfall and flooding are impacting agricultural production throughout the United States. In addition, increased heat and drought are likely to reduce crop yields. A reduction in yields causes a disruption to the marketplace domestically and abroad.

In South Dade, the University of Florida Tropical Research and Education Center is partnering with local government and the agricultural community to research and development innovations in agricultural practices and products that will mitigate the impact of climate change. A particular challenge to agriculture is the demand for potable water from a growing population.

Given the importance of these industries to South Dade's future the enhanced LEDO should be a central participant in local and regional resiliency efforts such as Resilient 305, as well as efforts related to Homestead Air Reserve Base through the Department of Defense and U.S. Army Corps of Engineers and agricultural efforts coordinated through the TREC Center. Through this participation, the LEDO can be aware of the threats to the region's economy and timing of those threats. In turn, the LEDO can be an important advocate for resiliency efforts and investments at the local, county, state and federal level.

Appendix A

IEDC ROADMAP

Appendix B

TIER 1, 2 & 3 RANKED SITES

Appendix C

LITERATURE REVIEW SUMMARY