



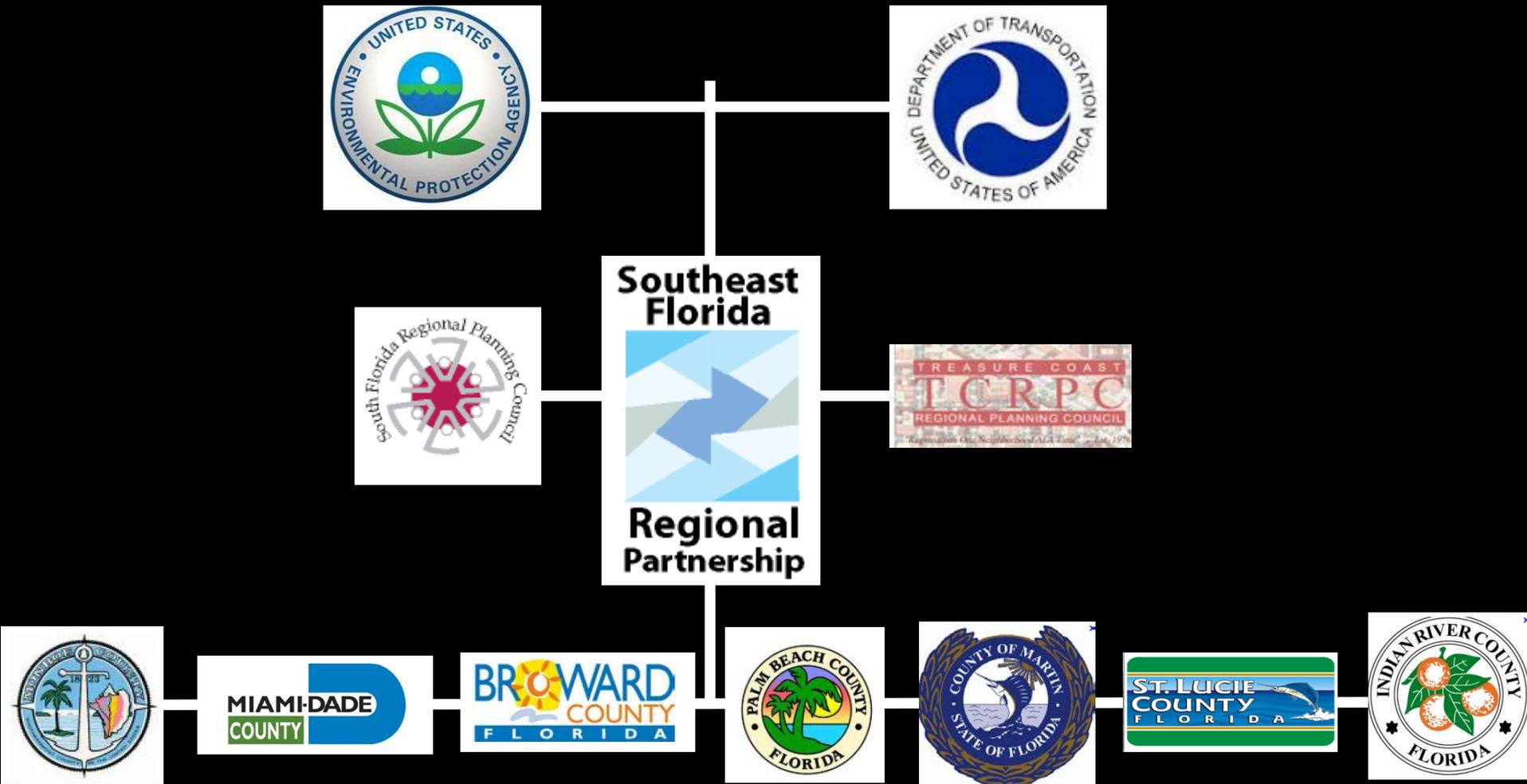
The plan for the 7 counties of SE Florida was led by the South Florida Regional Council, 2013 to 2015

# The Region



The region:  
7 counties · 121 municipalities · 250+ linear miles · 6.2+ million people

# Seven50: A HUD Sustainable Communities Initiative



The mission of the Office of Sustainable Housing and Communities is to create strong, **sustainable communities** by connecting housing to jobs, fostering local innovation, and helping to build a clean energy economy.

# A PROCESS THAT REACHED MORE THAN

# 1 MILLION

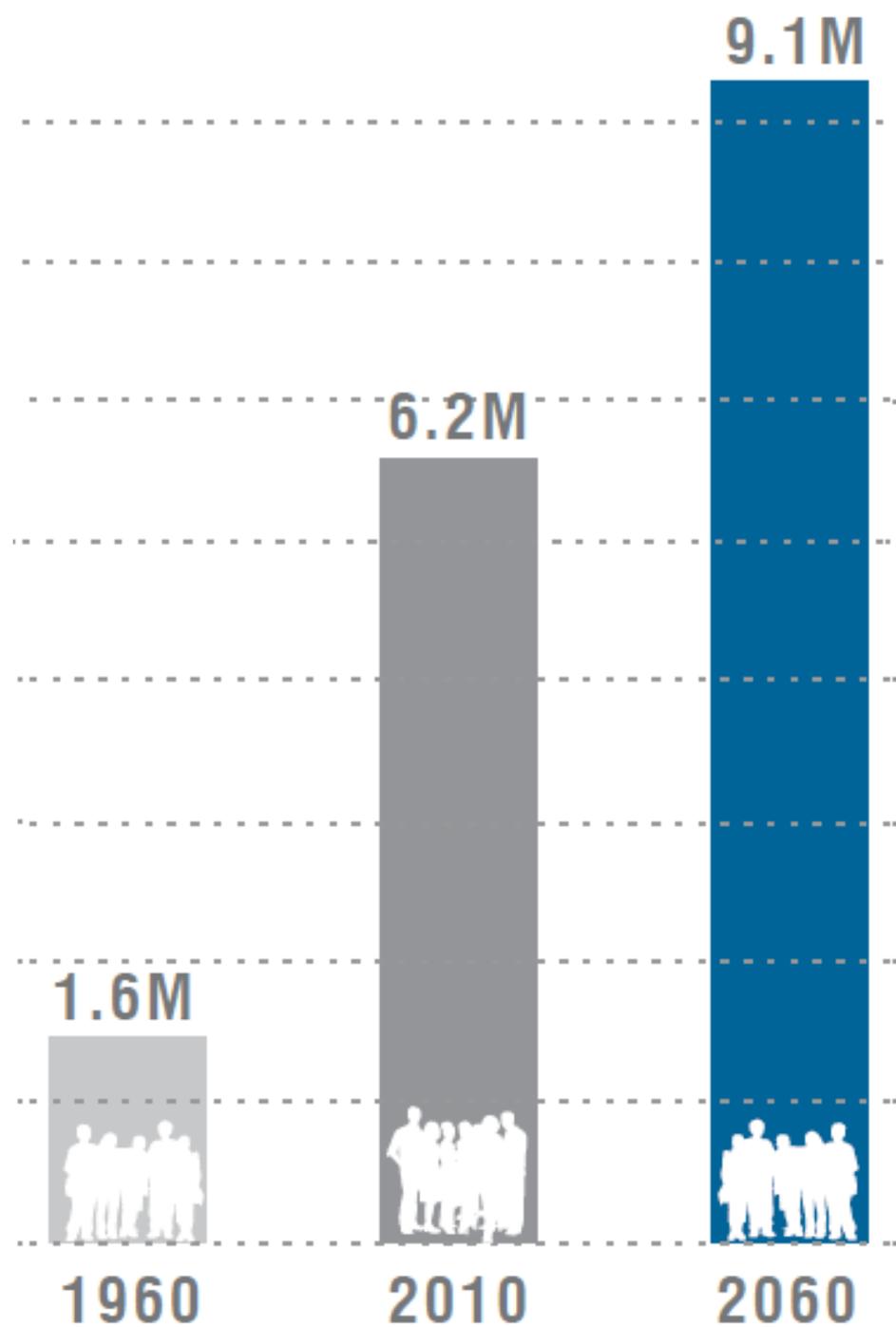


TRACKABLE MEDIA IMPRESSIONS



**3** **MILLION**

**MORE  
PEOPLE BY  
2060**



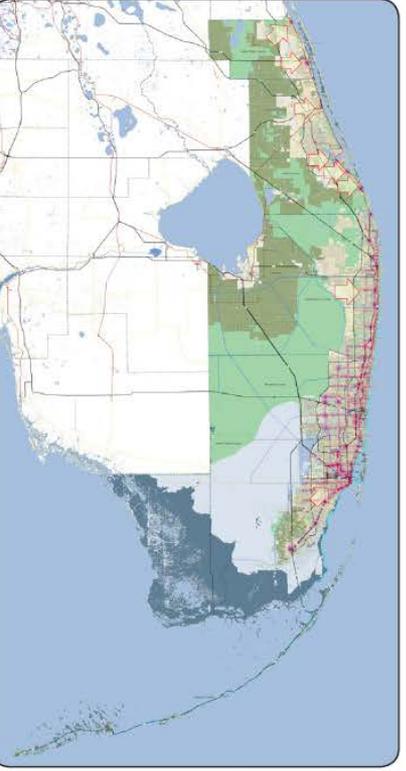
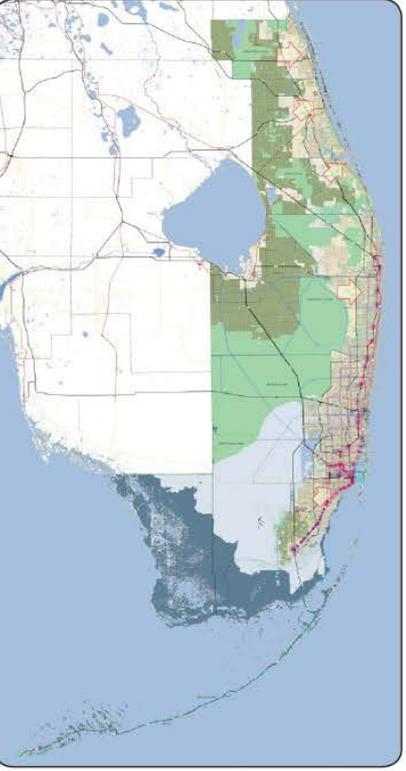
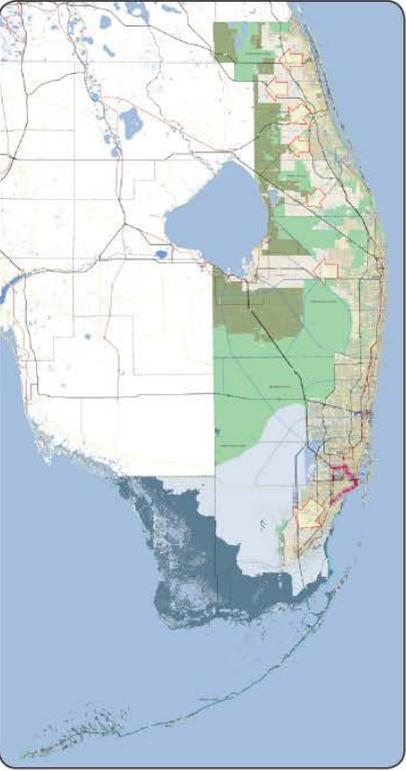
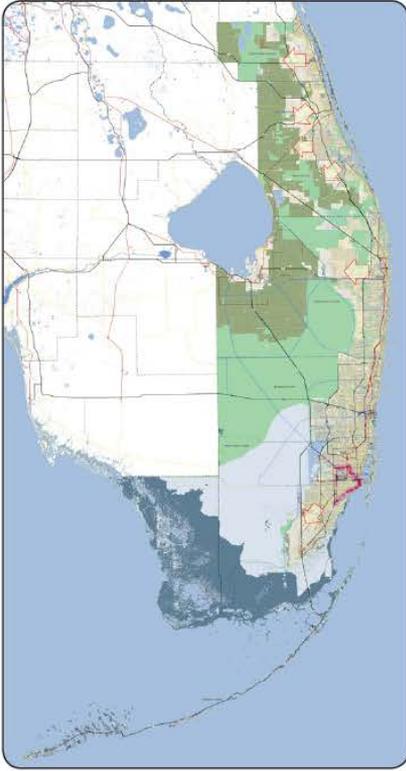
# “Choose Your Future”

TREND: STAY THE COURSE

SUBURBAN EXPANSION

STRATEGIC UPGRADES

REGION IN MOTION



**4%**

**19%**

**4%**

**73%**

Over 73% of participants chose a Smart Growth approach

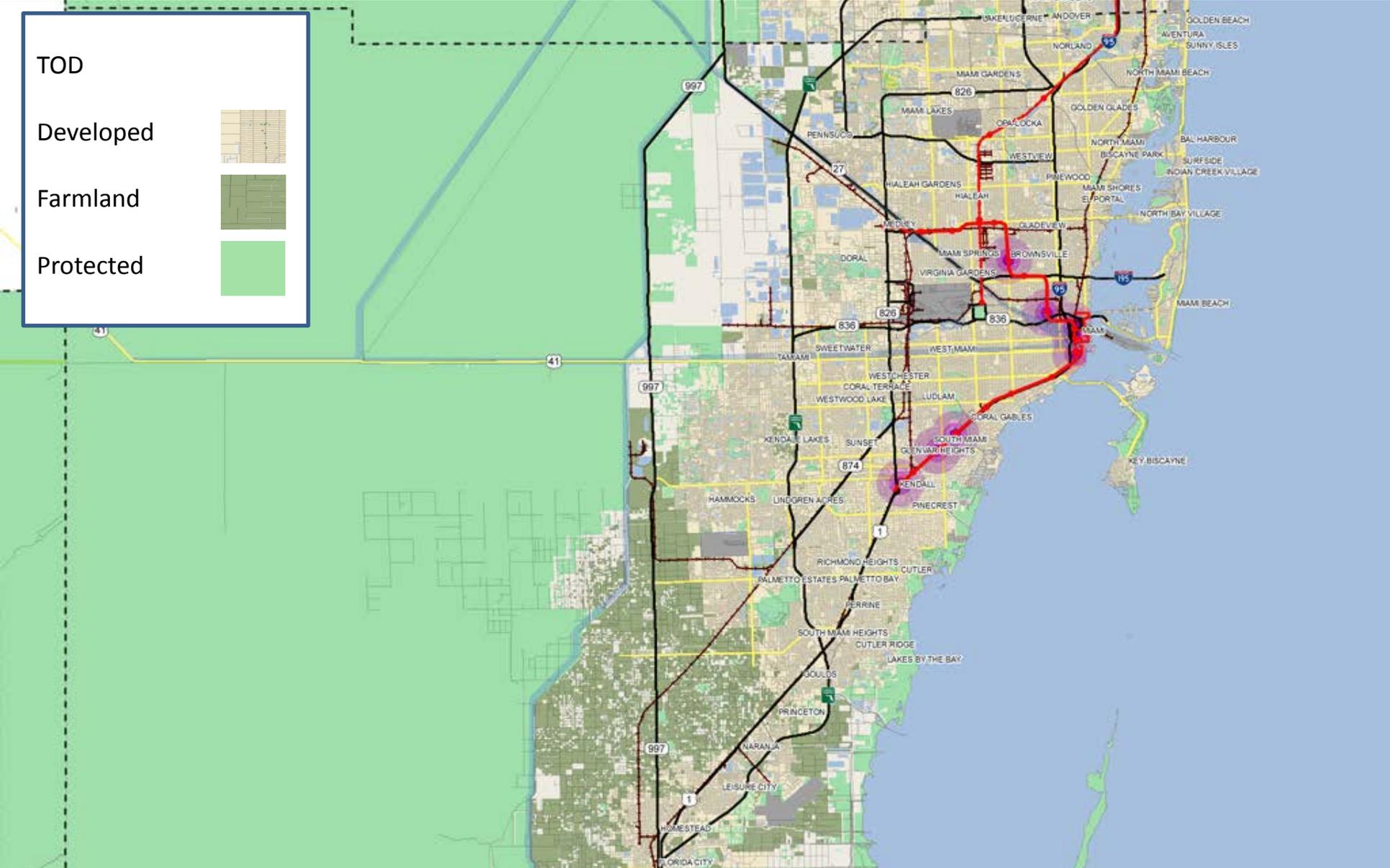
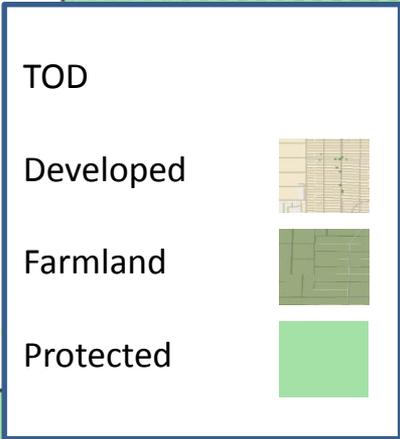
# Miami-Dade County

TOD

Developed

Farmland

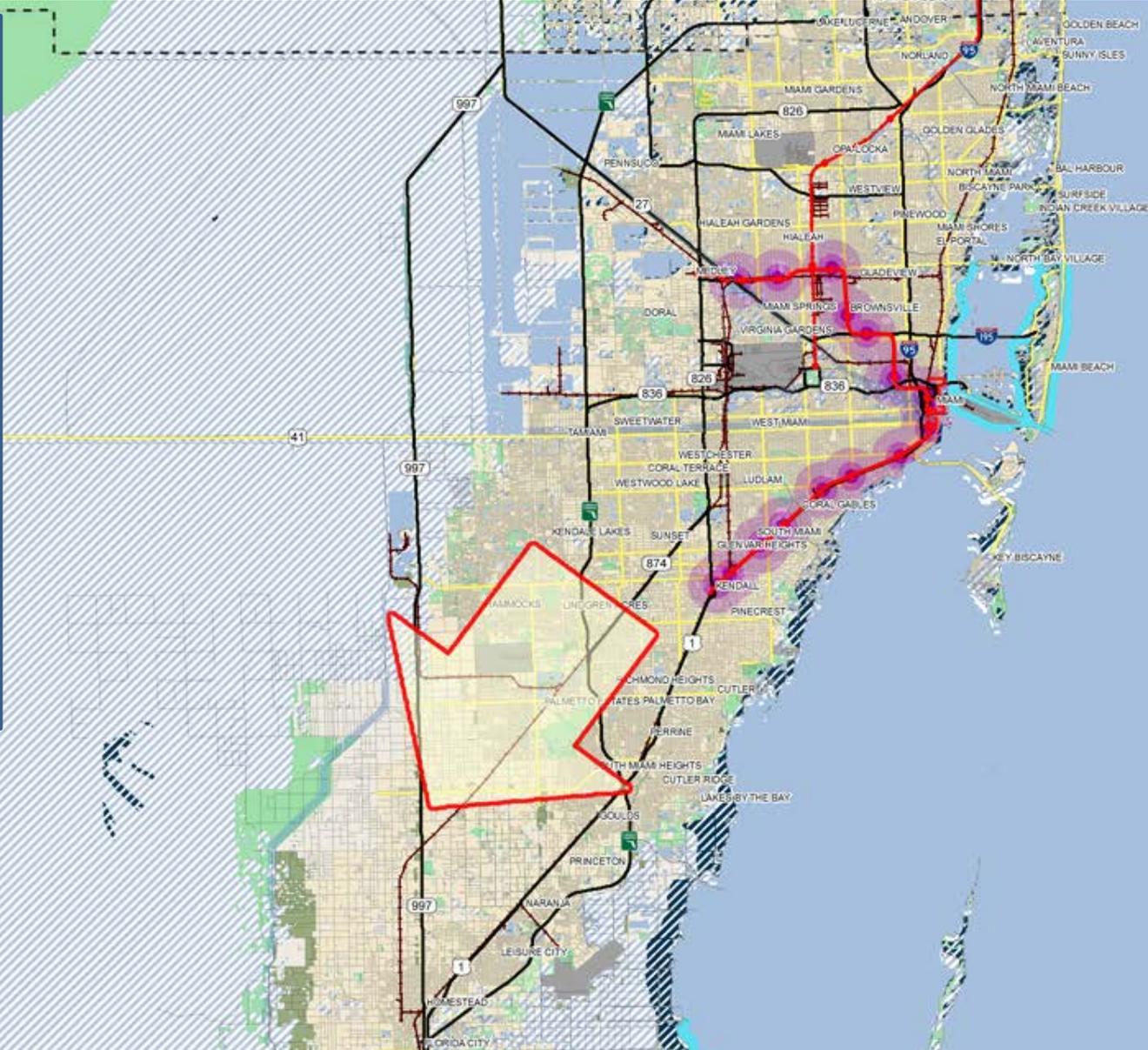
Protected



# Miami-Dade County

**TOD**

- Developed 
- Farmland 
- Protected 
- 100 Year Flood 
- Inundation 
- Resilience Investments 
- Population Pressure 



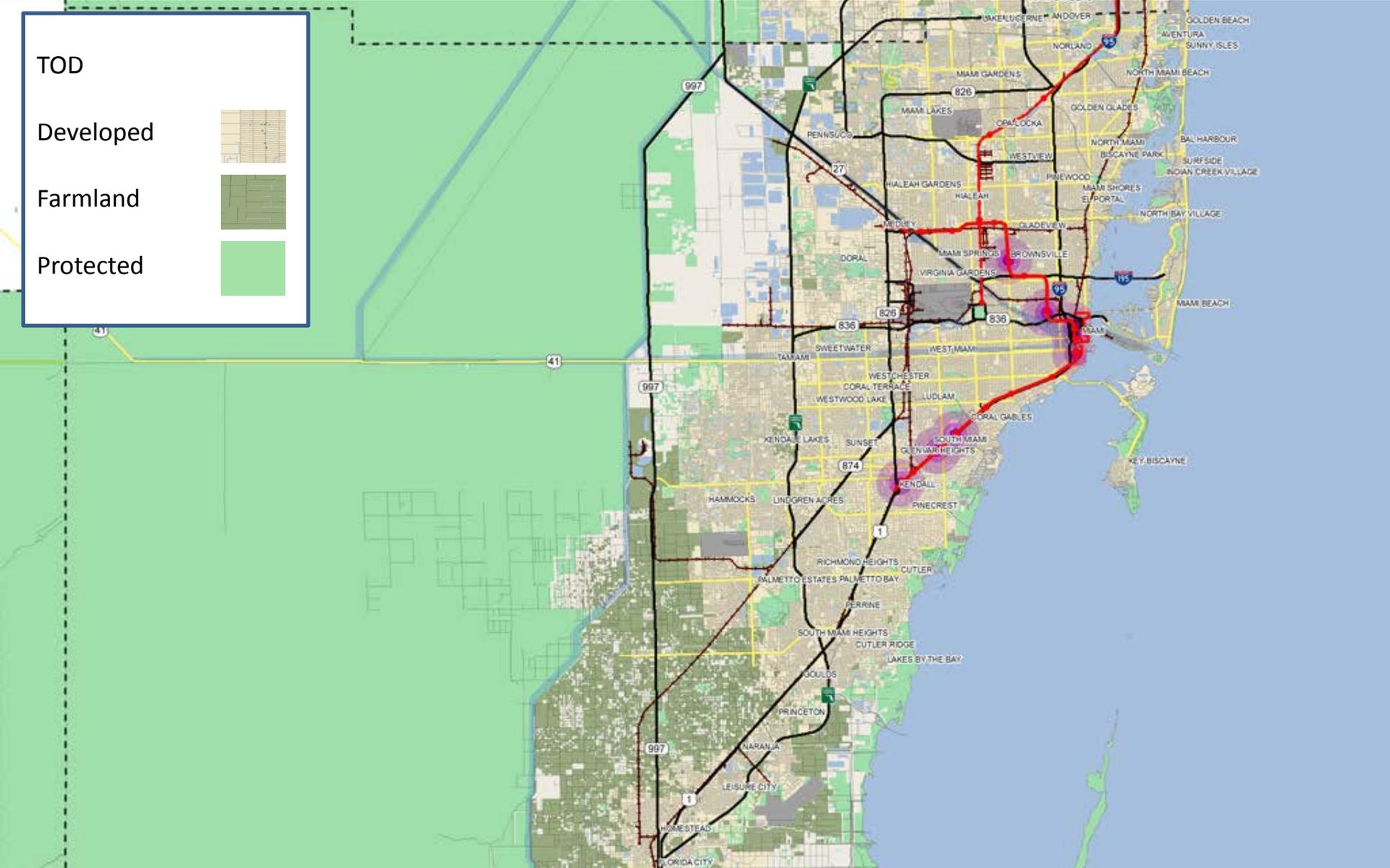
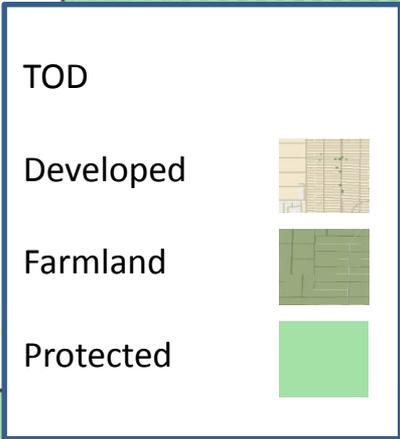
# Miami-Dade County

TOD

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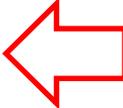
Farmland

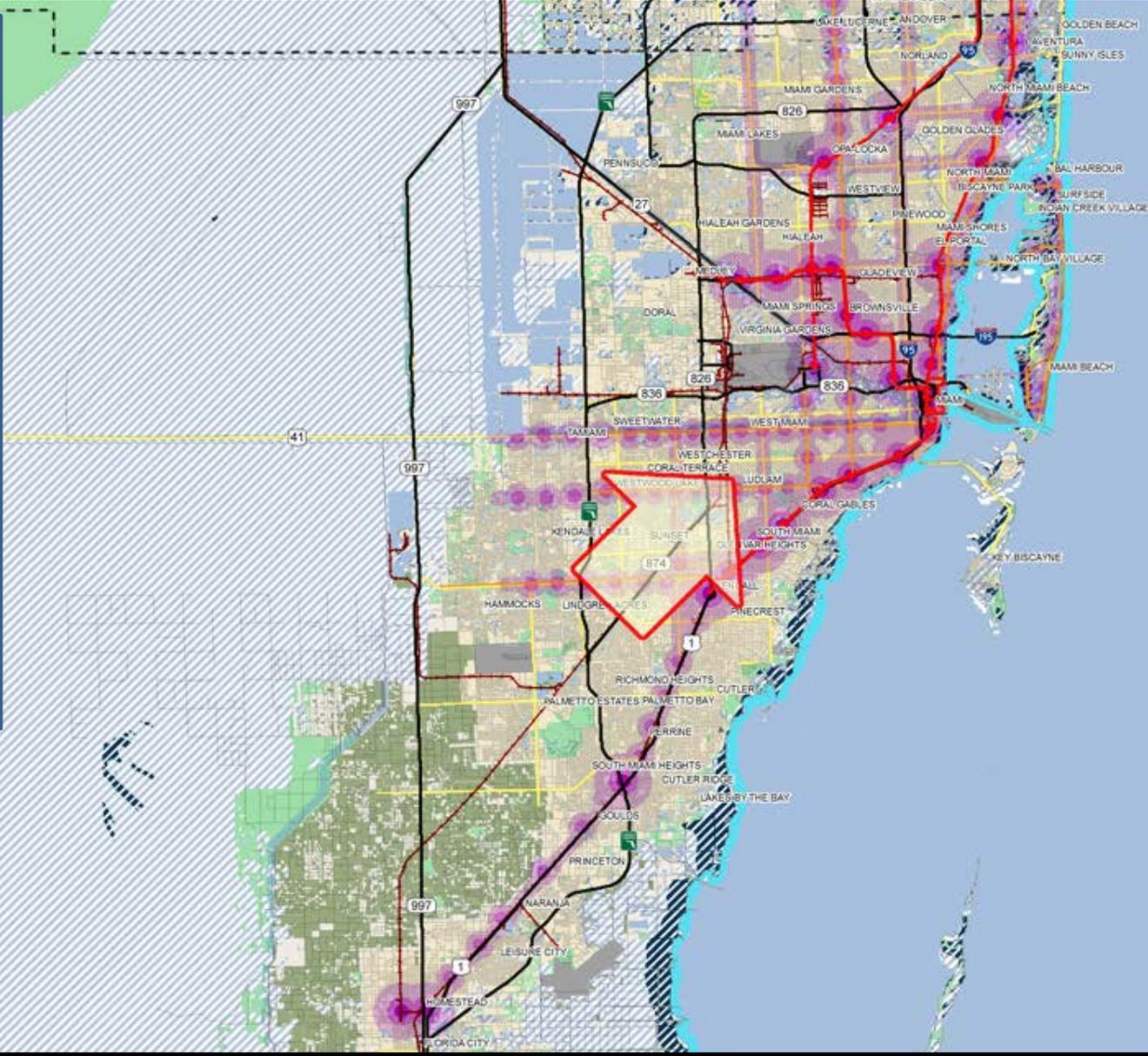
Protected

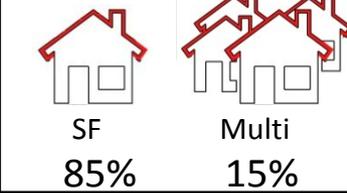
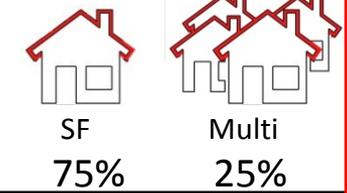
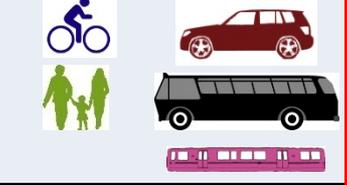
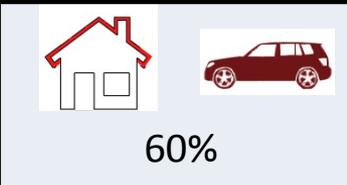
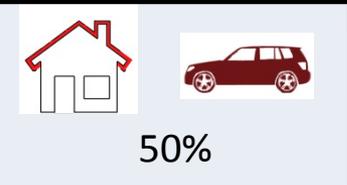
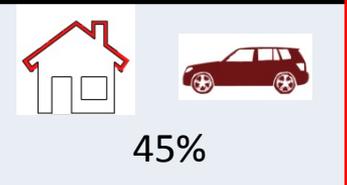
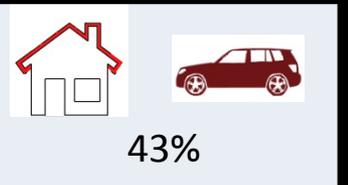


# Miami-Dade County

**TOD**

- Developed 
- Farmland 
- Protected 
- 100 Year Flood 
- Inundation 
- Resilience Investments 
- Population Pressure 



	Trend	1: Suburban Expansion	2: Strategic Upgrades	3: Region in Motion
Farmland Consumed	 250+ Sq. Miles	 480+ Sq. Miles	 150 Sq. Miles	 60 Sq. Miles
Infrastructure Cost (Transportation, Water, Sewer, Utilities)	 \$31.3 Billion	 \$38.1 Billion	 \$26.4 Billion	 \$24 Billion
Single Family Homes vs. Condos, Apartments & Townhomes	 SF 85% Multi 15%	 SF 90% Multi 10%	 SF 75% Multi 25%	 SF 65% Multi 35%
Transportation Choices				
Walkable Communities (Walk to Work, Stores, School, Transit, Parks)				
Average Housing + Transportation % Income Per Household	 60%	 50%	 45%	 43%
Climate Resilience Investment	\$	\$	\$ \$	\$ \$ \$



# Urban Expansion Area Task Force

## January 5, 2018

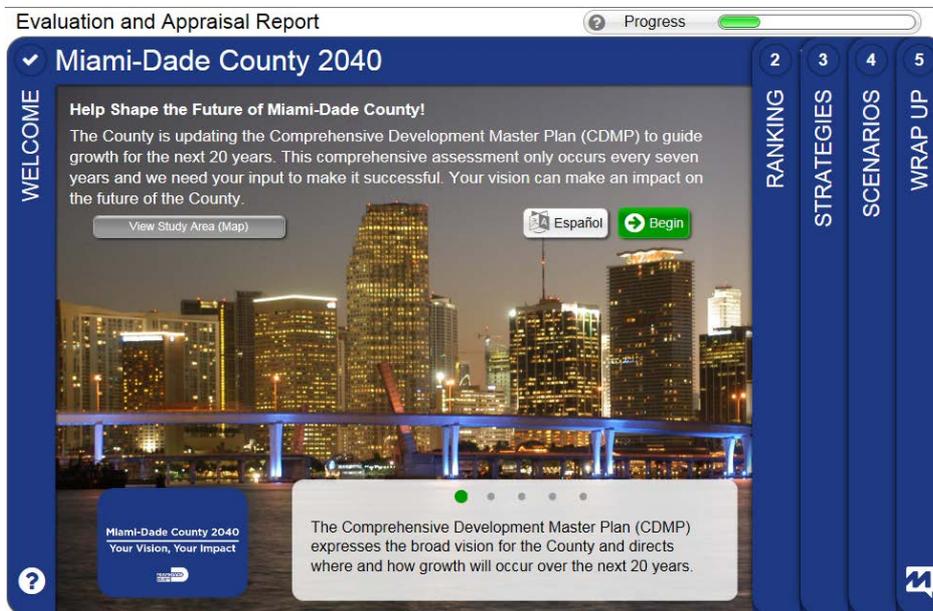
### 2018 EAR Survey Results

Jerry Bell, AICP  
Assistant Director, Planning

Kimberly Brown, AICP  
Supervisor, Long-Range Planning



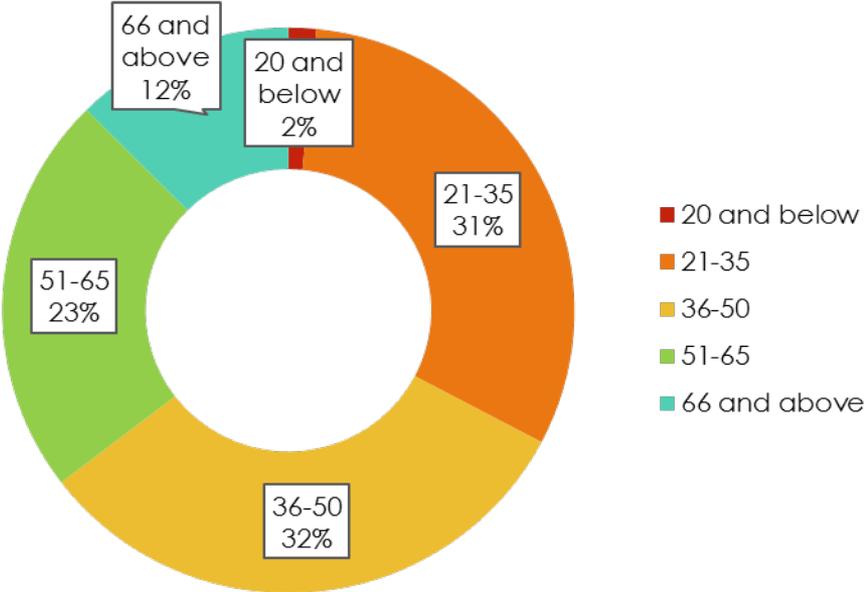
# 2018 EAR Survey



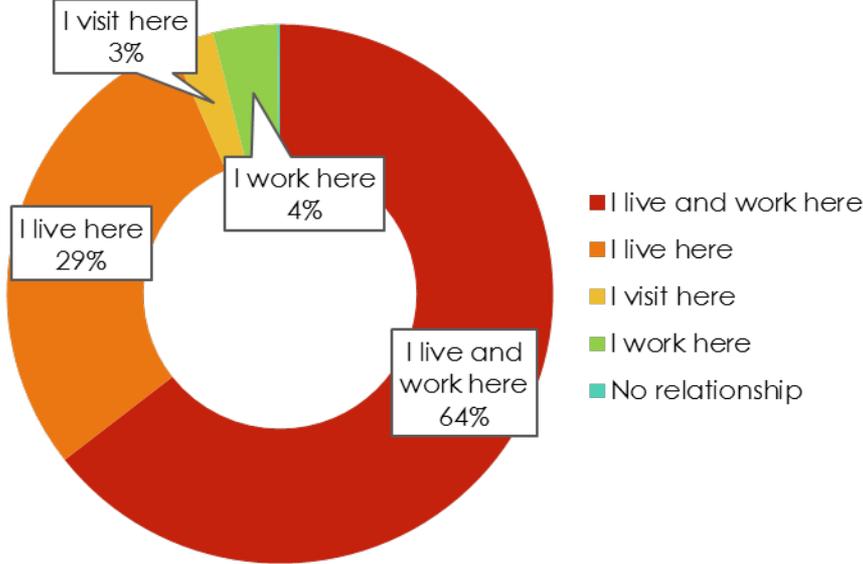
- EAR Survey - interactive web-based platform for public input
- English and Spanish versions
- Closed mid-November
- Over 1100 respondents

# Who Responded to the EAR Survey?

### Respondent Age Structure



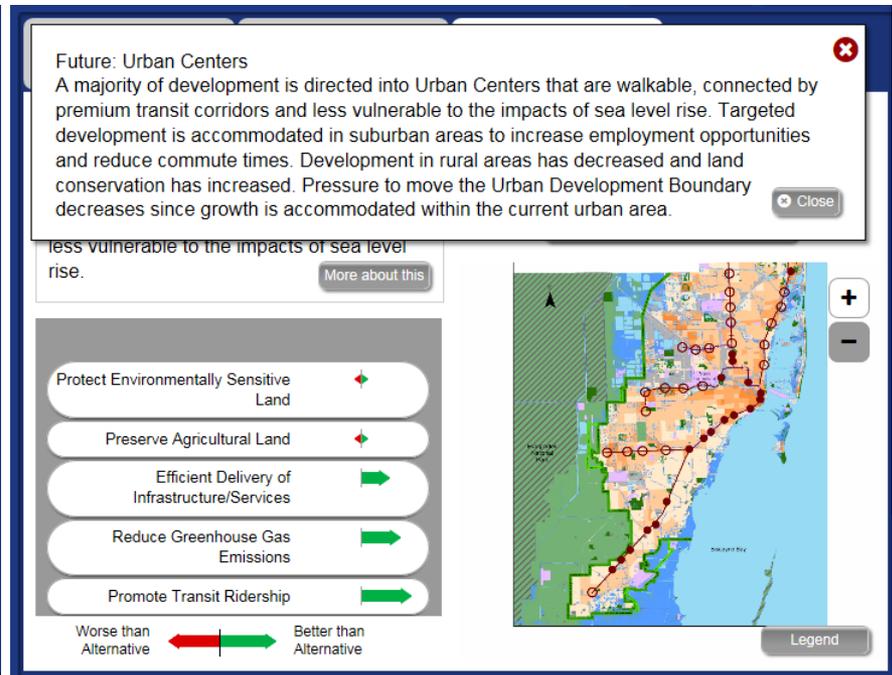
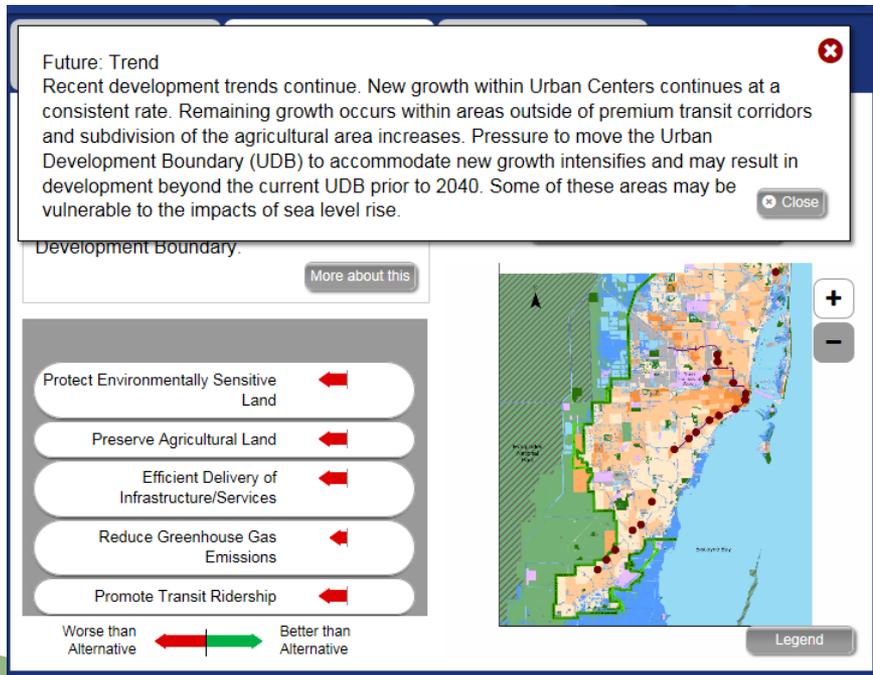
### Relationship with Miami-Dade County



# 2018 EAR Survey

## Growth Scenarios

- How should we grow to 2040?
- Today (baseline), Future: Trend, Future: Urban Centers
- Shows potential impacts of various growth scenarios

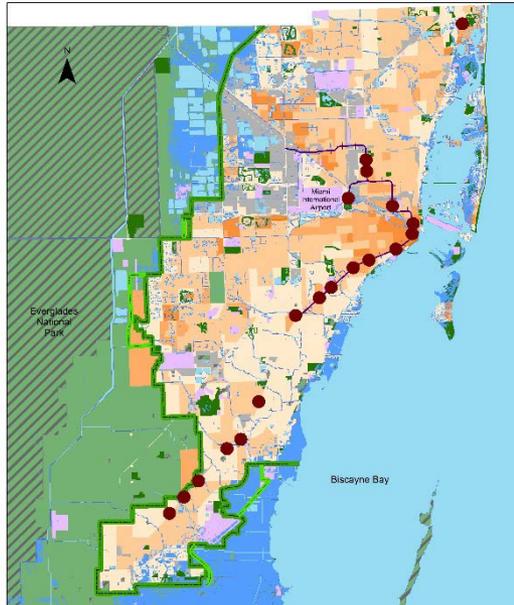






# 2018 EAR Survey

Future: Trend Scenario

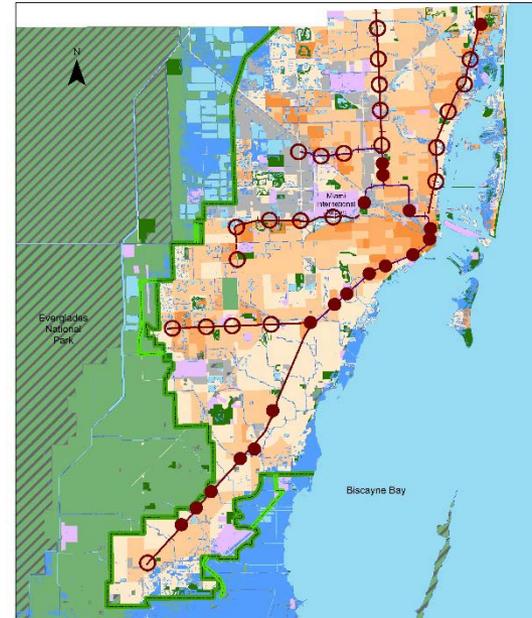


Impacts:

- Loss of Agricultural and Environmentally Sensitive Land

VS

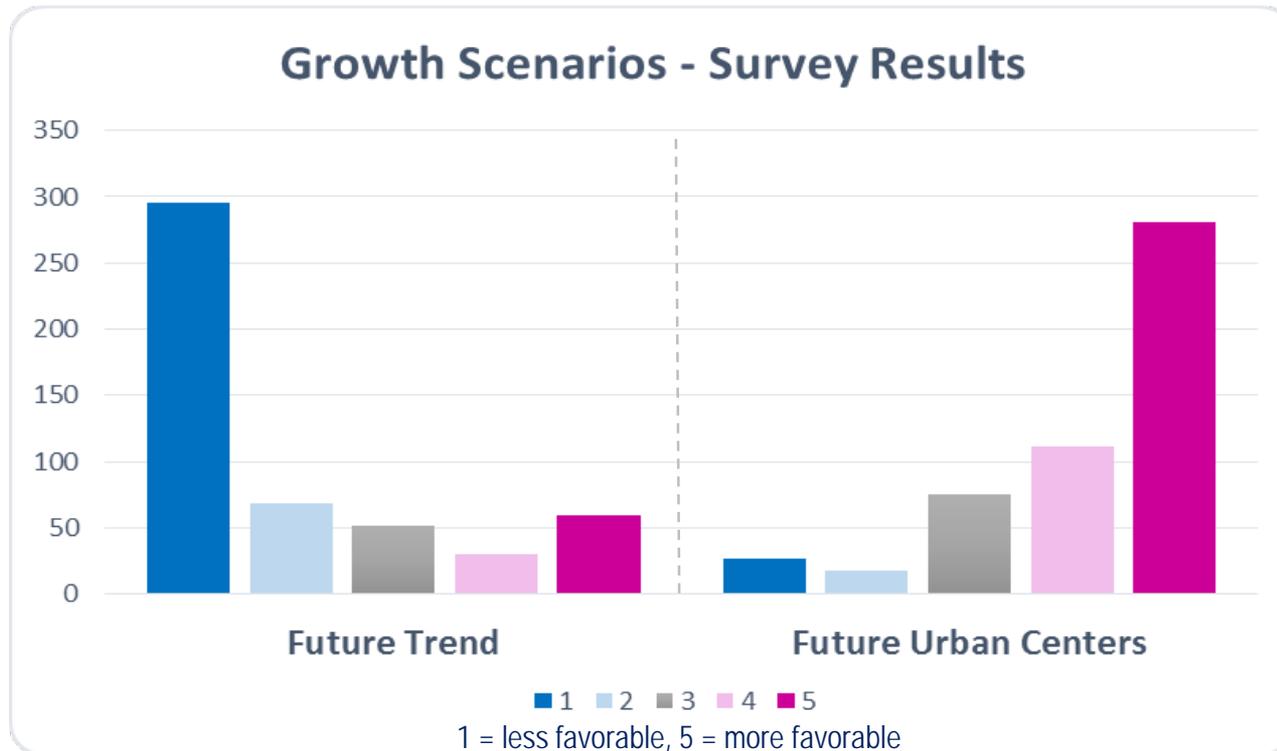
Future: Urban Center Scenario



Impacts:

- Efficient Delivery of Services
- Promotes Transit Ridership
- Reduces GHG Emissions

# Survey Results – Growth Scenarios



Future Trend: Growth trends continue which may result in development beyond the current Urban Development Boundary.

Future Urban Centers: Growth occurs in Urban Centers that are walkable, connected by premium transit and less vulnerable to the impacts of sea level rise.



# Urban Expansion Area Task Force

## January 5, 2018

### CDMP Policies Related to Housing Affordability

Jerry Bell, AICP  
Assistant Director, Planning

Kimberly Brown, AICP  
Supervisor, Long-Range Planning



# *Workforce Housing CDMP Policies*

- Voluntary Workforce Housing Density Bonus Program – up to 25% density bonus for development of WHU (units priced for households between 60 and 140% of AMI).
- Objective HO-6. Increase affordable housing opportunities within reasonable proximity to employment, mass transit and necessary public services in existing urbanized areas.
  - Code requires 12.5% workforce housing units in Urban Centers



# Miami-Dade County Department of Regulatory and Economic Resources, Planning Division

Jerry Bell, AICP  
Assistant Director, Planning

Kimberly Brown, AICP  
Supervisor, Long-Range Planning



[www.miamidade.gov/planning/ear-2018.asp](http://www.miamidade.gov/planning/ear-2018.asp)

# Affordable Housing in Miami-Dade County

Urban Expansion Area Task Force  
January 5, 2018

Department of Regulatory and Economic Resources  
Planning Research and Economic Analysis Section

# Is it becoming a crisis?

- Increasingly, working-class households cannot afford a mortgage or rent.
- Growth in rents and homeownership costs continues to exceed the rate of growth of incomes by a large margin.
- Without transportation improvements, growing transportation costs only make the situation worse.

# What is a Cost-Burdened household?

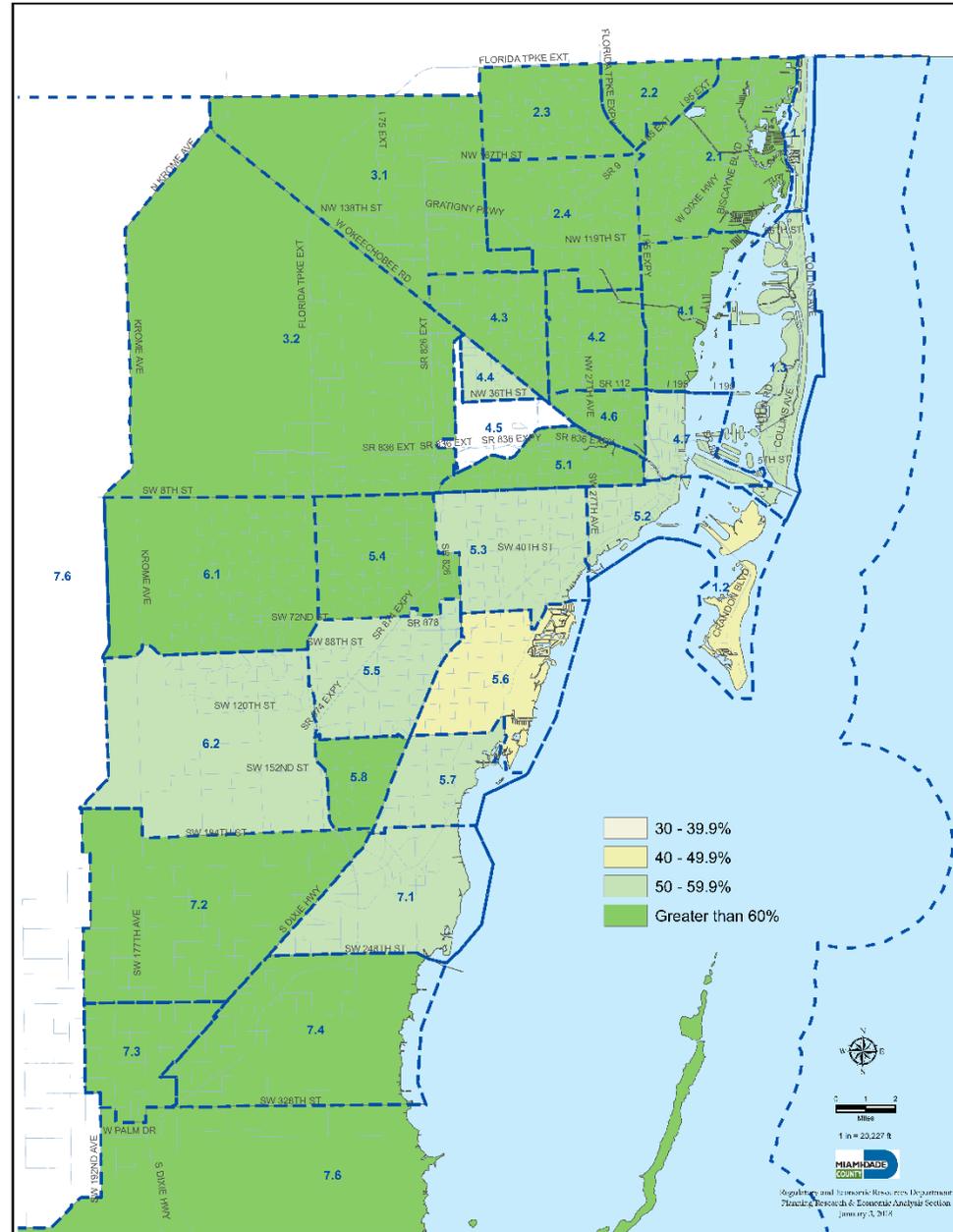
The conventional public policy indicator of housing affordability in the United States is **the percent of income spent on housing**. Housing **expenditures that exceed 30 percent** of household income have historically been viewed as an **indicator of a housing affordability problem**.

*U.S. Census Bureau*

## Affordable Housing in Miami-Dade County

# The Numbers

## Cost Burden of Renters by MSA

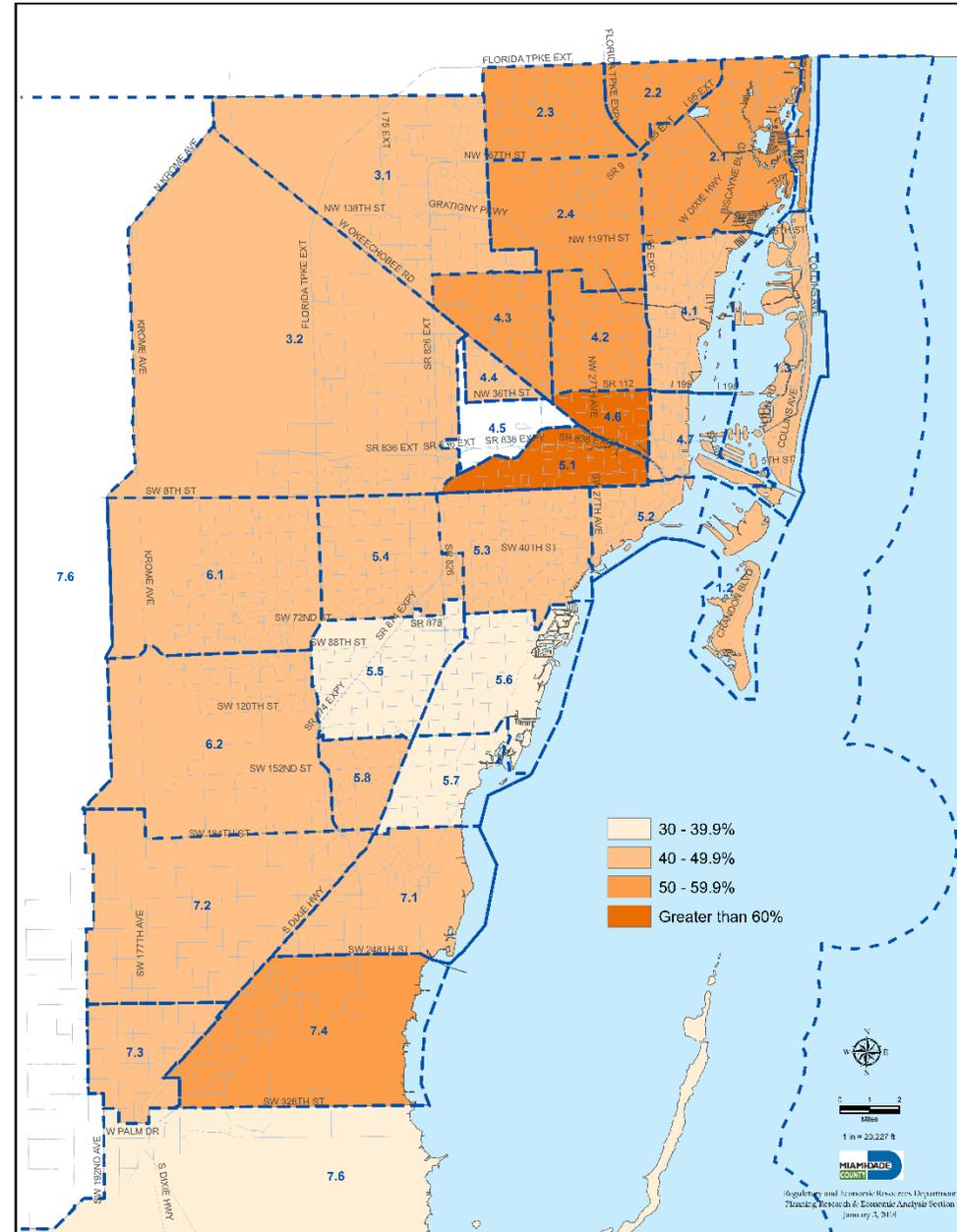


- The measure counts the number of households where the median rent (the typical rent) as a share of the median (or typical) household income in an MSA is greater than 30%.
- There was not a single minor statistical area (MSA) where the typical renter household wasn't cost burdened.
- The cost-burden rate of households ranged from 41% of households in MSA 1.2 up to 69% in MSA 5.1.
- 18 MSAs had rates that were 60% or higher.

## Affordable Housing in Miami-Dade County

# The Numbers

## Cost Burden of Home owners by MSA

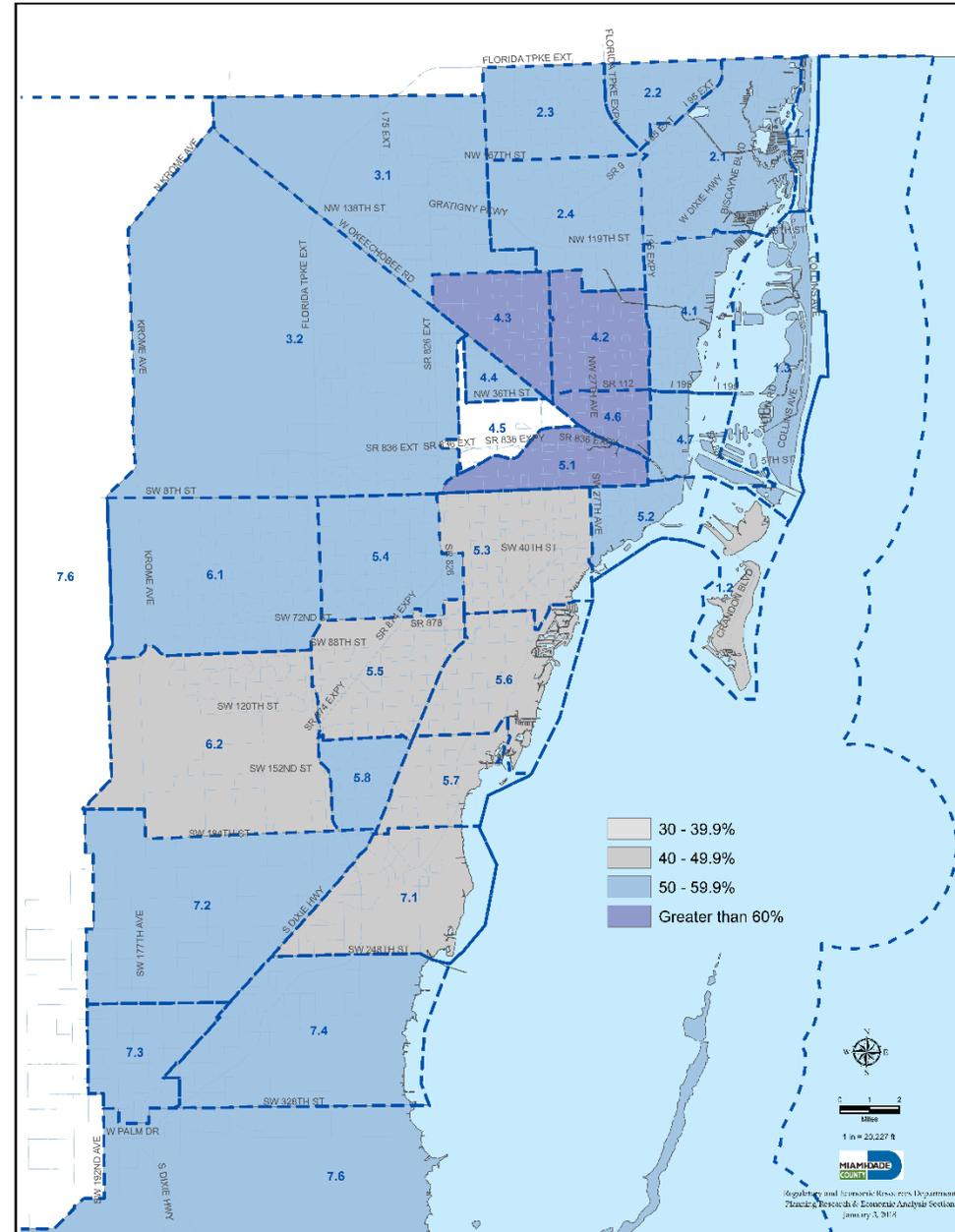


- The measure counts the households where the median (or typical) share of homeownership costs as a share of the median (or typical) household income in an MSA is greater than 30%.
- The rate ranged from 33% of households that were cost burdened in MSA 7.5 up to 64% in MSA 5.1.
- 10 MSAs had rates that were over 50%.

## Affordable Housing in Miami-Dade County

# The Numbers

## Cost Burden of all households by MSA

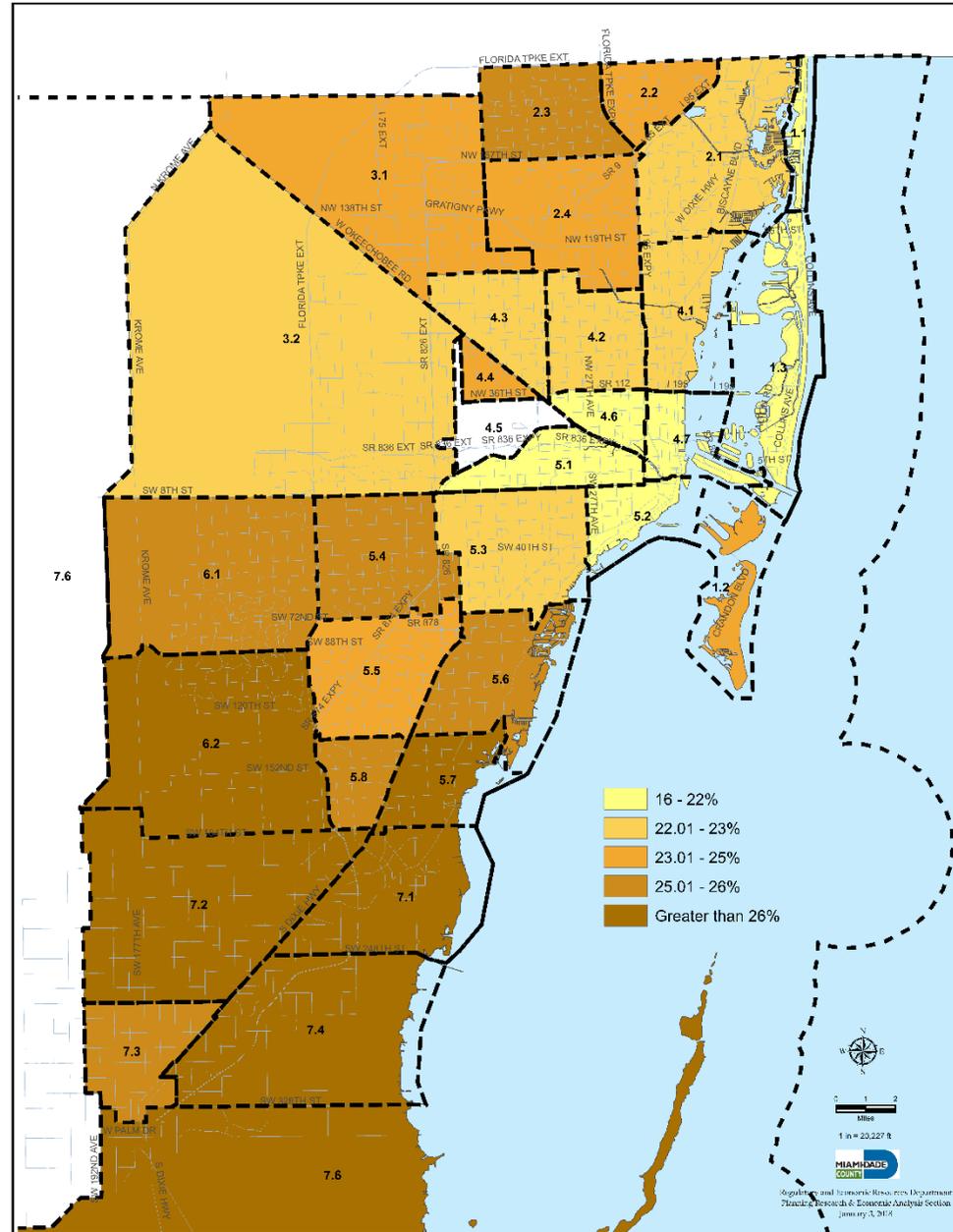


- The measure combines the number of both renter and owner households.
- The rate ranged from 41% of households in MSA 1.2 up to 68% in MSA 5.1 that were cost burdened.
- 23 MSAs had rates that were over 50%.

## Affordable Housing in Miami-Dade County

# The Numbers

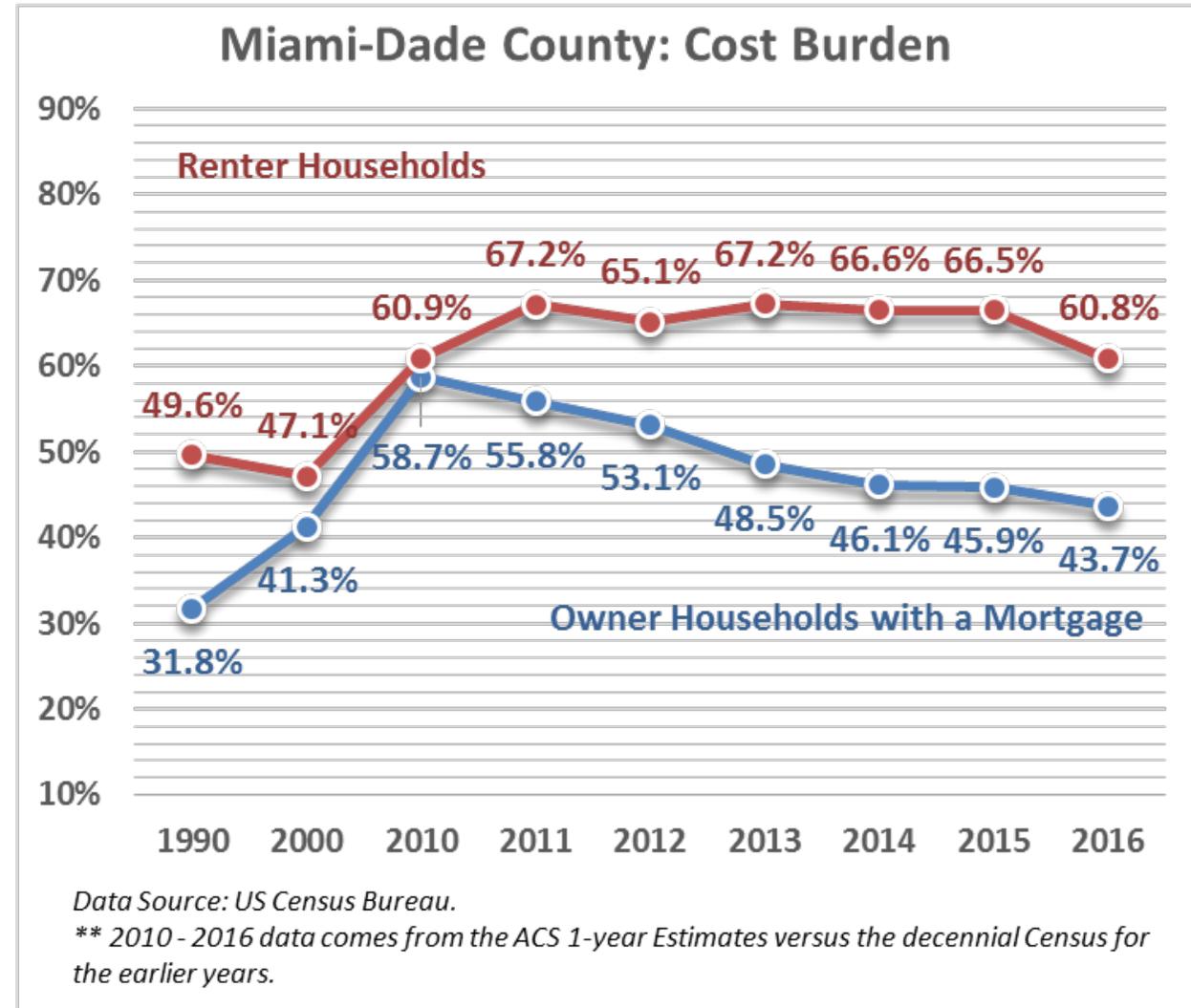
## Transportation Cost Burden of households by MSA



- The measure compares estimated transportation costs by MSA from the Center for Neighborhood Technology (CNT) with the countywide Area Median Income (AMI) published by U.S. HUD.
- At 15%, a household is considered cost burdened.
- Every MSA had a transportation cost burden rate in excess of 15%, ranging from a low of 16% in MSA 4.7 to a high of 28% in MSA 5.7.

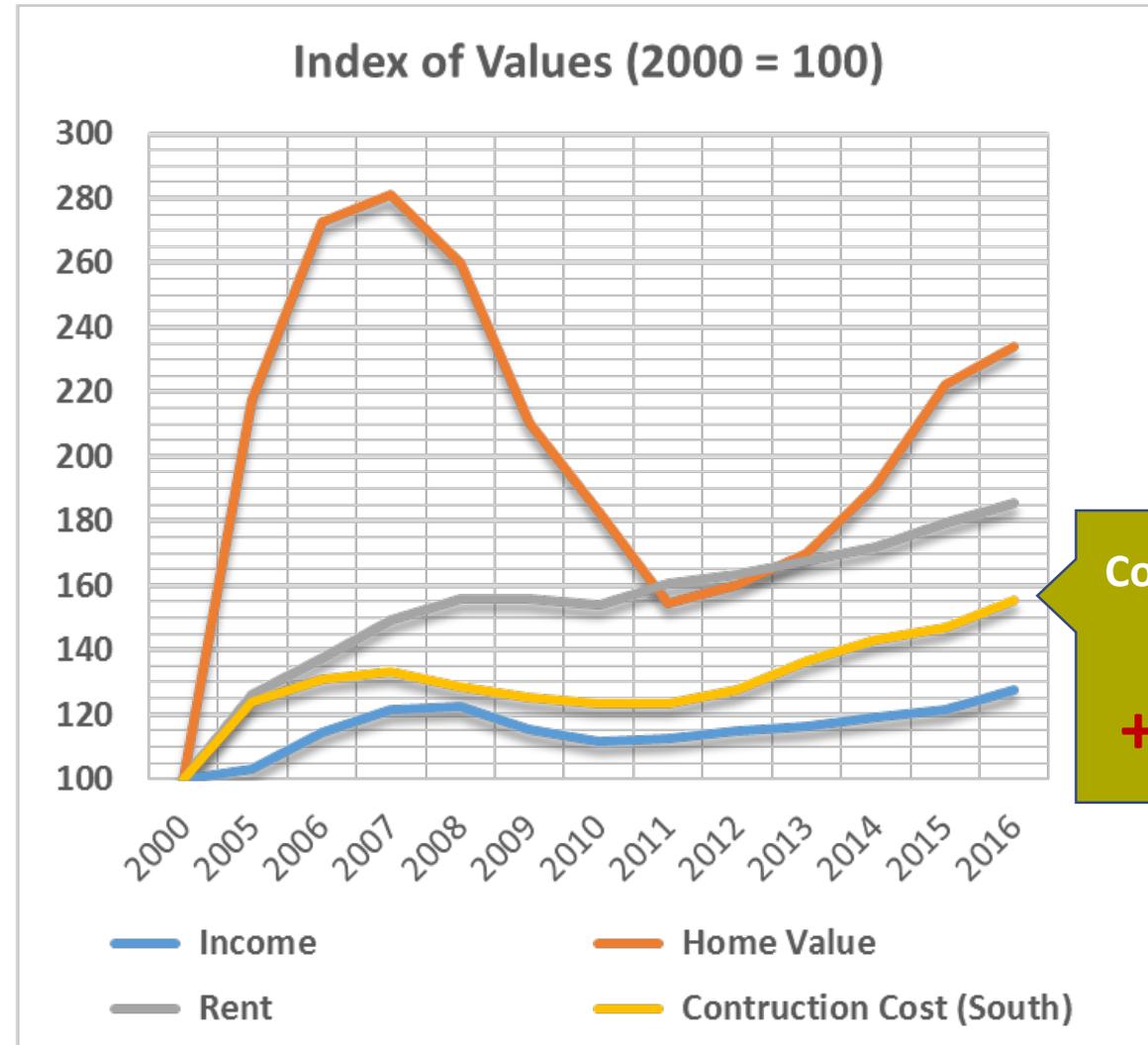
## County Trends

- The impact of the housing bubble is immediately apparent in this time series chart of cost burden.
- Long before the bubble, however, nearly half of renter households and one-third of owner households were cost burdened.
- While the numbers have improved modestly recently, more than three out of five renter households and two out of five owner households remain cost burdened.



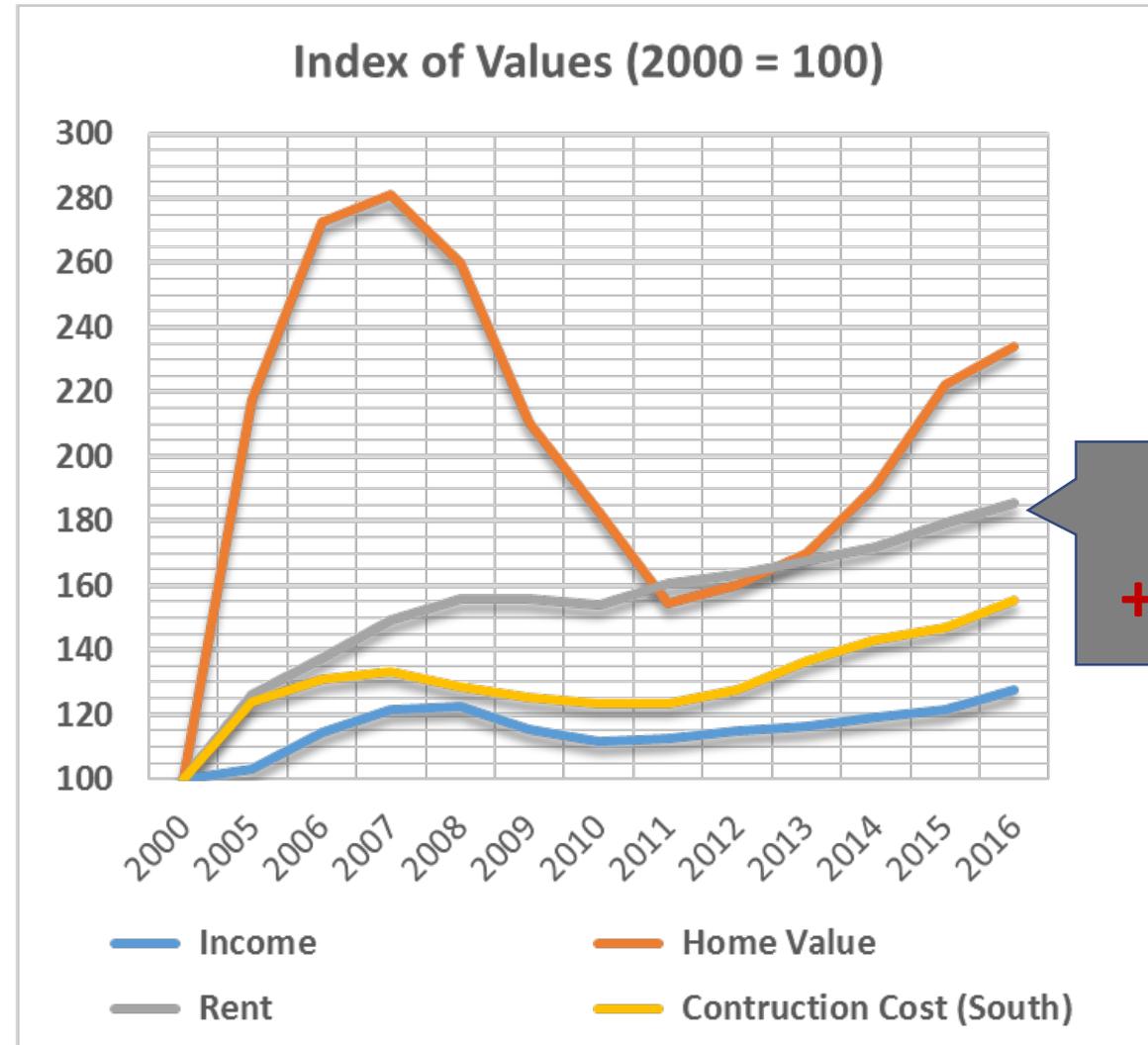
## County Trends

- The chart to the right shows price and cost indices for income, rent, home values, and construction costs. The values of each variable was set to 100 in the year 2000 in order to facilitate a direct comparison of the change in the values over time.
- It can be clearly seen how far the growth of incomes in Miami-Dade County lags behind the other variables between 2000 and 2016.



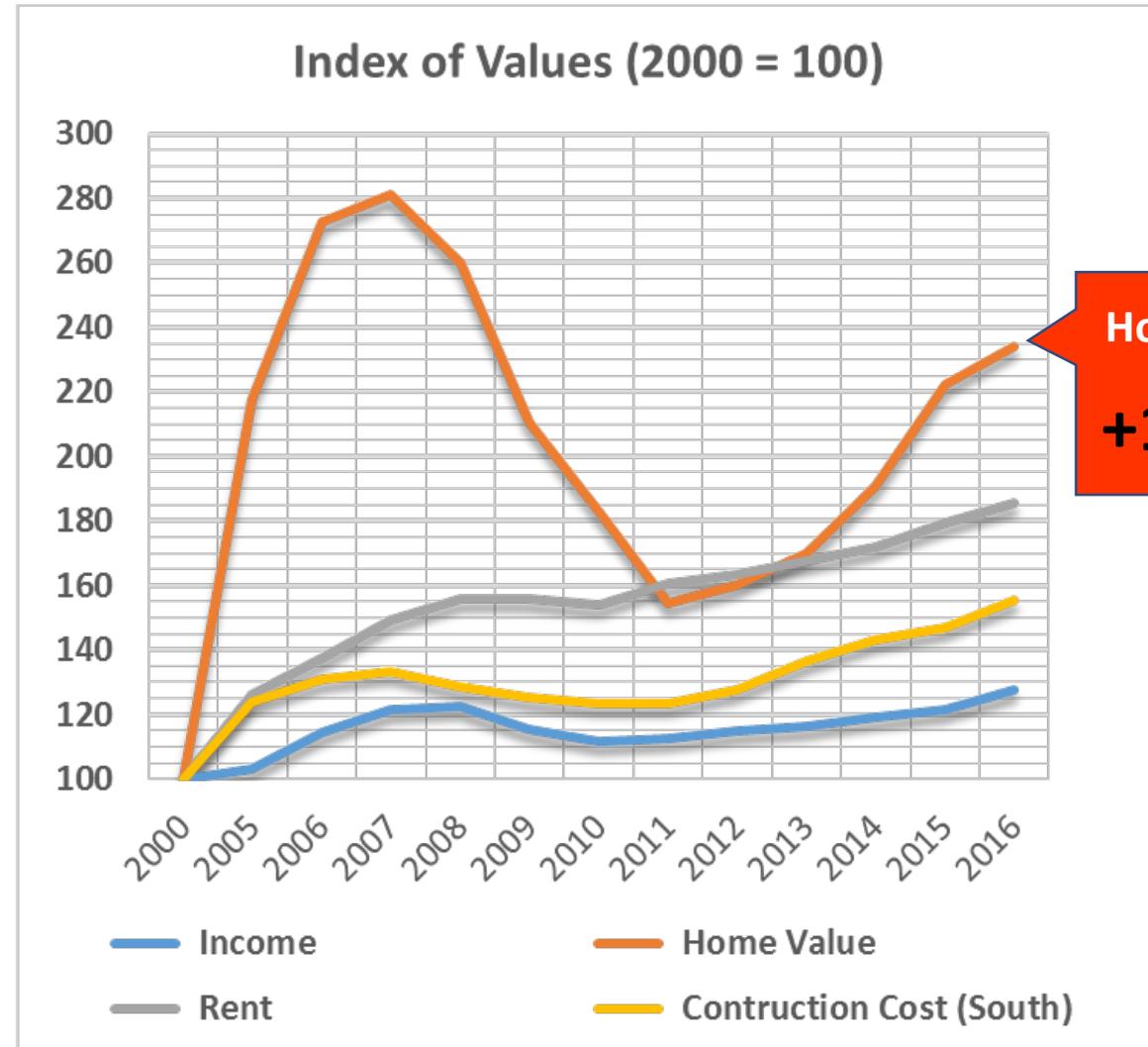
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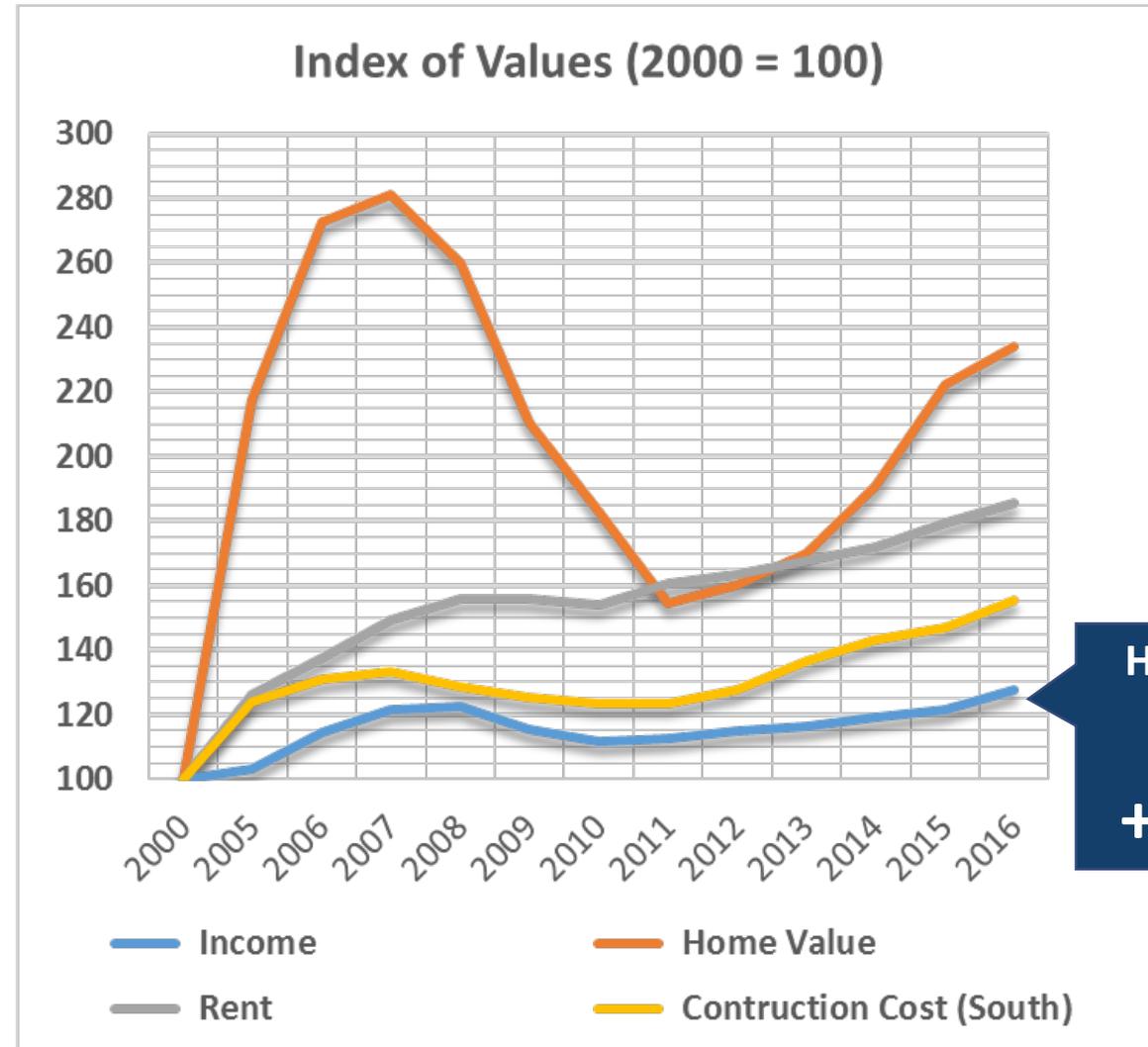
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## County Trends

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- It can be clearly seen how far the growth of incomes in Miami-Dade County lags behind the other variables between 2000 and 2016.



## County Trends

- The table to the right shows the compound annual growth rate of jobs from 2010 to 2016 and the 2016 average annual wage by Miami-Dade County Sector.
- Only 2 of the 10 fastest growing sectors paid an average annual wage greater than the county average.
- The two were the very small mining and extraction sector, and the much larger professional, scientific and technical services sector.

Compound Annual Growth Rates (2010-16) and Average Annual Wage

	Compound Annual Growth Rate	Rank	Average Annual Wage - 2016
<b>Total</b>	<b>2.6%</b>	<b>-</b>	<b>60,210</b>
Ag, F			
Mini	Mining, Quarrying, and Extraction		8.1%   1   77,283
Utili	Construction		5.5%   2   24,690
Cons	Real Estate and Rental and Leasing		4.9%   3   25,484
Man	Accommodation and Food Services		4.9%   4   14,995
Whc	Admin. Support and Waste Management		4.5%   5   21,568
Reta	Educational Services		4.3%   6   16,047
Tran	Transp. and Warehousing		3.9%   7   41,488
Info	Prof., Scientific, and Tech.		3.6%   8   95,648
Fina	Arts, Entertainment, and Recreation		3.3%   9   44,928
Real	Retail Trade		2.9%   10   20,801
Prof	Educational Services		4.3%   6   16,047
Mng	Health Care and Social Assistance		2.1%   14   31,984
Adm	Arts, Entertainment, and Recreation		3.3%   9   44,928
	Accommodation and Food Services		4.9%   4   14,995
	Other Services (except Public Admin.)		2.2%   13   15,755
	Public Administration		-1.1%   19   67,915

## Affordable Housing in Miami-Dade County

# County Trends

- The weighted average annual wage for the jobs created between 2010 and 2016 was just \$33,434. This is nearly \$27,000 per year below the 2016 countywide average.

If one could find it, this annual income would be approximately enough to support the purchase of a

**\$115,000 House**

Compound Annual Growth Rates (2010-16) and Average Annual Wage

	Compound Annual Growth Rate	Rank	Average Annual Wage - 2016	
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	Public Administration	-1.1%	19	67,915

## County Trends

- The largest industry in terms of employment in 2016 was health care and social assistance. The 2016 average annual wage was \$31,984.

This annual income would be approximately enough to support the purchase of a

**\$112,000 House**

Compound Annual Growth Rates (2010-16) and Average Annual Wage

	Compound Annual Growth Rate	Rank	Average Annual Wage - 2016	
<b>Total</b>	<b>2.6%</b>	<b>-</b>	<b>60,210</b>	
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	Other Services (except Public Admin.)	2.2%	13	15,755
	Public Administration	-1.1%	19	67,915

## Affordable Housing in Miami-Dade County

# County Trends

- The arts, entertainment and recreations sector grew 3.3% per year between 2010 and 2016. The 2016 average annual wage was \$44,928.

This annual income would be approximately enough to support the purchase of a

**\$155,000 House**

Compound Annual Growth Rates (2010-16) and Average Annual Wage

	Compound Annual Growth Rate	Rank	Average Annual Wage - 2016
<b>Total</b>	<b>2.6%</b>	<b>-</b>	<b>60,210</b>
Ag, F			
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	Accommodation and Food Services		4.9%   4   14,995
	Other Services (except Public Admin.)		2.2%   13   15,755
	Public Administration		-1.1%   19   67,915

# County Trends

- The highest wage sector among the top-ten-fastest-growing sectors (excluding mining) was professional, scientific and technical services. The 2016 average annual wage was \$95,648.

This annual income would be approximately enough to support the purchase of a

**\$325,000 House**

Compound Annual Growth Rates (2010-16) and Average Annual Wage

	Compound Annual Growth Rate	Rank	Average Annual Wage - 2016	
<b>Total</b>	<b>2.6%</b>	<b>-</b>	<b>60,210</b>	
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Real	Retail Trade			20,801
Prof	Educational Services	4.3%		
Mng	Health Care and Social Assistance	2.1%		
Adm	Arts, Entertainment, and Recreation	3.3%		
	Accommodation and Food Services	4.9%		
	Other Services (except Public Admin.)	2.2%		
	Public Administration	-1.1%		

The median single-family home sales price last year was:

**\$328,000**

## Is Affordability Simply a Function of Supply & Demand?

- Residential Construction Costs.
- Psychological Price Momentum.
- International Investors.
- Speculative Investors.
- Amenities.
- Densities.

## Solutions?

- Innovative zoning approaches.
- Effective inclusionary zoning.
- Enhance the quality of jobs including wages and productivity.
- Community Land Trusts.
- Public-Private Partnerships to leverage redevelopment projects.
- Transit improvements and TOD inside the infill area.

**Miami-Dade County**  
**Department of Regulatory and Economic Resources**

Jack Osterholt, Director

Lourdes Gomez, Deputy Director

Jerry Bell, Assistant Director of Planning

Manuel Armada, Chief, Planning Research and Economic Analysis

Copies of this presentation are available from:

**The Planning Research and Economic Analysis Section**

Stephen P. Clark Center, Suite 1220

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# Land Use/Housing Needs and Relationship to Urban Expansion Area

Miami-Dade County Urban Expansion Area Task Force

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# My Background

- ▶ Professional Planner - 30+ Years Experience in Florida
- ▶ Planning Director - Stearns Weaver Miller
- ▶ Former Planning Director - Greenberg Traurig
- ▶ Masters in Urban and Regional Planning
- ▶ Certified by the American Institute of Certified Planners
- ▶ 19 Years in Public Practice
- ▶ Former DCA Regional Administrator
- ▶ Directed DCA Review of Miami 1995 and 2003 EARs/EAR-Based Amendments
- ▶ Negotiated Tier and Urban/Metropolitan Center Policies
- ▶ Represent Private and Public Sector Clients

# Presentation

- ▶ Urban Development Boundary
- ▶ Urban Expansion Area
- ▶ EAR Process
- ▶ Statutory Changes Impacting Land Use Allocation
- ▶ Methodology Concerns
- ▶ Planning for Unincorporated Area

# Urban Development Boundary (UDB) Policy LU-8F

- ▶ Residential
  - ▶ Countywide development capacity for 10 years after EAR plus 5-year surplus (15 years)
  - ▶ Includes capacity to develop/redevelop around transit stations at densities recommended by Policy LU-7F
- ▶ Non-Residential
  - ▶ Countywide supply (no specified timeframe)
  - ▶ Census Tracts/MSA - Neighborhood and community oriented business and office
  - ▶ Tiers/Half-Tiers - Industrial and regional commercial

# Policy LU-8G - Priority for Inclusion in UDB

- ▶ Applies after Countywide “need” determination per Policy LU-8F
- ▶ Areas prioritized for inclusion in UDB:
  - ▶ Land within Tiers having the earliest projected supply depletion year
  - ▶ **Land within the UEAs and contiguous to the UDB**
  - ▶ Locations within one mile of a planned urban center or extraordinary transit service
  - ▶ Locations with projected surplus service capacity or where necessary facilities and services can be readily extended

# Policy LU-8G - Avoidance Areas

- ▶ Areas to be *avoided* for inclusion in UDB:
  - ▶ Future Wetlands (delineated in Future Land Use and Conservation Elements)
  - ▶ Agricultural lands designated on FLUM (except in Urban Expansion Areas)
  - ▶ CHHAs east of Atlantic Coastal Ridge
  - ▶ CERP project footprints delineated in Tentatively Selected Plans and/or Project Implementation Reports

# Policy LU-8G - Prohibited Areas

- ▶ Prohibited for inclusion in UDB:
  - ▶ Northwest Wellfield Protection Area - west of Turnpike Extension between Okeechobee Road and NW 25<sup>th</sup> Street
  - ▶ West Wellfield Protection Area - west of SW 157<sup>th</sup> Avenue between SW 8<sup>th</sup> Street and SW 42<sup>nd</sup> Street
  - ▶ Water Conservation Areas, Biscayne Aquifer Recharge Areas, Everglades Buffer Areas
  - ▶ Redland Area south of Eureka Drive
  - ▶ Accident Zones at Homestead Air Reserve Base

# 2011 Evaluation and Appraisal Report (Resolution R-213-11)

- ▶ Countywide residential supply - exhausted by 2021
  - ▶ Countywide single family supply - exhausted by 2016
  - ▶ Countywide multifamily supply to be exhausted by 2026
- ▶ Redevelopment capacity included for first time
- ▶ To accommodate Countywide residential demand until 2026, proposed EAR-based amendments will:
  - ▶ **First, address appropriately increasing residential densities and intensities inside the existing UDB;**
  - ▶ Second, modifying existing UEAs to realistically reflect future development potential;
  - ▶ Third, propose expanded or new UEA boundaries when warranted; and
  - ▶ Fourth, expand the UDB into UEAs as warranted to address any deficiency in land supply not addressed by first step

# 2012 Evaluation and Appraisal Report (EAR) Based Plan Amendments

- ▶ No change to UDB, except for inclusion of Hole in Donut site.
- ▶ FLUM changes within incorporated areas to reflect municipal land use designations.
- ▶ BCC directed to increase density in urban centers to provide additional supply to accommodate projected 2026 population.
- ▶ Allocation was marginal then based on conservative population projections following recession.

# EAR Process Must Evaluate Impact of Statutory Changes

- ▶ Community Planning Act (2011) and subsequent statutory changes significantly impact the land use allocation process
  - ▶ Population projections - proportionate allocation
  - ▶ Minimum 10-year allocation requirement
  - ▶ Allocations required for unincorporated area
  - ▶ Allocations must consider job creation, capital investment and economic diversification
  - ▶ Antiquated development patterns
  - ▶ Planned development strategies
  - ▶ Operation of real estate market

# Minimum 10-Year Planning Period

- ▶ Section 163.3177(1)(f)3 requires a minimum 10-year planning period.
- ▶ The CDMP requires an initial 10-year UDB allocation (after last EAR) plus a five year surplus.
- ▶ Why is that a problem?
  - ▶ EAR/EAR-based amendments occur on 7-year cycle.
  - ▶ What is the current planning period for the UDB?  
Answer: three years through 2021.
- ▶ CDMP should maintain a minimum 10-year planning period implemented on a sustained basis.
- ▶ CDMP does not maintain a long range planning strategy. MDC should adopt at least a 20-year horizon. This will maintain a minimum 13-year horizon between updates.

# Proportionate Population Projections

- ▶ Section 163.3177(1)(f)3, F.S.

Absent physical limitations on population growth, population projections for each municipality, and the unincorporated area within a county **must**, at a minimum, be reflective of each area's **proportional share of the total county population and the total county population growth.**

- ▶ MDC methodology has historically allocated Countywide population by MSA without regard to incorporated versus unincorporated boundaries.

# Proportionate Land Use Allocations

- ▶ Section 163.3177(1)(f)3, F.S.

The plan must be based on at least the **minimum amount of land** required to accommodate the medium projections...

- ▶ Unincorporated Share of Countywide Population = 44%
- ▶ EAR-based amendments must plan land use allocations in the unincorporated area to accommodate 44% of Countywide population growth
- ▶ The 2012 EAR-based amendments did not increase density in the unincorporated area.
- ▶ 2012 population projections reflected recession effect and must now be adjusted to account for sustained post-recovery growth.

# Why is Proportionate Allocation Requirement Important?

- ▶ MDC needs differ between the incorporated and unincorporated areas.
  - ▶ Demographics
  - ▶ Housing Types/Affordability
  - ▶ Non-Residential Needs
  - ▶ Employment/Special Uses
  - ▶ Outdated development patterns
  - ▶ Job creation, capital investment and economic diversification
  - ▶ Infill/Redevelopment/Planned Development
- ▶ Community Planning Act recognizes these differences in requiring land use allocations to plan for the unique needs of each area.
- ▶ One size does not fit all!

# Affordable Housing Relationship to Population Projections

- ▶ Population projections are integrally related to land use, housing and economic policy.
- ▶ MDC population projections have historically reflected significant domestic outmigration. Affordable housing is one of the major “push” factors driving outmigration.
- ▶ EAR should identify policy intervention to address affordable housing to reduce outmigration, which should be reflected in a downward adjustment to projected outmigration.

# Housing Needs

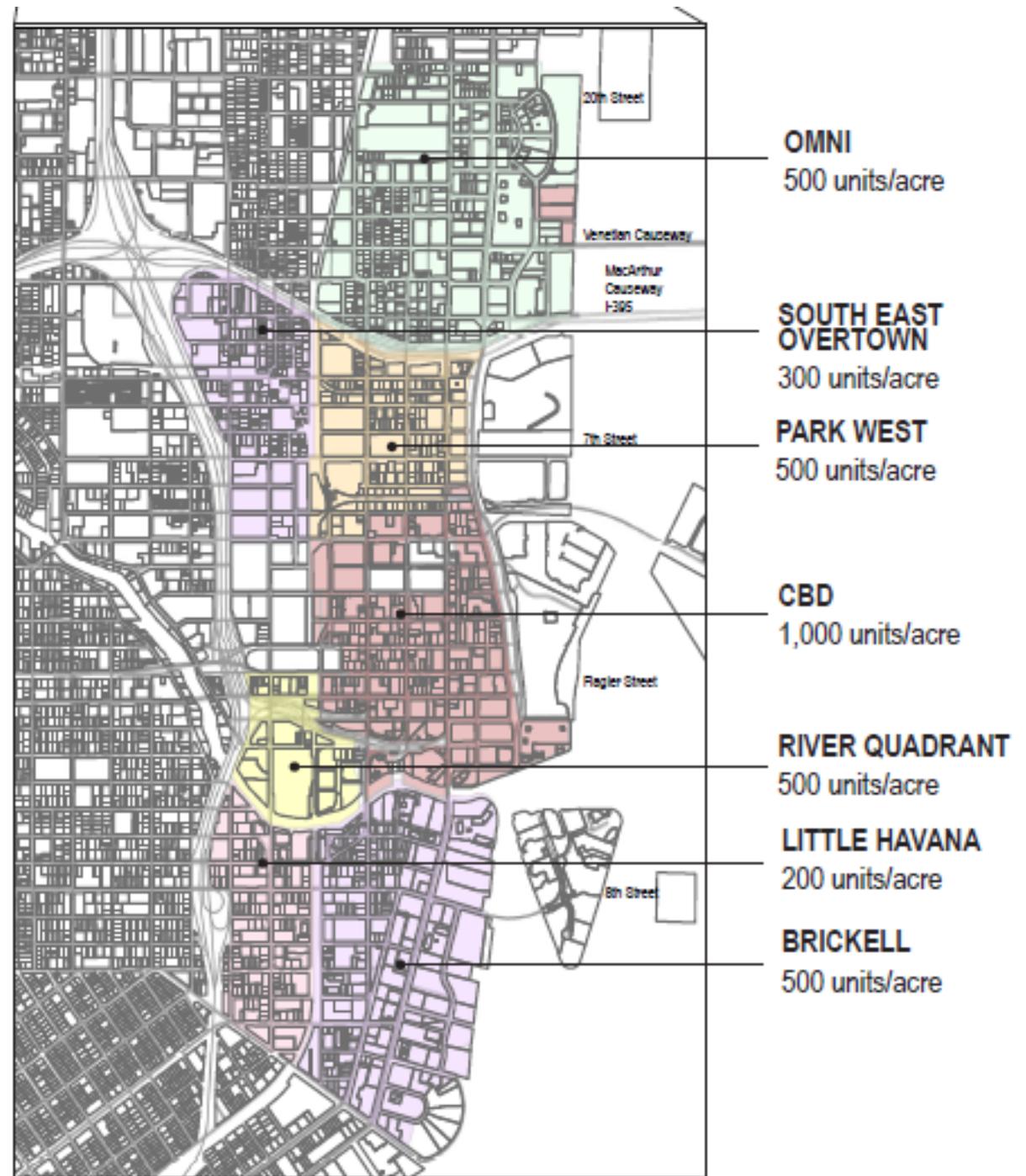
- ▶ MDC is one of the least affordable metro areas in the entire country.
  - ▶ 2<sup>nd</sup> highest percentage of cost burdened households among major US metros.
  - ▶ Highest percentage of cost burdened rental households among major US metros.
  - ▶ 2<sup>nd</sup> highest on Income Equality Index among major US metros.
  - ▶ % cost burdened is higher in the urban core.
- ▶ **2010 EAR Findings** (staff findings approved by BOCC):
  - ▶ Uncertainty and instability due to the **severe mismatch** between the upscale housing production and the unmet affordable housing demand.
  - ▶ Affordable housing **imbalance** has been exacerbated by the loss of rental housing to conversion and decline in rental housing production.
  - ▶ **Land Use and housing policy at the local level affects the expansion of housing supply**, in particular in the affordable housing range.

# Residential Land Use Allocations

- ▶ How does a \$3M penthouse in downtown Miami or on Miami Beach relate to affordable housing needs? It reserves supply at the expense of affordable housing opportunities and the unincorporated area.
- ▶ Supply includes substantial allocations for “upscale” multifamily in CBD, Omni, Brickell, etc. based on Miami 21 zoning.
- ▶ Multifamily supply is severely limited in the unincorporated area. Yet, multifamily absorption rates reflect slow absorption. Why?
  - ▶ Limited supply/opportunities creates pent-up, unsatisfied demand.
  - ▶ Market reality: some sites are rejected size constraints, neighborhood conditions, compatibility, etc. Reserving supply for obsolete sites is counterproductive.
  - ▶ Supply analysis has not considered tenure (ownership vs. rental).
  - ▶ Supply analysis has not differentiated by type of multifamily (townhouse, garden apartments, medium/high rise, and mixed use).
  - ▶ Supply analysis has not attempted to spatially match household income and housing opportunities.

## ► Miami 21

- Many of these sites are Business Office on the CDMP FLUM.
- Business Office allows residential, but 2010 EAR indicated that only residential and agricultural would count toward residential supply.
- 2010 EAR confirms that the primary purpose of the Business Office land use category is for commercial development.
- Supply calculations rely primarily on zoning to determine land use allocations.
- These allocations should not function as a limitation on residential supply in the unincorporated area.
- See following examples.



▶ Example of Downtown Allocation

▶ River Quadrant Sub-Area

▶ County Future Land Use: Business Office

▶ City Future Land Use: Restricted Commercial

▶ City Zoning: T6-36

▶ 636 DUs/3.2 acres = 199 DU/Acre

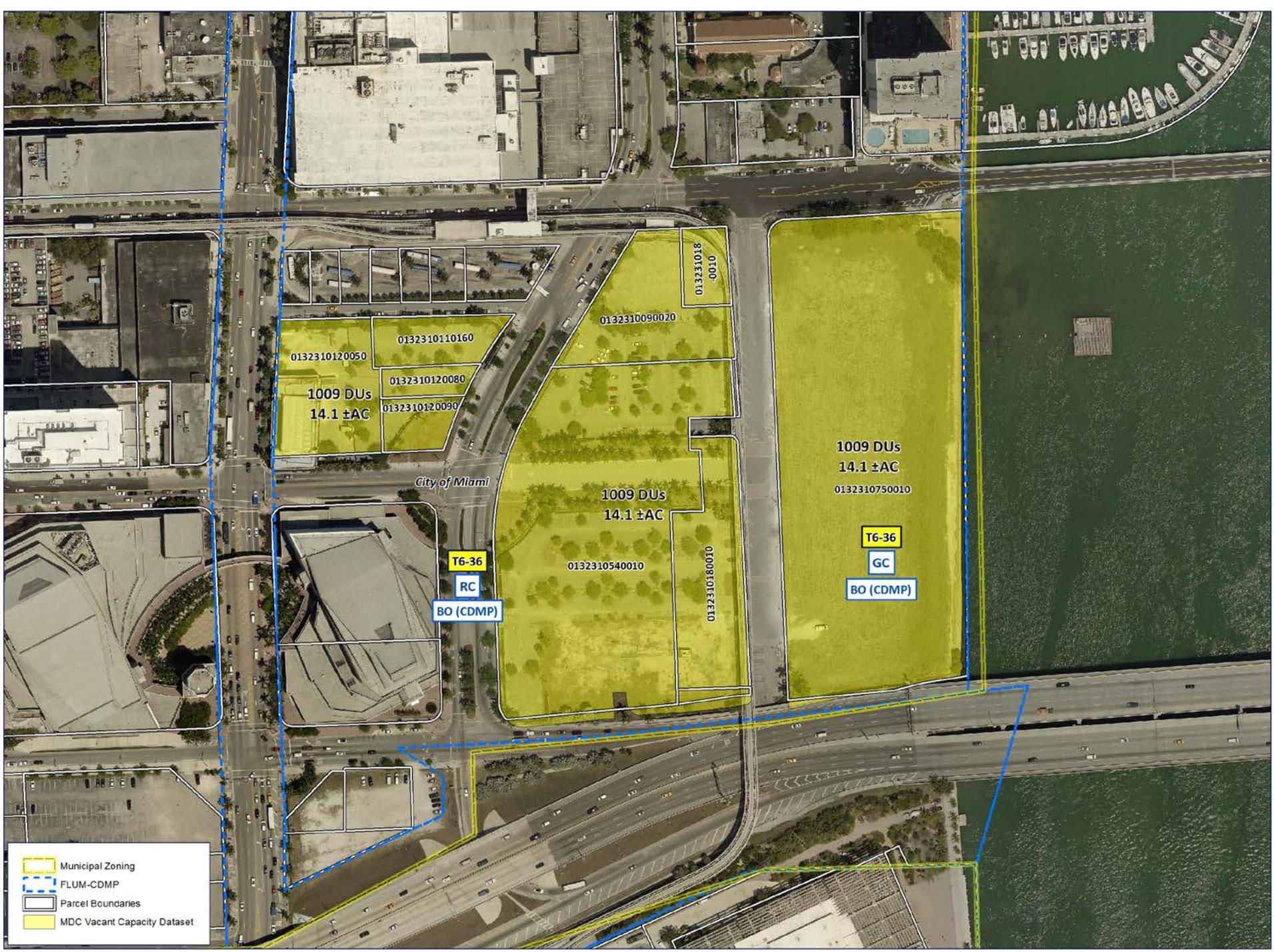
▶ Quad: Allows maximum of 500 DU/Acre

▶ Zoning allows residential and non-residential

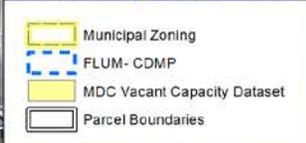
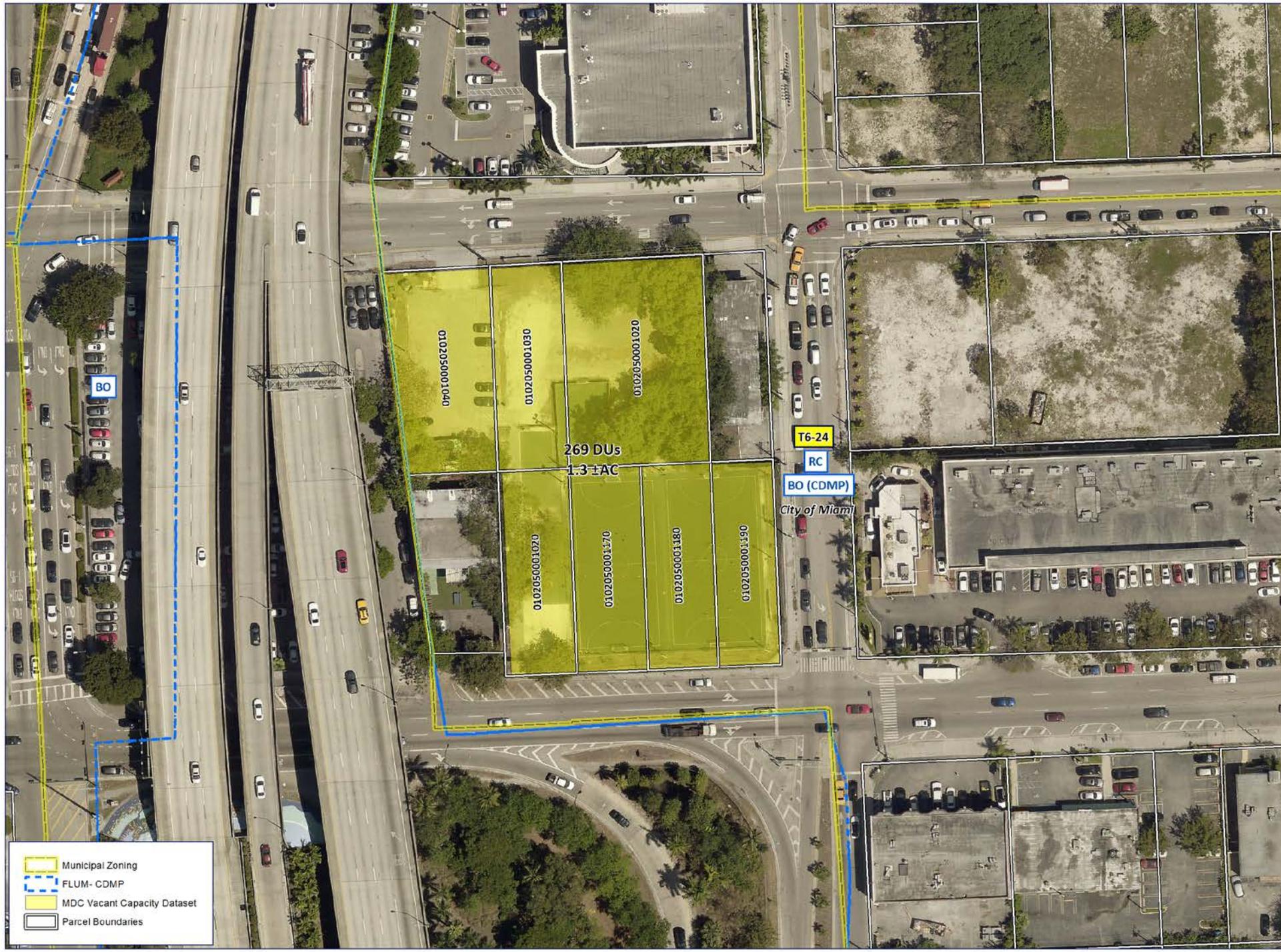
▶ Subject to other design criteria affecting development potential



- ▶ Example of Downtown Allocation
- ▶ Omni Sub-Area
- ▶ County Future Land Use: **Business Office**
- ▶ City Future Land Use: General Commercial and Restricted Commercial
- ▶ City Zoning: T6-36
- ▶ 1,009 DUs/14.1 acres = 72 DUs/Acre
- ▶ Omni: Allows maximum of 500 DU/Acre
- ▶ Miami 21 allows residential and non-residential
- ▶ Subject to other design criteria affecting development potential



- ▶ Example of Downtown Allocation
- ▶ Little Havana Sub-Area
- ▶ County Future Land Use: Business Office
- ▶ City Future Land Use: Restricted Commercial
- ▶ City Zoning: T6-24
- ▶ 269 DUs/1.3 acres = 207 DU/Acre
- ▶ Little Havana Sub-Area allows maximum density of 200 DUs/Acre
- ▶ Miami 21 allows residential and non-residential
- ▶ Subject to other design criteria affecting development potential



# Realistic Supply Assumptions Are Critical

- ▶ **2010 EAR** identified need to establish mixed use percentages for categories such as Business and Office and Office/Residential. Supply assumptions are arbitrary without controlling percentages.
- ▶ County categories are aggregated into the following SC Classifications as part of the MDC Land Use Management process. Residential supply breakdown from 2017 County data sets:

UNINCORPORATED VACANT			
SC CODE	SC DESCRIPTION	UNITS	PCT
1	RESIDENTIAL SINGLE FAMILY	14,741	35.0%
2	RESIDENTIAL MULTY FAMILY	17,890	42.5%
3	INDUSTRIAL	0	0.0%
4	OFFICE	0	0.0%
5	BUSINESS	0	0.0%
6	HOTEL	0	0.0%
7	REMAINDER	0	0.0%
8	MIXED OFFICE-RESIDENTIAL	204	0.5%
9	MIXED INDUSTRIAL-RESIDENTIAL	2,060	4.9%
10	MIXED BUSINESS-RESIDENTIAL	7,196	17.1%
Unincorporated DU Total:		42,091	

INCORPORATED VACANT			
SC CODE	SC DESCRIPTION	UNITS	PCT
1	RESIDENTIAL SINGLE FAMILY	15,741	16.0%
2	RESIDENTIAL MULTY FAMILY	42,920	43.7%
3	INDUSTRIAL	0	0.0%
4	OFFICE	0	0.0%
5	BUSINESS	0	0.0%
6	HOTEL	0	0.0%
7	REMAINDER	0	0.0%
8	MIXED OFFICE-RESIDENTIAL	1,992	2.0%
9	MIXED INDUSTRIAL-RESIDENTIAL	88	0.1%
10	MIXED BUSINESS-RESIDENTIAL	37,477	38.2%
Incorporated DU Total:		98,218	

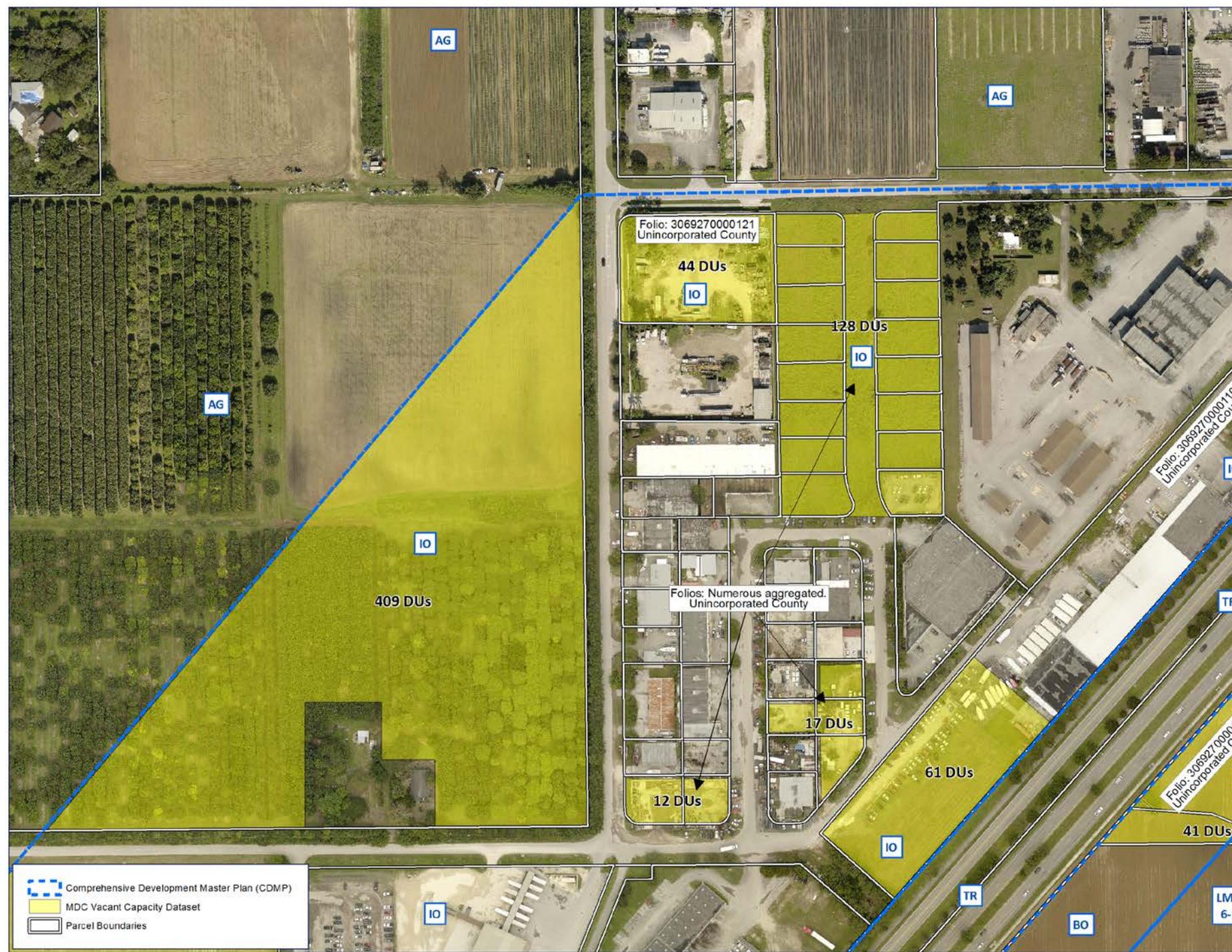
- ▶ Over 1/3 of Countywide residential supply is assumed based on non-residential land use categories, such as Business Office and Industrial Office.

# Realistic Supply Assumptions Are Critical

- ▶ Business and Office land use category policies govern density based on surrounding land use designations and existing uses. Fails to provide predictable outcomes and guidelines for future land use.
- ▶ The CDMP provides the following statement regarding residential in the Industrial and Office land use category:

In general, the typical residential development is incompatible with major industrial concentrations and **shall not occur in areas designated as “Industrial and Office”** on the LUP.
- ▶ CDMP allows limited exceptions for live work/adaptive reuse in light industrial areas, TND sites, and sites less than 10 acres or located at the perimeter of the Industrial Office area, provided site is adjacent is existing or platted residential.
- ▶ Vacant Industrial Office lands should not be included in the residential land use allocation.
- ▶ MDC LUMA allocates 2,000+ units to the Industrial Office category as illustrated by the following example.

- ▶ Designated Industrial Office on Future Land Use Map
- ▶ Allocates 666 DUs to various Industrial Office parcels.
- ▶ Allocation does not conform to limited Industrial Office exceptions.
- ▶ Storage use and other activities occur on properties deemed vacant.





# Non-Residential Land Use Allocations

- ▶ Generalized for Commercial, Office and Industrial.
- ▶ Does not consider unique land uses that don't easily fit into the three categories.
- ▶ Does not support economies of scale or encourage clustering to support specialized centers (i.e., Lake Nona Medical Center in Orlando).
- ▶ Separation of distinct residential and non-residential allocations discourages mixed use.
- ▶ Absorption methodology subject to same problem as residential:
  - ▶ Limited supply/opportunities creates pent-up, unsatisfied demand.
  - ▶ Market has rejected sites due to location, size constraints, neighborhood conditions, compatibility, etc. Reserving supply for obsolete sites is counterproductive.

# Other Major Concerns - Permitted Projects and Redevelopment

- ▶ Lack of policy directive or empirical supporting data and analysis to support allocation criteria:
  - ▶ Counting 100% of permitted project once started.
  - ▶ Counting 50% of permitted project prior to start of construction.
    - ▶ Statutory extensions are common and extend projects beyond short term planning periods.
    - ▶ Latter phases are often abandoned for due to market conditions, costs and other constraints.
- ▶ Redevelopment criteria
  - ▶ Supported conceptually, but will primarily provide supply for the incorporated area.
  - ▶ Empirical evidence needed to support assumption that redevelopment will occur within the planning horizon.

# Scale and Design Matter

- ▶ Small scale parcels potentially serve only certain limited land use types (i.e., small residential developments and individual stores and offices).
- ▶ Small scale parcels do not support the ability to achieve clustered, specialized nodes.
- ▶ Analysis confirms limited opportunities are available to assembly vacant parcels within the urban core.
- ▶ Small scale parcels do not allow for Planned Developments, such as Urban Villages that have been effectively utilized in other metros to support affordable housing and transit objectives.
- ▶ Urban Centers, Metropolitan Urban Centers and Community Urban Centers allow for higher densities and intensities, but require more acreage in suburban areas to achieve compatible design.

# UEAs Provide Opportunity to Implement CDMP Objectives in Unincorporated Suburban Areas

- ▶ Land assembly has occurred within the UEA in response to the CDMP policy direction. UEAs provide unique opportunities not otherwise achievable within isolated, smaller scale properties.
- ▶ UEA provides an opportunity to implement urban villages in keeping with MDC smart corridor strategy. UEAs provide opportunity to anchor the west end of transit corridors.
- ▶ Larger scale properties provide the design flexibility to achieve transit supportive densities/employment intensities, reduce transportation costs, provide affordable/attainable housing, provide a downtown sense of place, and achieve compatibility densities at the edge.
- ▶ UEAs are given priority for inclusion in the UDB due to these unique advantages and should be supported and enhanced as a fundamental strategy for achieving smart growth in the western part of the County.

# Conclusions

- ▶ CDMP policy framework does not adequately address residential and non-residential allocations for the unincorporated area.
- ▶ CDMP policy framework must be adjusted to account for statutory changes.
- ▶ Plan horizon should be extended to 20 years.
- ▶ Population projections must allocate the unincorporated area its proportionate share of Countywide population growth and supply for the plan horizon.
- ▶ Policies should be adopted to specifically define mixed use percentages or other criteria to guide how mixed use land use categories will develop.
- ▶ Methodology assumptions should be comprehensively re-evaluated based on statutory requirements and revised CDMP policy guidance.
- ▶ Allocation process should account for the unique land use needs of the unincorporated area.
- ▶ Allocation process should be reformed to encourage planned, mixed use urban villages in the unincorporated area rather than rely on incremental, small scale density increases.

# Questions

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