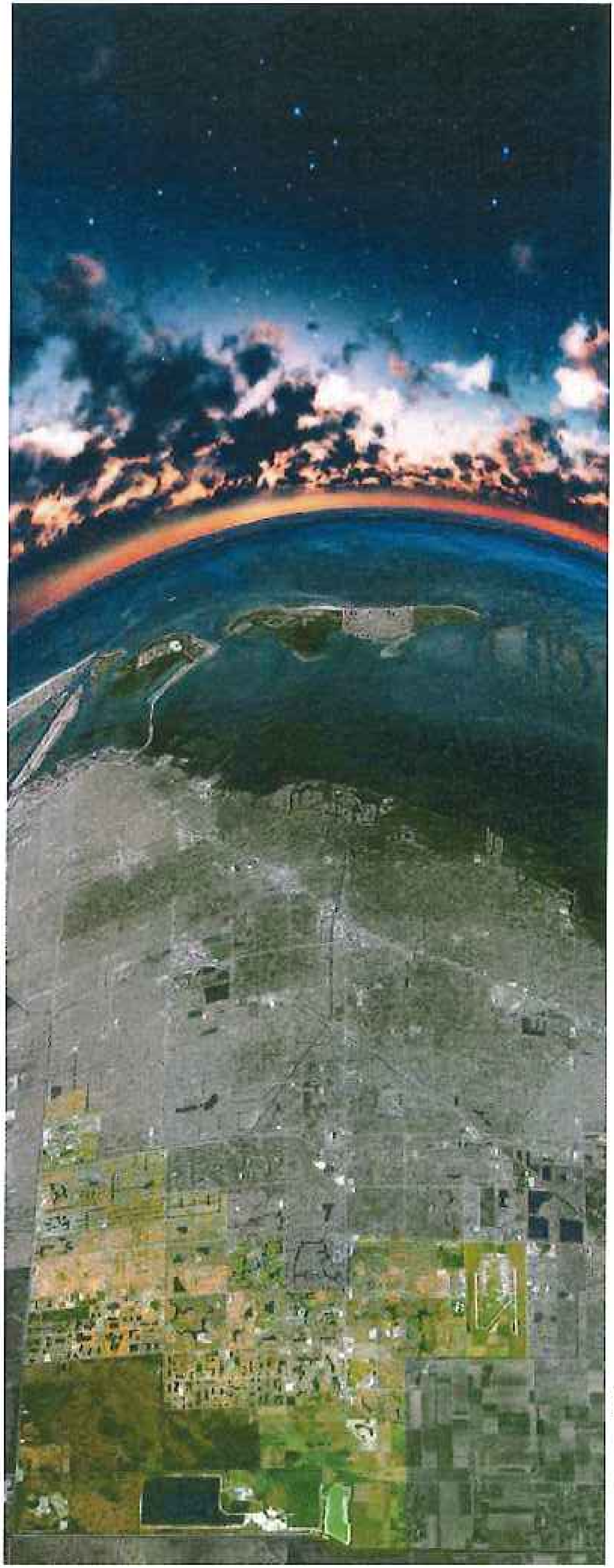

Funded Research Report

WEST END STRATEGY: A VISION FOR THE FUTURE
Miami-Dade County, Florida

Full Report

Submitted to the residents of the
West End and Office of Commissioner
Juan C. Zapata, District 11
Miami-Dade County, Florida

MIAMI-DADE COUNTY
BOARD OF COUNTY COMMISSIONERS

FIU By Design
COLLEGE OF ARCHITECTURE + THE ARTS

This study is published as part of the research conducted by FIU by Design for a Community Engagement grant commissioned by Commissioner Juan C. Zapata of District 11, unincorporated Miami-Dade County, Florida, USA.

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This study was made possible with the generous support of the District 11 community. Contributors included major stakeholders, private citizens, businesses and community representatives from across the District. A full list of study participants and donors is included below. The faculty, staff, and administration at Florida International University and the office of Commissioner Juan C. Zapata worked together to develop and review the study. We are especially grateful for the input and resources of the following Miami-Dade County departments: Metropolitan Planning Organization, Parks & Recreation, and Planning & Zoning.

The study funded 14 graduate students working as graduate research assistants in multiple departments at the university. Participating in advanced research projects is an important aspect of graduate education and a keystone for building better futures for our next generation of researchers.

Finally, we would like the many experts, concerned citizens, community organizations, institutions, and stakeholders that met with our team over the course of the study. Their input, feedback, and review were invaluable. They are too numerous to list here, but a brief list is included below.

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Contributors

Downrite Engineering Corp (Lennar)
Friends of Higher Education
Gazitua Letelier PA
Adolfo and Elizabeth Henriques
Howard Hughes Corporation
Latin Builders Association, Inc.
Lennar Homes
Limonar Development Inc.
Yara Lorenzo
Eston E Melton III
Miami Municipal Strategies LLC
Munilla Family Foundation
Neighborhood Planning Company, LLC
Parks Foundation of Miami-Dade
West Flagler Associates LTD
Wonderly Holding Inc.
Juan C. Zapata

FIU Participants

FIU School of Architecture

Dean Brian Schriner, College of Architecture + The Arts
Dr. Winifred E. Newman, Primary Investigator, Architecture
Kevin Greiner, Co-Investigator, Research Fellow FIU Metropolitan Center
Prof. Roberto Rivera, Sr. Investigator, Chair of Landscape Architecture
Rashida Taylor, Coordinator Budgeting
Lilia Silverio-Minaya, Director, Finance and Administration
Maria Garcia, Office Asst. for School of Architecture
Priscilla Pagan, Graduate Research Assistant, Architecture
Giovanna Gallardo, Research Assistant, Architecture
Delia Rivera, Graduate Research Assistant, Architecture
Kevin Hutchinson, Graduate Research Assistant, Architecture
Hermann Gonzales, Graduate Research Assistant, Architecture
Silvana Herrera, Graduate Research Assistant, Architecture
Stephania Soltau, Research Assistant, Architecture
Daniela Gonzales, Graduate Research Assistant, Landscape Architecture
Johanna Bahamon, Graduate Research Assistant, Landscape Architecture
Johanna Ibarra, Graduate Research Assistant, Landscape Architecture
Christopher Cabezas, Graduate Research Assistant, Landscape Architecture
Devin Cejas, Graduate Research Assistant, Landscape Architecture

FIU College of Engineering & Computing

Dean Amir Mirman, College of Engineering & Computing
Dr. Xia Jin, Sr. Investigator, Civil and Environmental Engineering
Maria Benincasa, Asst. Dir. Rsrch. Prog. & Svcs.
Mario B. Rojas IV, Graduate Research Assistant, Engineering
Fengjiang Hu, Graduate Research Assistant, Engineering

FIU Metropolitan Center

Dr. Edward 'Ned' Murray, Assoc. Dir. Research Programs
Maria D. Ilicheva, Research Scientist

Office of Commissioner Juan C. Zapata, Miami-Dade County District 11

Juan C. Zapata, County Commissioner
Stephanie Cornejo, Commission Aide
Daniel Chatlos, Commission Aide
Bianca S. Caviglia, Commission Aide
Alvaro J. Muñiz, Commission Aide
Bernardo Escobar, former Chief of Staff

Miami-Dade County Departments

Metropolitan Planning Organization
Department of Planning & Zoning
Information Technology Department
Park & Recreation Department
Miami-Dade Transit
Department of Regulatory and Economic Resources

Additional Organizations

South Florida Regional Planning Council
The Beacon Council
MDX
Florida Department of Transportation
Everglades Coalition
Florida Governmental Affairs, LLC
Summit Group Properties
Valle & Valle
Fernandez - Beraud INC


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FOREWARD

This study was initiated at the request of District 11 Commissioner Juan C. Zapata in Fall 2013 with President Mark Rosenberg of Florida International University. As one of the major institutions in the West End district and an active partner in community engagement in South Florida, FIU Florida organized a diverse group of faculty from Architecture, Landscape Architecture, Engineering, Urban Planning and Public Administration, and Traffic Engineering to develop this Strategic Action Agenda. A note about two terms used throughout the report: the "Study" refers to the process by which conclusions were made; "Report" refers to the document consequently produced herein.

Defining the West End

Miami-Dade County's ***West End*** is defined in this report as the collection of communities within and adjacent to County Commission District 11. We delineated the West End as the area bound by Florida's Turnpike on the east, SW 152nd Street on the south, Krome Avenue on the west, and the Tamiami Trail (SW 8th Street) on the north.

Depending on data availability, the study refers alternatively to the West End, Commission District 11, and in some cases uses data for the zip codes that overlay Commission District 11 and the West End Communities (33175, 33183, 33184, 33185, 33186, 33193, 33194, 33196).

Why a Strategic Action Plan?

By all measures County Commission District 11 and the communities of the West End are a successful and thriving. The West End has enjoyed 15 years of steady development, its residents are highly educated and have above average incomes, and it enjoys a low crime rate, and has proven to be a particularly attractive destination for families relocating from all over the region and the world. Based on its history of success, it wouldn't seem a likely candidate for a strategic action plan. In other words, *"if it ain't broke don't fix it."*

There are, however, compelling reasons to develop a set of strategies for the future of the West End. They are:

- The West End Strategy Report is not meant to displace Miami-Dade County's Comprehensive Development Management Plan (CDMP), but to augment it. The CDMP is a particularly outstanding planning process with an extended (20 years or more) planning time frame. The West End Strategy Report is an opportunity to examine and respond to rapidly changing economic, demographic, environmental, and physical conditions with immediate solutions than are possible within the scope of the CDMP;

- The West End is a large community of over 213,000 people. In its broader context, it is a central part of a series of communities stretching from SR 836 to the Broward County line — a major, large, and growing urbanized corridor with population of nearly 600,000 living and working at the edge of the Everglades. Considered in this context, the importance and regional impacts of the corridor of communities west of the Florida Turnpike will only grow over time. Developing solutions that plan its growth in a sustainable and responsible manner is a critical responsibility;

- The West End, like much of Miami-Dade County, has rapidly "matured," approaching full build-out of its land area. *Unlike* other regions, Miami-Dade's land area is tightly constrained by the Atlantic Ocean and the Everglades. The region's continuing development will be focused inwardly, requiring different approaches to land use, development density, and transportation. The West End may well be a bellwether for these critical development issues shared by other parts of the region and beyond, and hopefully, a model for success and best practices, and;

- The Study is an opportunity to re-think the West End in terms of its unique assets, strengths, hidden value, position in the regional economy, and its role in addressing important County-wide objectives including economic diversification and structural change, and;

- ***West End 2.0***: Last, but by no mean least, the Study is an opportunity to re-think the West End in the context of the aspirations of its residents, who clearly enjoy the West End's many amenities and quality of life, but voiced a unified desire see it evolve into a much more livable, walkable, and urbane community.

West End Strategy Study Goals and Process

The FIU study Team's most important job was to help identify ways to leverage West End's many assets to:

- Grow the District as *One Of Miami's Most Distinctive and Livable Communities*;

- Create New Opportunity for Its Residents, and;

- Plan for the Future

The study process included the following components:

- Intensive research to key major national and regional trends affecting the future development of the District;
- A detailed examination of West End's position within the regional economy, and its key characteristics in 7 study areas: Population Dynamics, Land Use, Housing, Traffic and Transportation, Industry and Business, Environment and Greenspace, and Identity;
- A study of the District's major assets and a review of particular opportunities and market strengths that can be leveraged to create new opportunities for investment and job creation;
- Extensive Interviews with stakeholders from business, public sector leaders, community leaders, and local institutions, and;
- A survey of residents regarding their insight and opinion regarding important issues and opportunities facing the West End.

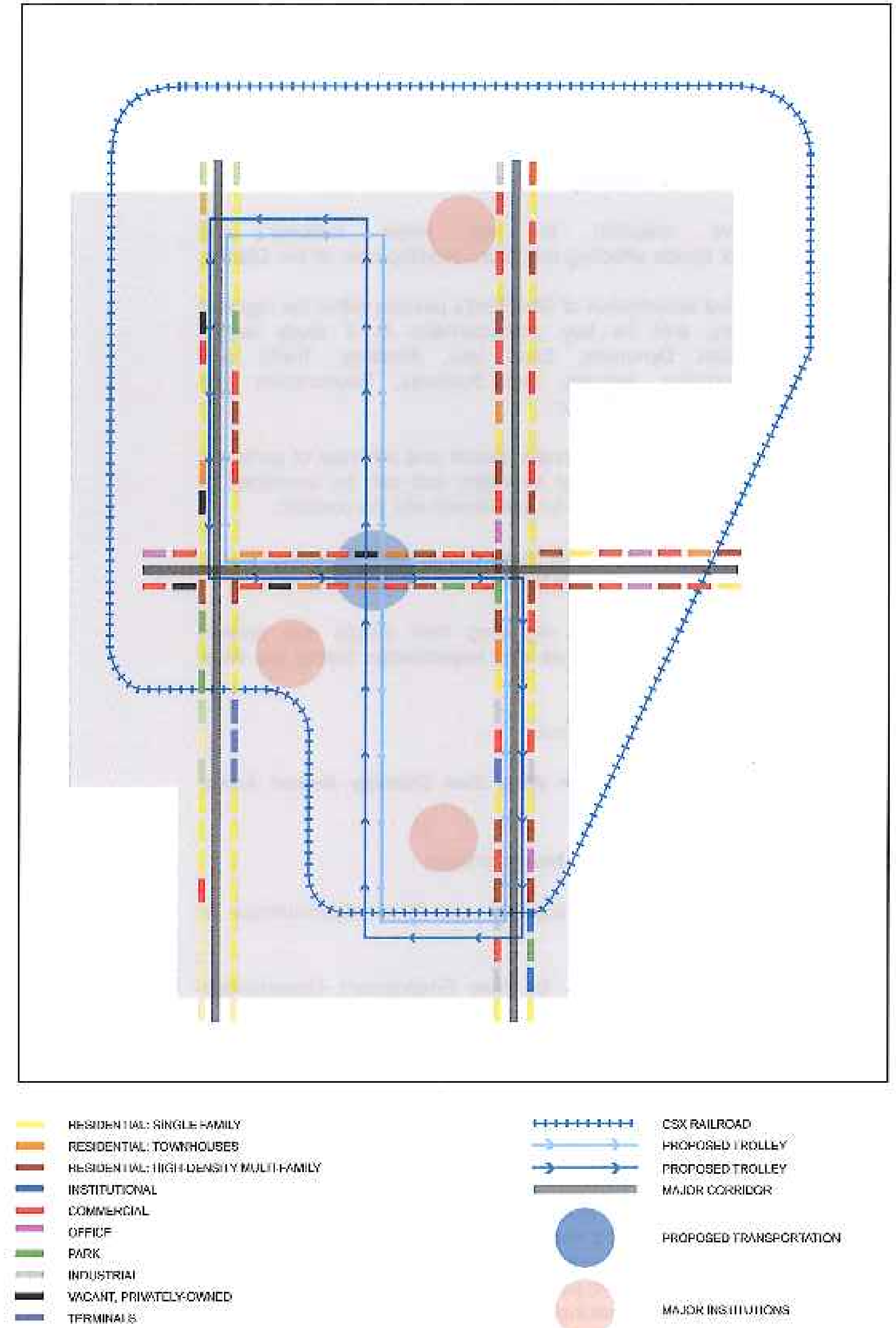
The West End Strategy Study Action Agenda

The results of the Study produced the ***West End Strategy Report*** Action Agenda - 15 Action Items in 6 Areas:

- Brand the District and its Neighborhoods
- Create Immediate Employment and Work Opportunities in the West End
- Leverage Major Assets for New Employment Opportunities
- Re-Connect the District Using Alternative Transportation, Place Making and Streetscape Design
- Transportation Capacity Investments and Policy
- Re-Think New and Future Development Patterns

The Action Agenda are clear, specific actions that can be implemented within the next 1 to 3 years. The Action Agenda responds to the issues and opportunities identified in the study process, market realities, practicality and ease of implementation. These are for the most part simple strategies that begin a process of change, but have important regional impacts.

THE WEST END CONNECTOR DIAGRAM



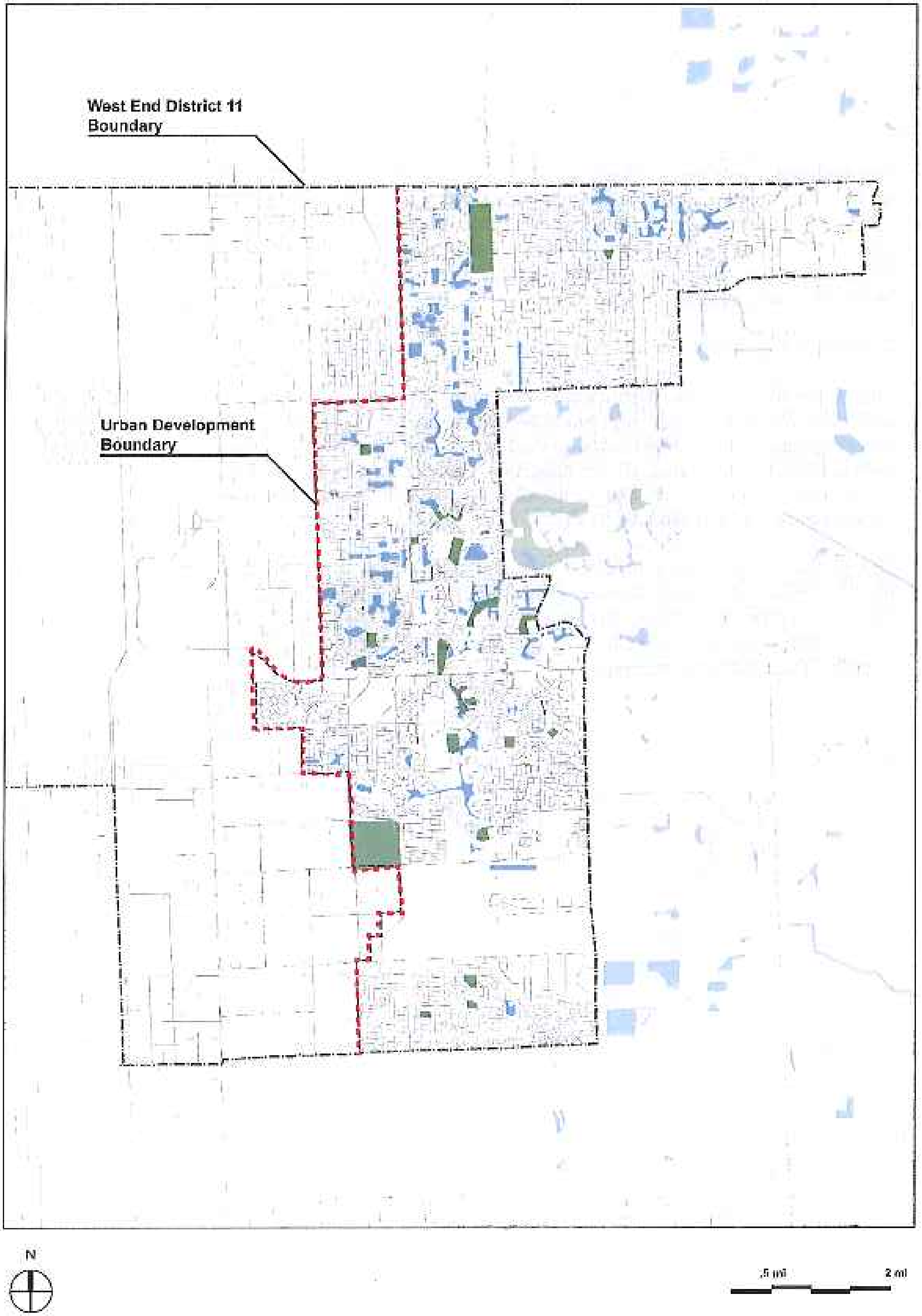
Certain issues were beyond the scope of this study which are also the subject of separate formal planning studies, including the extension of Route 836, the expansion of Krome Avenue, and long-term discussions regarding the County's Urban Development Boundary. However, solutions and recommendations produced in this study are clearly cognizant of, and responsive to, these important community issues.

Conclusions: A Unique Regional Asset

The single most important conclusion resulting from the Study is that West End will continue to be a highly desirable destination and place to live, with far reaching appeal in Florida and abroad. Additionally, the West End is 1) a unique regional community asset, 2) an important element in Miami's sustainable future, and 3) an critical linchpin in the County's plan to diversify, expand and improve the regional economic base.

Finally, the researchers and study participants hope that the study findings contribute to the regional discussion of sustainable community growth in Miami-Dade and Broward counties. No area is an island unto itself. The West End is part of the larger fabric of human and environmental interaction requiring sensitive and creative management.

DISTRICT 11 BOUNDARIES



STRATEGIC ACTION AGENDA

15 Action Items in 6 Areas

The West End Strategy Report details the study's key recommendations for the West End. The second part of the study, the West End Profile, discusses each focus area in depth and offers the dedicated reader our full analysis. The Appendices contain the compendium of data and maps used throughout the study.

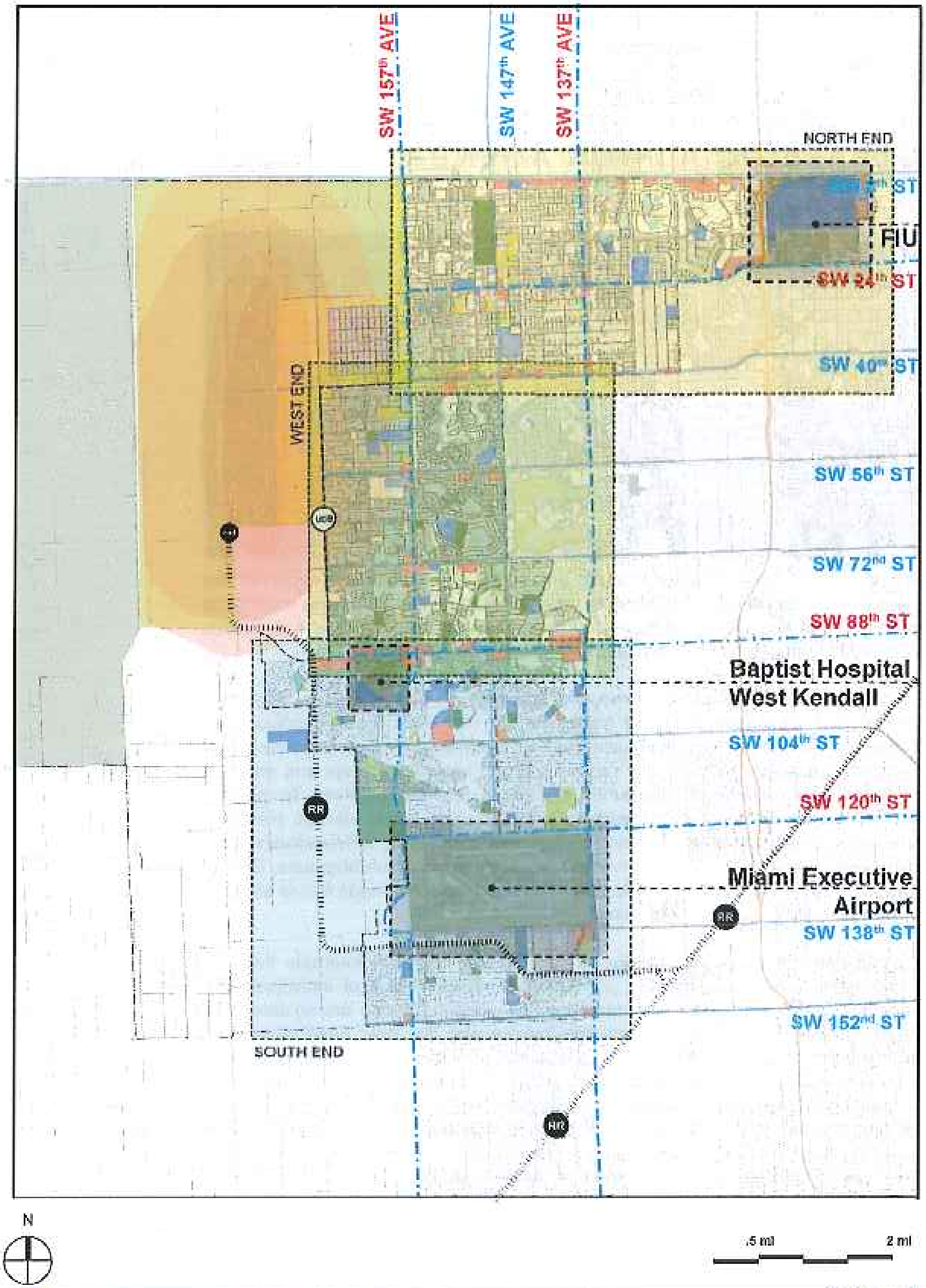
The study team focused on environment and physical characteristics, economic profiles and demographics, and traffic. Rather than see these conditions as isolated phenomenon, we addressed them as dynamic components of the larger community. Issues of community require a broad knowledge base and are best addressed from different backgrounds, disciplines, and perspectives. To this end we gathered a diverse team of experts in architecture, urban design, planning, landscape architecture, traffic engineering, and community administration. We consulted residents, business owners, developers, environmental groups, County officers, and marketing consultants to understand how the various forces shaping this community are currently working.

Communities are defined broadly as people with common interests living in a particular area, an interacting population of various kinds of individuals (as species), or a group linked by common policy.[1] Neighborhoods are smaller units of larger communities used to describe 'people who live near each other.' The connective tissue in any definition of community is the idea of a shared experience in a place. Communities are not built by radical individualism, but when neighbors, community leaders, and engaged citizens discuss, debate and study as a collective intelligence the best strategies for making the places they share better. The following recommendations are offered in this context and with the express goal of contributing to the dialog about community in the West End.

Miami-Dade/District 11, Satellite View 1

[1] "Community." Merriam-Webster.com. Merriam-Webster, n.d. Web. 1 Feb. 2015. <http://www.merriam-webster.com/dictionary/community>.

THE WEST END


SW 157th AVE
SW 147th AVE
SW 137th AVE
NORTH END
FIU
SW 24th ST
SW 40th ST
WEST END
SW 56th ST
SW 72nd ST
SW 88th ST
Baptist Hospital
West Kendall
SW 104th ST
SW 120th ST
RR
Miami Executive
Airport
RR
SW 138th ST
SW 152nd ST
SOUTH END
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STRATEGIC ACTION AGENDA

1. Brand the West End and Its Neighborhoods

Like successful businesses, communities benefit from establishing what the community has to offer the region. Calle-Ocho, South Beach, Brickell, Midtown, the Miracle Mile, Coco Walk, Wynwood, and the Design District, to name a few, are neighborhoods that built a brand identity that, over time, conveys a clear image to the region, living, working, visiting and investing in that community.

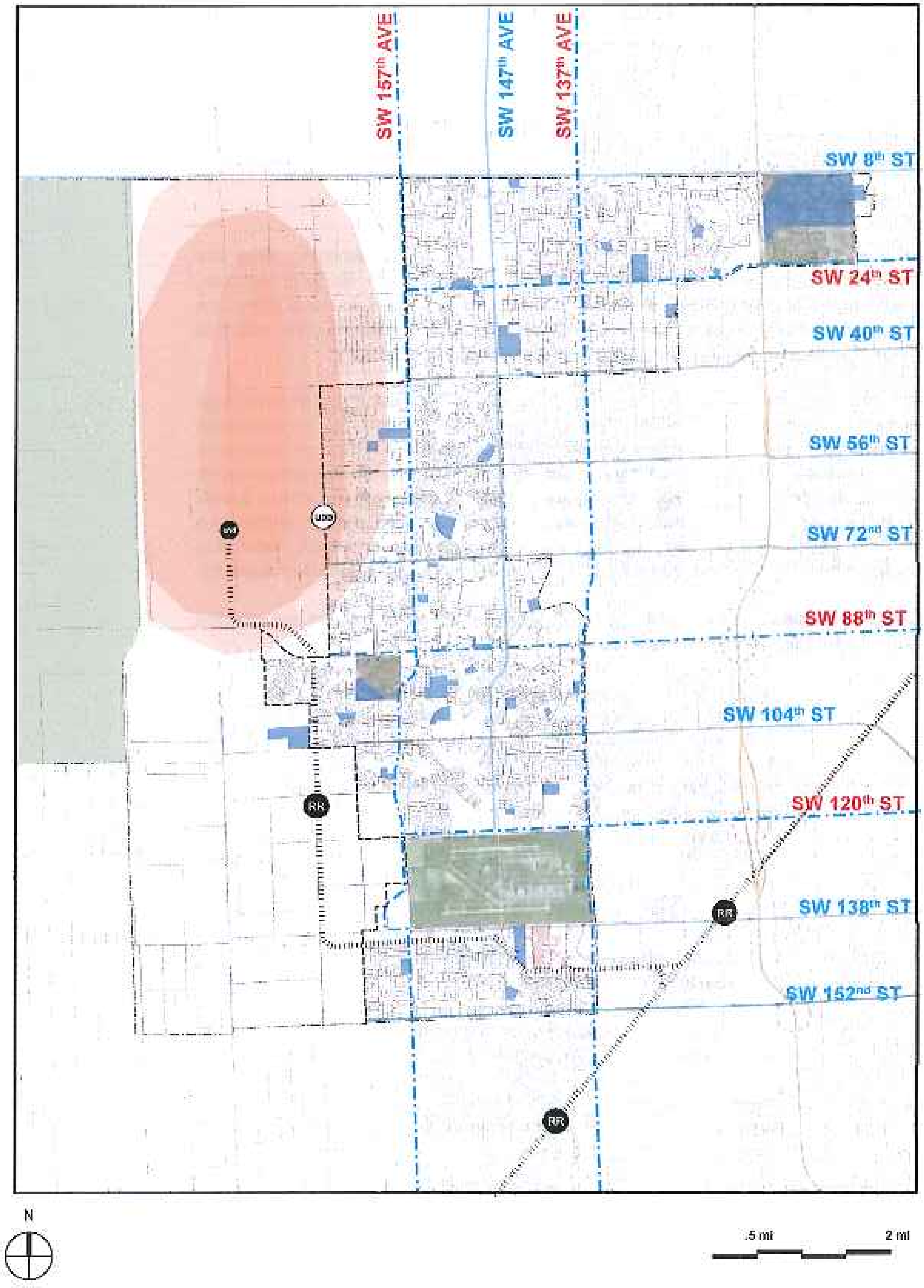
Unfortunately, the identity and the general image of the West End (whether right or wrong) is limited to a monoculture of 'big box' retail stores, service-oriented commercial venues such as gas stations, fast-food restaurants, branch banks and supermarkets. The West End's image and identity in the public eye obscures its assets and potential qualities. **More importantly, a clear and positive brand identity can provide a clear competitive advantage for places within the County as they seek funding and other investment, and can positively support almost all of the other Action Items discussed in this Action Agenda.**

1.1 **Adopt a West End Brand Identity Program.** The elements of a recommended District 11 comprehensive Brand Identity program include:

- Adopting formally recognized ***Brand Names*** for the West End and its neighborhoods. An early leading suggestion is the ***West End with sub-areas of the North, South and Central West End.*** The West End can immediately begin a process of establishing a coherent name, or names for the West End and its neighborhoods. This process is best when community-driven. The current recommendation is to use the "West End" as a general descriptor for the area, but create sub-areas that are smaller and more easily described to residents. Creating sub-areas allows residents to identity within aggregates of neighborhood groups, community services and localized institutions like elementary, middle and high school affiliations, religious and volunteer groups.

- The West End is a popular residence for families, as evidenced by its high median household size (largest in the County's Commission Districts). The West End is also extremely culturally diverse. It's family-friendly lifestyle, housing, amenities and cultural diversity should be celebrated as part of the brand identity program.

OFFICES + INSTITUTIONS

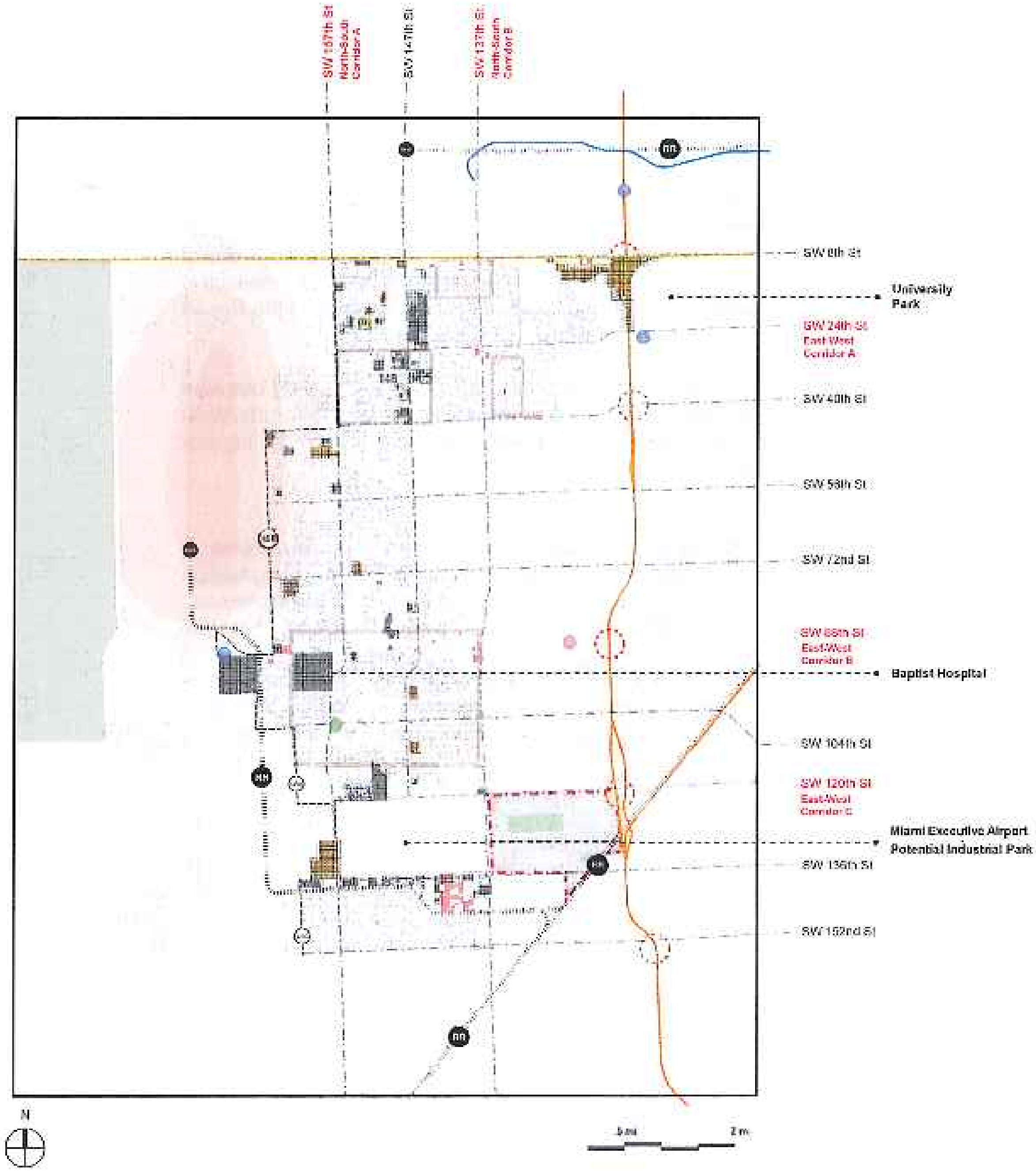


- Streetscape, signage, corridor entrances, and physical improvements considered as part of this Action Agenda should utilize and consistently reinforce the West End's new Brand Identity. The adoption and implementation of distinctive streetscape and landscape elements recommended in the Report reinforce a unique visual identity for the West End.

- Creating greater diversity, mix, and connectedness between land uses also reinforces a new identity and image for the West End and quickly moves its public image away from the big-box suburban enclave.

1.2 **Develop a Distinctive West End Digital Information Program.** Some of the West End's greatest strengths and opportunities derive from its population characteristics, including its high household incomes, high educational attainment, low poverty, low crime rates, and high portion of families with children. A factual information program directed at potential new residents, business owners, and investors, highlighting the West End's hidden strengths is a key component of establishing a new Brand Identity and strengthening the Action Agenda's recommendations. A web site, social media and digital mailing program detailing the West End's hidden value, assets, and opportunities are critical.

OFFICES + VACANT LAND



Home Office Concentration
Office
Home Office
Single-Family
Industrial
Commercial
Public Park

RR Railroad

Urban Development Boundary

One Acre
Vacant Government Owned, Unprotected | 119 Acres
Vacant, Protected, Privately Owned | 75 Acres
Vacant, Protected, Government Owned | 10 Acres
Vacant, Privately Owned, Unprotected | 560 Acres
Total Acreage | ~764 Acres

Turnpike Exit

Florida's Turnpike
SR 836/Dolphin Expressway
SR 41

2. Create Immediate Employment and Work Opportunities in the West End

Expanding employment opportunities within the area may be the single most important issue facing the West End. The mismatch between the West End's high number of resident employees (over 105,000), and low number of jobs within the district means that 78% of the West End's residents leave the West End to work each day. This simple characteristic is a major source of the West End's transportation congestion, long commute times, and congestion on all major routes leading into and out of the area. This situation is highly unsustainable.

Failure to address this issue in the short and long term will negatively affect the West End's quality of life, desirability as a place to live, the housing market and the environmental quality. It also negatively impacts regional transportation efficiency and the region's ability to effectively compete for firms seeking to relocate into the area.

Developing solutions to this problem by providing the already high-skilled, highly employed, local workforce with the opportunity to work closer to home will have significant positive impacts, including an increased tax base, reduced commute times, higher labor productivity, less intensive and more efficient use of the existing road network, improved quality of life, and significant environmental benefits

High vacancies in downtown Miami coupled with oversupply of office space means that developing new, traditional office space in the West End is a difficult proposition for the short and mid term. Solutions will have to look at non-traditional means to provide high-skill, high-wage work opportunities in the West End in the short term. Three simple, low-cost strategies could provide significant work opportunities within the West End, requiring much smaller square footage of development than traditional office development. They are:

- Keeping workers who otherwise work outside the West End in the West End for all or part of the work-week through remote, satellite, and shared office spaces;
- Supporting the ability of employees living in the West End to telecommute on an expanded basis, and;
- Supporting the development and creation of new firms and businesses in high-wage, high skill industries and occupations within the West End.

The basic characteristics of the West End's population, labor force and real estate market clearly support the viability of these strategies, including:

- The sheer size of the West End's employed labor force, their high wages, and proportion of workers in managerial, professional, and service occupations which can work remotely with proper technology and support;

- The high rate of self-employment in the West End, the region's proportion of small businesses and their important role leading employment growth, the region's high rate of entrepreneurial activity and new business formation, and the favorable entrepreneurial demographics of the workforce living in the West End, including their maturity, experience, skill level, wages, and education.
- The growing national trend of employers shrinking office space square footage per worker, increasing use of satellite and shared office arrangements, and growing demand for telecommuting as an important component of employee compensation;
- Reasonable office rents compared to downtown, Brickell and Wynwood, and the availability of underutilized retail properties for re-purposing and redevelopment, and;
- Large numbers of workers and employers in the West End are already in many of the County's ***One Community One Goal*** (OCOG) priority development industries. Many small and new businesses in the OCOG target sectors for the most part can't use or can't afford rents, nor make use of the building types in the downtown core and other built-out and established business districts in the County. Small businesses and start-ups in the OCOG target sectors require affordable, flexible space, and many need rapid access to assembly or distribution facilities in addition to non-traditional office floor space.

Considering these factors all together, the West End may be the one of the best potential areas in the County for incubating new community-beneficial workplace arrangements and new high-wage, high-skill business firms in the OCOG priority industry clusters. In order to improve transportation congestion and further the goal of economic diversification, significant opportunities for businesses in the OCOG target industry sectors who cannot use downtown locations to form, grow and expand must be made in new, alternative business corridors outside its traditional (downtown) business centers.

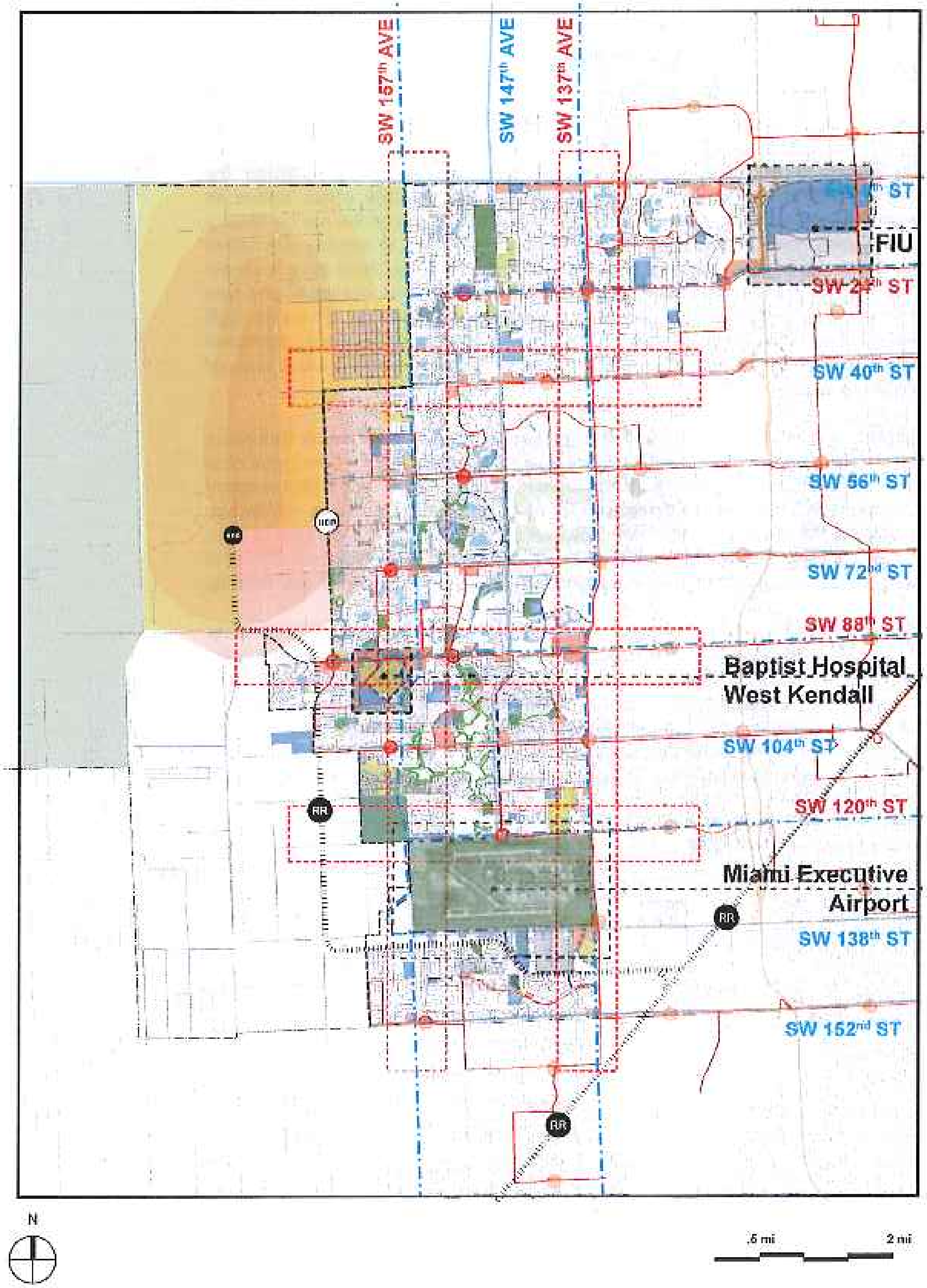
The Action Items listed below are recommended as ways to quickly begin stimulating development interest and demonstrate proof-of-concept for new workplace and non-traditional office space, at low public cost.

2.1 **Initiate a Pilot program to re-purpose underutilized properties for redevelopment as co-working shared office and satellite office space to promote its development and expanded use.** Capitalizing on the market factors cited above, considerable opportunity exists, at little cost, to provide alternative workspace for existing employers and employees inside the West End. A simple Pilot program could provide incentives, marketing assistance, outreach, and sale of an underutilized property to launch a development of this type. Given the high density of workers who could co-work, shared and satellite office space, significant numbers of workers can be kept within the West End in a relatively small amount of office space.

2.2 **Initiate a Pilot Program supporting Development of New Small Business Incubators and Accelerators.** The West End is potentially ripe for development of new small businesses, given the factors listed above. Again, a low-cost pilot program to demonstrate demand and feasibility can be implemented taking advantage of existing accelerator mangers and owners, existing support programs at FIU, and available underutilized retail or other space within the West End. Demand for business accelerators has expanded rapidly in other parts of the County.

2.3 **Aggressively Pursue Development of High-speed Internet and Data Service.** High-speed Internet service is quickly becoming one of the fundamental elements of modern business infrastructure. In many industries ***Bandwidth is as Important as Lanewidth***. It is also one of the most effective incentives to support the development of new businesses, especially small businesses, support the growth and expansion of existing business, and provide employers and employees with greater workplace flexibility. Implementing high-speed Internet service (speeds approaching or at 1 Gigabit per second, about 100 times the National average) also does not have to be a public investment, as private providers including Google are aggressively expanding high-speed service networks across the country. The team specifically recommends immediate application to Google for the West End to become a Beta-tester for Google Fiber. Failing a West End-wide roll out of high-speed service, it can be implemented on a select basis in conjunction with co-work and incubator pilot locations.

MAJOR INSTITUTIONS



3. Leverage Major Assets for New Employment Opportunities

The County, through the One Community, One Goal (OCOG) comprehensive planning process, identified thirty-nine target industries in seven sectors on which to grow and build the region's economy. The industries targeted for development in the OCOG plan are 1) Aviation, 2) Creative Design, 3) Hospitality & Tourism, 4) Information Technology, 5) International Banking & Finance, 6) Life Sciences & Health Care, and 7) Trade & Logistics.

Target industries were selected based on the existing and forecasted above-average growth in each of these sectors worldwide, and the fact that the region has a significant existing economic base in each of these sectors.

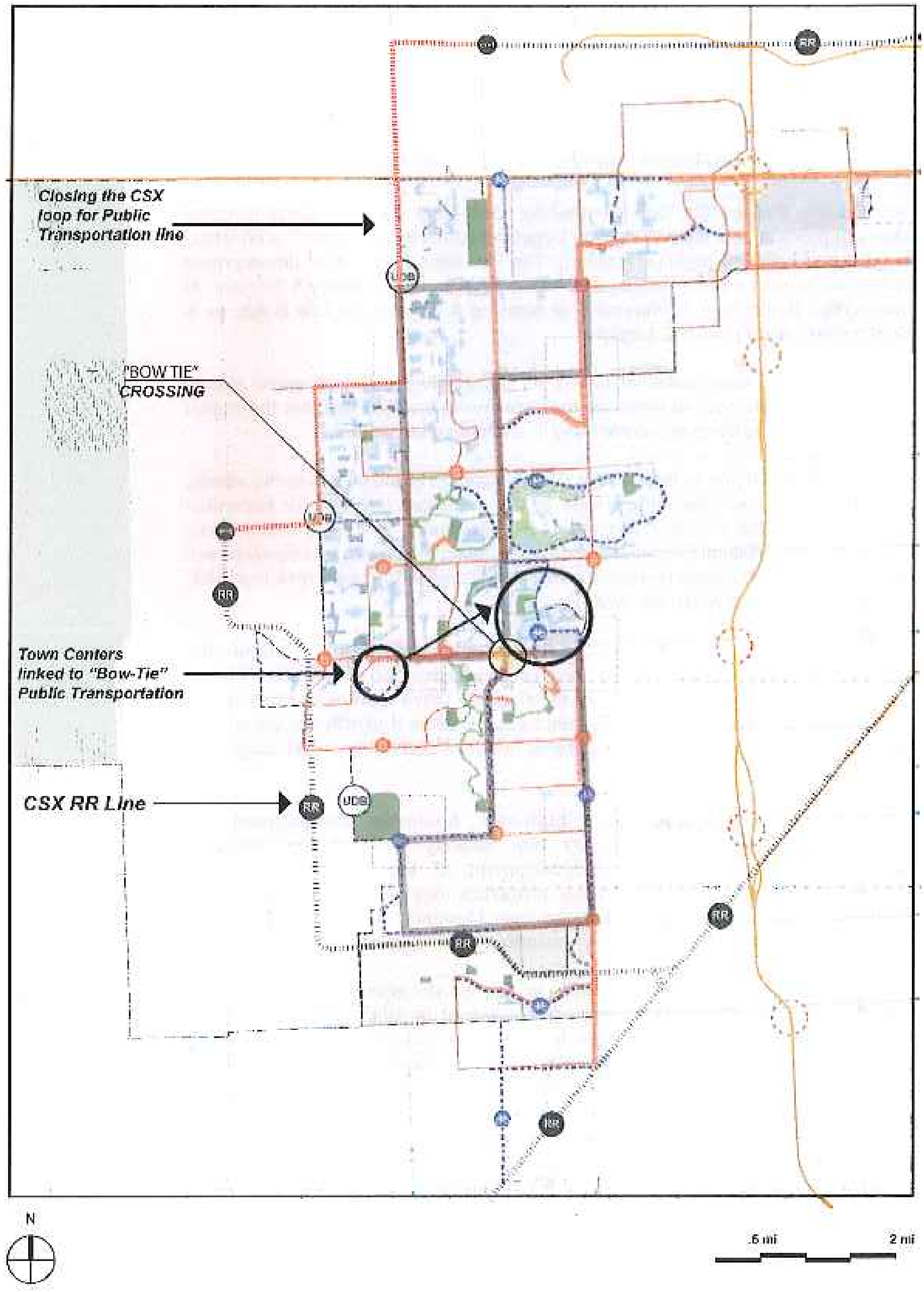
The West End is home to three of the County's most significant economic assets, each of which is leading components of the industries targeted for expanded development in the OCOG. They are 1) Baptist Health, 2) Florida International University, and 3) Miami Executive Airport. Supporting the growth and development of these economic assets represent major opportunities to create new high-skill, high-wage firms jobs within the West End.

3.1 **Support Baptist Health's ongoing service expansion, Healthy Communities effort, and redevelopment of its excess properties for productive, higher density, and employment uses at its Kendall Drive Campus.** Proximity to the Hospital and the existing employment base creates a significant opportunity to expand and grow new health service, medical technology, and diagnostic businesses.

3.2 **Capture employment and high-end business development at FIU.** Florida International University has recently received the rights to negotiate the acquisition and redevelopment of the Miami Fairgrounds, adjacent to its Main Campus. These properties represents one of the best locations in the County to add needed new University facilities, and provide critical new space for advanced business and technology development.

3.3 **Develop an Employment Center in the South West End adjacent to Miami Executive Airport.** The properties adjacent to Miami Executive Airport are relatively underutilized given its location and ground transportation links. The County has targeted Aviation and Aviation Technology as a key growth industry. Given the region's shortage of high-end technology manufacturing and development space, and rare condition of proximity to a small airport in a major population and economic center, the airport represents a singular opportunity to create and diversify the regional employment base. Suitable uses could include avionics, aviation components, electronics, communications manufacturing, testing and development and other high-skill industries requiring close access to airports or aircraft. Partnerships will be required to promote immediate redevelopment planning and eventually provide necessary infrastructure improvements.

INTERMODAL CIRCULATION LOOP



4. Re-Connect the West End Using Alternative Transportation, Place Making and Streetscape Design

The West End and its neighborhoods have proven to be one have the most desirable and in-demand locations to live in the County. However, the West End suffers from three issues that limit its quality of life and development as a whole community. They are:

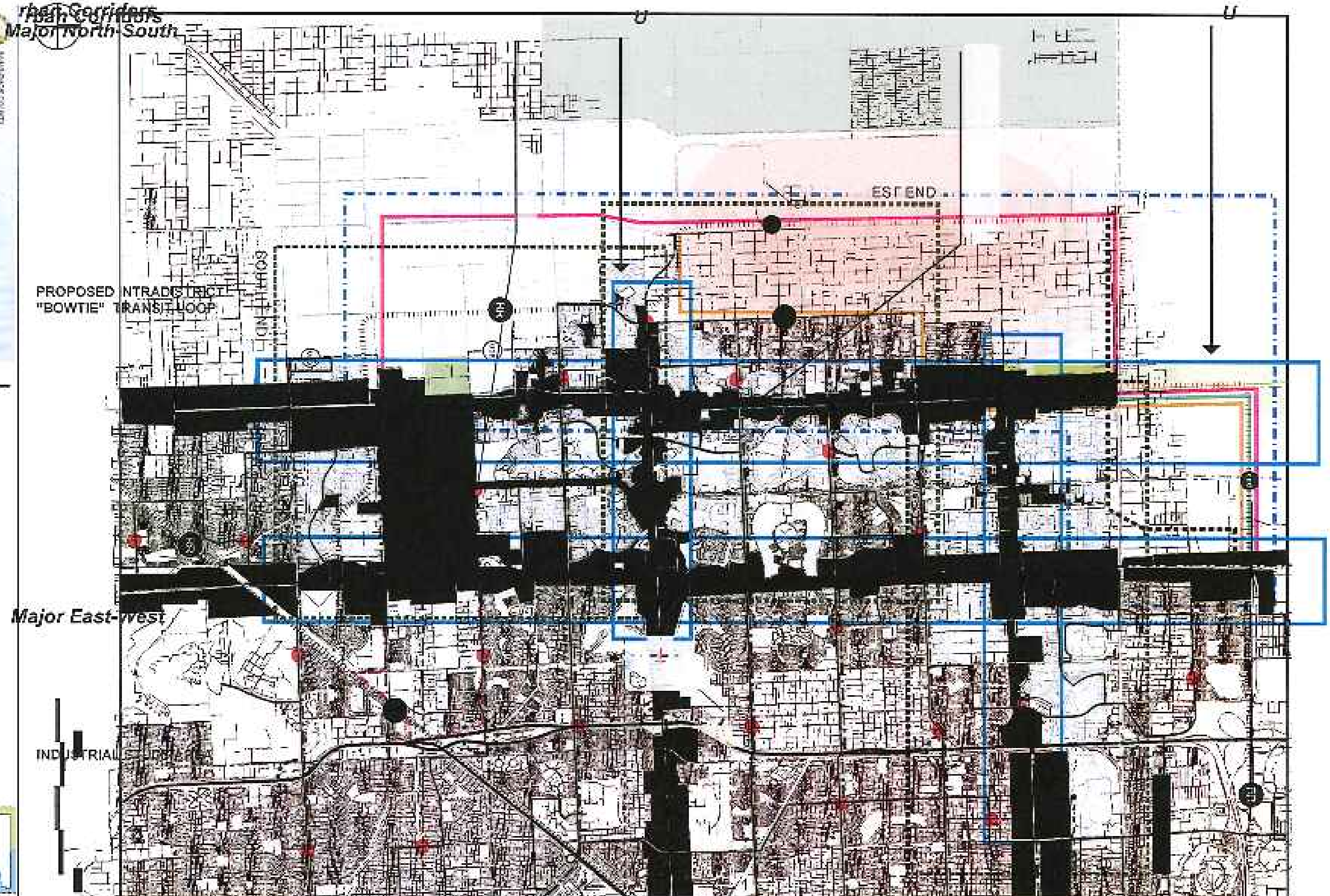
- The West End is rich in parks, green space and physical amenities, but they are disconnected and inaccessible from one another;
- Transportation within the West End, particularly the ability to transfer from one mode to another, is difficult at best. Most mass transit routes were designed to serve commuter traffic, and;
- Much of the West End's main corridor streets are hostile to pedestrian and bike traffic.

High performing, sustainable, communities are re-designing and enhancing their transportation to ease automobile congestion, enhance property values, promote public health, and support long-term residential demand using three principles:

- A renewed focus on walkability and mobility in modes other than the automobile providing expanded mobility choices through safe, secure and continuous routes for pedestrians and cyclists;
- Linking and connecting parks, assets, work and commercial land uses using non-vehicular modes, and
- Adopting "complete streets" and "last-mile" strategies to make all modes of transportation more effective, and increase the ease-of-use for mass transit by re-configuring internal transit routes, place making design, bikeways, pedestrian routes and streetscape improvements to better serve internal transportation circulation (in addition to commuter service), and provide seamless transitions between modes.

The West End has an established, though disjointed, multi-modal transportation system. For the most part, improving non-vehicular modes and mode transfer requires a re-alignment of ***existing*** transit routes, and can be implemented relatively quickly. Longer term, the West End needs to adopt streetscape design standards that embed principles of walkability, access, connectedness and mode transfer, and implement them strategically over time.

MAJOR CORRIDORS



4.1 **Create a trolley loop that connects the three major areas of the West End with a crossover station at the intersection of SW 88th Street and SW 147th Avenue.** Coordinate current public transportation with Urban Corridors and green space access using the proposed intra-district (rubber wheeled) public transportation trolley along the recommended "**Bow-Tie**" route. This simple re-aligned route could link community services and 'greenspaces' in around three key parks and two institutions: Hammocks Community Park, Boystown Pineland County Park, Water Oaks Park, FIU and West Kendall Baptist. It would also connect bike, hiking and walking trails located throughout the West End. Additional entertainment including cafes, restaurants and theaters should be built adjacent to or co-located with these key community parks.

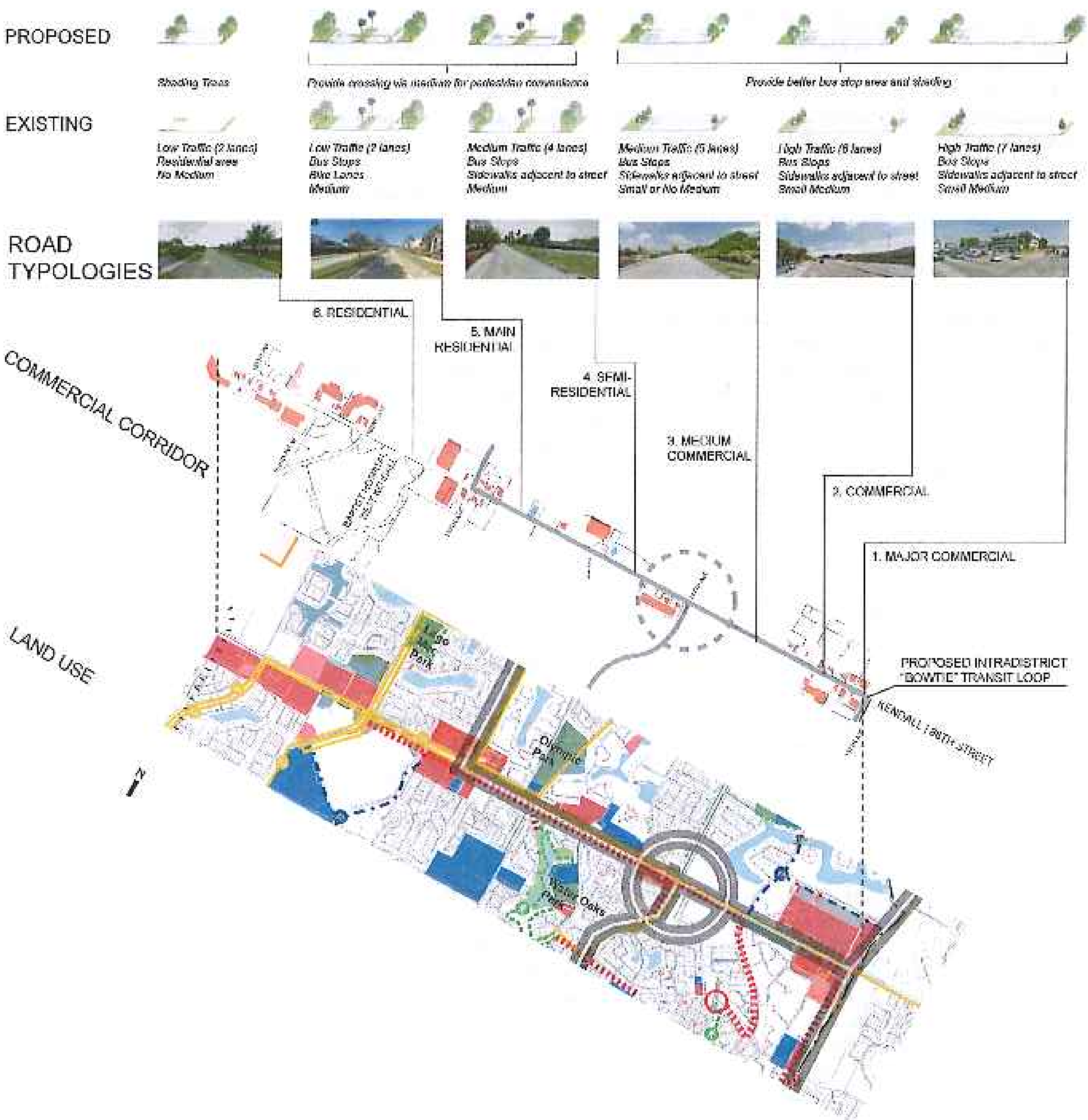
4.2 **Complete and adopt a West End-Wide Streetscape and Complete Streets Design Standards Program.** The West End needs a distinctive streetscape design program that visually and functionally ties key places together, improves way-finding, significantly improves the pedestrian experience on the street, and provides much easier transfer from one transportation mode to another. The Project Team completed a draft streetscape program, including sidewalk performance standards, bus-stop redesign and placement, landscape treatments, signage and way finding, as a draft upon which final standards can be developed and adopted by the County. Those standards are detailed in Appendix C.

4.3 **Strategic and Incremental Corridor Entrance Treatments.** In order to speed the implementation of placemaking and enhanced "complete streets" improvement program, the West End would be advised to make targeted streetscape, pedestrian and multi-modal investments at select locations, providing the highest visibility and to coincide with planned private and public investments. Possible initial locations would include:

- Gateway treatments at the major entrances to the West End;
- Along the West End's central commercial and traffic corridors;
- To coincide with the newly re-aligned "Bow-Tie" trolley loop, and;
- To coincide with future large-scale public and private mixed-use investments or to enhance the pilot business development programs discussed in Section 1, above.

4.4 **Consider a Long-Term Plan to connect the existing CSX Railroad line to create a public transportation loop located along the northern, western and southern edges of the West End.** The West End is not dense enough to support large-scale investments in "heavy" public transit, and the CSX line currently carries freight, but preserving the option into the future could be very valuable as the West End grows and evolves. A CSX public access train station would link to the proposed "Bow-Tie" connector system at three major nodes: SW 88th ST/Krome Avenue, 137th Avenue/ Coral Reef Dr., and SW 8th ST/SW 137th Avenue, and provide direct connections to Miami International Airport (MIA), Downtown Miami and South Miami. This plan has been considered in the past, and represents a potentially valuable transportation option for future east-west and north-south transportation needs. However, financial feasibility depends upon developing new high-density residential and mixed-use nodes connected to the proposed train line.

KENDALL CORRIDOR



5. Transportation Capacity Investments and Policy

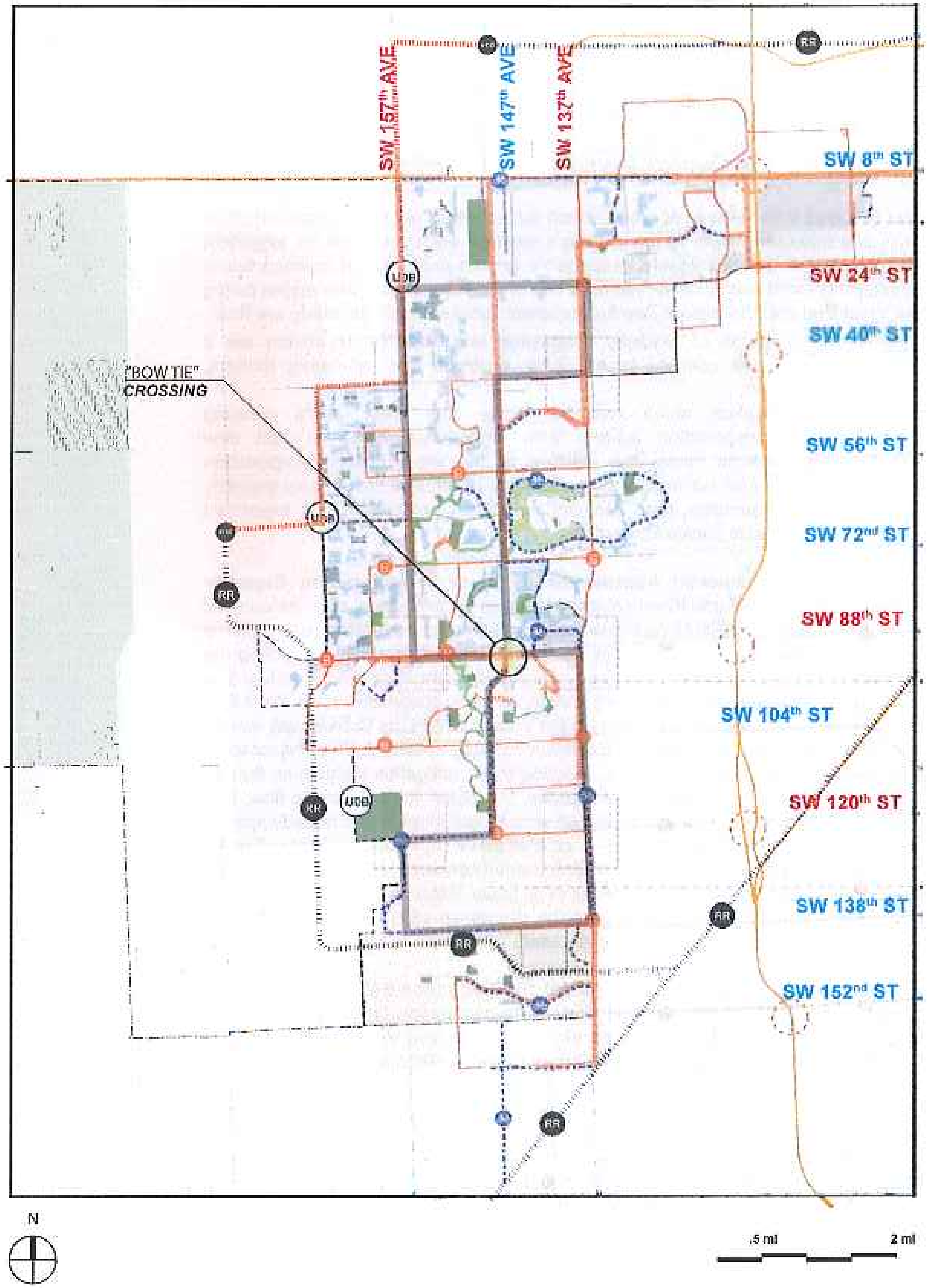
The fact that West End is part of a much larger urban population concentration of nearly 600,000 people at the County's western edge must not be forgotten. Charting a path for sustainable, responsible growth patterns that balance future development with ecological concerns is one of the most difficult challenges facing the West End and the region. Two fundamental conclusions of the study are that:

- Issues of roadway congestion and capacity expansion are a major concern for residents, business and community leaders, and;
- Asphalt alone will not solve the West End's growing transportation issues. With limited land area to add new vehicle lanes, the solution to the West End's transportation issues will involve a combination of efficient, low-impact capacity expansion, land use, and creative employment, and expanded mode choice strategies.

5.1 **Consider Incremental Approaches to Major Transportation Capacity Investments.** SR 836 and Krome Avenue is currently the subject of major corridor studies undertaken by FDOT. As this report has discussed, current land use patterns are driving congestion in both east-west and north-south arterials connecting the West End. However, given the popularity and growth of the West End, it is clear that no single solution will alleviate current and future traffic congestion in the West End — improving transportation conditions in the West End and the Corridor will require a combination of land use and transportation capacity solutions. The Project team recommends that for the short term, adopting traffic mitigation techniques that do not require wholesale addition of new lanes, but better manage traffic flow, is a preferred strategy that 1) promises to deliver congestion relief and added capacity in much shorter time frame, 2) is more cost effective, 3) meets a variety of goals balancing transportation needs and environmental concerns, and 4) will have to be included in a final alternative, regardless of its scale. Wide ranges of efficiency and traffic management alternatives have been discussed within the Krome Avenue study process, and merit further consideration.

5.2 **Consider Development of a Regional Trip Reduction Policy, or Ordinance (TRO).** Regardless of the eventual scale of transportation improvements in the West End, reducing vehicle trips and trip length will have to play a large part in sustainably managing the West End's future growth. TROs are policy adopted to manage congestion by promoting transportation alternatives to single occupancy driving. TROs date back to the 1980's are widely used throughout the US, and can be found in nearly every state. TROs are used to address congestion and parking issues, air quality issues, and lack of transit improvements or funding. TROs involve the application of a range of strategies, including parking pricing, transit subsidies, ride-matching, flextime, compressed work weeks, telecommuting, pedestrian and bicycling facilities, incentive programs and marketing trip alternatives.

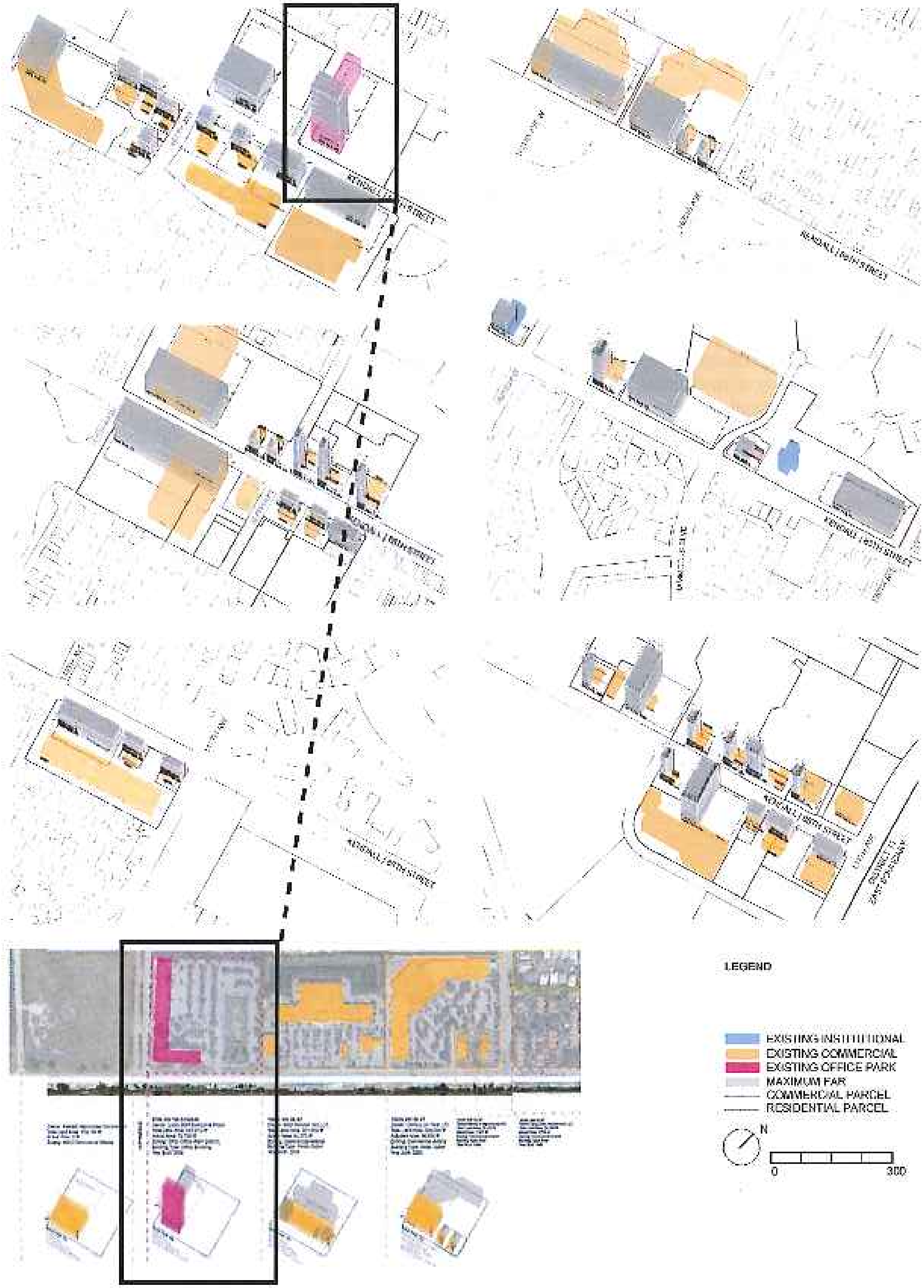
INTRADISTRICT "BOW TIE" TRANSPORTATION LOOP



TRO's can be a mix of requirements and incentives that seek to involve the private sector in transportation demand management. The County has the MOVN (Meeting Our Vehicle Needs) information and assistance program, available to employers looking to provide transportation alternatives to employees. Also, the Miami-Dade Metropolitan Planning Organization (MPO) noted in a recent study of the region's Transportation Concurrency review system that it contained a number of inefficiencies, including "the assertion that the system is too focused on roadways instead of overall mobility (i.e., a mix of transportation systems available to users)." A TRO, integrated with Concurrency review could provide a greater mix of alternatives, flexibility, and drive a re-thinking of how large developments support the West End and regional goal of reducing trips, trip lengths and vehicle-miles traveled, creating more 'walkable', urbane communities. TRO strategies are also in line with changing housing and neighborhood demand characteristics, cited in this report.

TRO policy need not be expensive, restrictive or burdensome. The land use and economic development recommendations of this study incorporate trip reduction thinking, in ways that have multiple community benefits (see Action Items 2, 3 and 4).

KENDALL COMMERCIAL CORRIDOR FAR STUDY



6. Re-Think New and Future Development Patterns

Scarce land availability relative to long-term demand, transportation congestion, low walkability across the West End, and the desires of West End residents demand a re-thinking of immediate and long-term development patterns. The development of low-density single-family housing, low-density retail has been successful in the West End, and may have continuing market demand. This pattern, however, if continued, may exacerbate negative conditions within the West End over the long term.

Given the limited availability of land to significantly expand the road network, changing these land-use patterns may be the single most effective way to 1) reduce traffic congestion and overload of the road network due to work and non-work travel patterns, 2) meet the desire of residents to live in a more pedestrian and bike friendly community, and 3) meet resident desires to use local mass transit as a travel alternative. Initiatives to immediately address these issues include:

6.1 **Consider higher density and re-zoning for mixed-use development at selected locations in the West End.** New development and redevelopment of the central corridors of the West End (SW 88th ST, 137th St., and 157th St.) and new developments of 50 residential units or more should be re-zoned to require and incentivize a mix of high density residential (70+ units per acre), retail, and employment generating uses. In addition, the County zoning ordinances for these locations should include and promote work-live space, and enhanced connections to rapid transit including bus, train and dedicated trolleys. Zoning can be structured as a mix of requirements and incentives to support new forms of more *urbane, walkable, and connected communities*. This re-zoning could be accomplished by expanding the Miami-Dade Comprehensive Development Master Plan (CDMP) recommended Regional and Metropolitan Centers to include **Urban Corridors** that link the North, Central and South West End.

6.2 **Re-Zone and re-plan for New Town Centers.** Residents also expressed a strong desire for new cultural, retail, and entertainment options within the West End, accessible with ease and/or without a car. Two of the West End's largest developable properties — The Palms at Town and Country (at Kendall Drive and the Turnpike), and the Howard Hughes Corporation Kendall Town Center (at Kendall Drive and 162nd Avenue) — have been designated under the CDMP for large urban center development treatment. The County is engaged in a planning process with the owners, and both properties are ideally situated to serve as Town Centers incorporating new residential, retail, employment and entertainment uses for the entire West End. Proper development of these two properties could significantly further many of the development goals of this Report — reducing work related commuter vehicle trips out of the West End, non-work trips, and provide new lifestyle amenities. Their development should be supported and incentivized due to their potential benefits to the Community.


1


2


3

Aerial view of Downtown Doral 1
Townhouses, Downtown Doral 2
Office Space, Downtown Doral 3

DISTRICT PROFILE


1

This section of the Report includes a review of the context of Regional Growth and Seven Key Areas: demographics, land use, housing, transportation, environment, industry and identity.

This profile targets the key vectors that are central in the analysis, strategic planning and management of sustainable maintenance and growth for cities and urban areas. Regional growth encompasses the larger context in which any community must operate. Taking into consideration not only districts immediately adjacent to the West End, but the larger metropolitan region that is described as Miami-Dade County. We looked at comparative cities, spatio-temporal data from multiple sources and government and administrative data provided by local, state and national authorities.

The seven key areas range from qualitative issues linked to lifestyle, perceptions of place and the quality of community life. We also looked at quantitative data that describes the characteristics of the general West End population, their resources, how they use them and where they are located. The assets, strengths, weaknesses and opportunities of the West End were discernable through these various approaches.

Map by Matthew Toro. "Miami World City Distances," from http://miamigeographic.com/ 1

THE REGIONAL GROWTH CONTEXT

The West End's future will play out in the context of a variety of regional and national development trends. The key trends affecting the West End that were considered in development of the Strategic Plan are as follows:

Regional Population Growth

Steady Regional Population Increase

The Miami-Fort Lauderdale-West Palm Beach Metro Area (Palm Beach, Broward, and Miami-Dade County) population reached 5,564,635 in 2010, growing by 11.1% from 2000. Miami-Dade County's population grew to 2,496,435 in 2010, increasing 10.8% from 2000, with an annual average increase of 1.1% per year.

Both the Metro Area and Miami-Dade County experienced a population growth spurt and then slowing of annual growth from 2010 through 2013. If current population growth rates hold, population increase through the remainder of the decade will be comparable, though slightly less than 2000 to 2010. The State of Florida's Bureau of Economic and Business Research has forecast the County's 2020 population to reach 2,761,156, a 10.6% increase, at an annual average increase of 1%. The US Census Bureau estimates Metro Area population grew by 2.2% in 2011, 1.3% in 2012, and 1.1% in 2013, and Miami-Dade County grew 2.5%, 1% and .9% for the same years. Even at the 2013 annual growth rate of .9%, the County will reach over 2.7 Million people by 2020.

Population Growth Driven by High Turnover

The dynamics of Miami-Dade County and the Miami Metro Area's population growth are increasingly driven by international in-migration. For the metro area, migration from international in-migrants is the largest component of population growth since 2004-2005. Between 2000 and 2009, natural population growth (births minus deaths) added over 211,000 people to the Miami Metro Area population. ***However during the same period, the area lost over 287,000 people to net domestic out-migration, but gained over 522,000 residents who migrated into Miami-Dade County from abroad.***

The pattern is similar at the County level — between 2000 and 2009 net population growth from natural growth was 113,201 people, while the County lost 288,571 people to domestic out-migration, but added 353,659 people due to international immigration during the decade. The proportion of international immigrants as a component of total population growth in both the MSA and the County has been increasing each year since 2010.

The area's population dynamic is not only the reverse of the national trend, but is nearly unique in terms of this pattern. People moving into the US from abroad have never been more than 1% of all movers (including intra-county relocations) in each decade since the 1980's. For Miami-Dade County, 12.4% of all movers into the County were from abroad. In addition, only two other major metropolitan areas in the US with overall positive net population growth — New York and Los Angeles — experienced a net loss of domestic population, but had international in-migration that exceeded their net migration losses.

Impacts of this high "churn" rate in the region's population are difficult to determine. Losing a significant segment of the population each year would seem to be unsustainable, but Miami has managed it for over a decade. On the one hand, losing a high number of residents to other cities can mean a loss of talent and income. However, the high rate of replacement driven by domestic and international in-migration can also mean an entirely new addition of talent, ideas, and income. While the bulk of immigrants to the County are from Latin America, the demographics of immigrants (domestic and international) are evenly spread across all age and income segments. From 2005 to 2010, the per capita income of all inbound migrants, outbound migrants, and non-movers in the County were all near $20,100 per person.

Annual Estimates of the Components of Population Change

	Total Population Change	Natural Increase			Migration			International Migration as % of Total Pop. Change
		Net	Births	Deaths	Net	International	Domestic	
July 1, 2001 to July 1, 2009								
Miami-Fort Lauderdale-West Palm Beach, FL Metro Area	538,059	211,429	649,535	438,106	234,674	522,009	(287,135)	97%
Miami-Dade County	246,839	133,201	303,650	170,459	23,115	328,740	(305,624)	133%
Broward County	143,480	66,174	209,107	142,933	75,947	128,311	(52,364)	89%
Palm Beach County	140,760	12,054	136,765	124,714	135,611	64,858	70,053	44%
April 1, 2010 to July 1, 2013								
Miami-Fort Lauderdale-West Palm Beach, FL Metro Area	263,634	63,683	216,183	152,500	196,312	163,622	32,690	62%
Miami-Dade County	120,719	40,263	101,550	61,287	78,178	99,040	(21,670)	83%
Broward County	90,776	21,691	69,339	47,848	68,608	42,215	26,393	47%
Palm Beach County	52,037	1,729	45,294	43,565	49,520	21,558	27,967	41%
July 1, 2012 to July 1, 2013								
Miami-Fort Lauderdale-West Palm Beach, FL Metro Area	64,809	18,411	56,902	40,491	42,484	52,706	(10,222)	81%
Miami-Dade County	24,409	11,405	31,209	19,803	11,040	32,104	(21,064)	131%
Broward County	24,031	6,668	21,556	14,892	16,582	13,633	2,949	57%
Palm Beach County	16,412	339	14,135	13,796	14,062	6,959	7,093	42%

Regional Employment Growth Trends

Highly Cyclical Employment Gains

Miami has grown to become a nationally competitive financial services, international trade, and real estate development center, and continues to grow as a gateway for goods, services, investment, and general business talent from Latin America and the world. The County's employed labor force grew 18% from 2000 to November 2014, adding a net 184,688 jobs. However, Miami's employment growth since 2000 has been hampered by the successive national economic downturns of 2001-2003 and 2007-2010.

The County's jobs base suffered successive losses of 1.2 and 1.3 percent in 2002 and 2003, regained jobs at an average annual rate of 1.2 percent 2004 to 2007, only to shed jobs again from 2007 through 2010. From the peak number of total jobs in Miami-Dade in December 2007, the County lost 98,958 or 9.6% of all jobs, through August 2009. ***The dual downturns affected Miami more than the rest of the US — the national economy ended the 2000-2009 decade with a net zero jobs base increase, while Miami's jobs base experienced a net loss of over 42,000 jobs over the same period.***

Since September 2009 the County economy rebounded, adding back 146,754 jobs (not seasonally adjusted), through November 2014. The total size of the County jobs base, however, took six years to recover to its peak (2007) size. The employed labor force as of November 2014 reached 1,231,588, a 4.4% increase from 2013 and a 6.2% unemployment rate.

Below Average Wages and Incomes, Slowing Wage Growth

Wages in Miami-Dade have historically been lower than national wages across most of the economy. As of May 2013, workers in Miami-Dade had an average (mean) hourly wage of $20.72, 7% below the nationwide average. Wages in the County were significantly lower than their respective national averages in 13 of 22 major occupational groups. Salaries in almost every sector except Trade, Transportation, Health services and Leisure and Hospitality are lower than the national averages.

According to 2012 data released by the State Bureau of Economic Analysis (BEA), although Miami is Florida's largest County economy, its per capita income is 33rd and its median household income of $43,000 is 16% below the US median, and 36th among all Florida Counties.

Average annual wages in the County have grown each year since 2004, reaching $47,458 per worker. However, average annual wage growth has slowed significantly, from 4.5% growth in 2004 to 1% in 2013. With the slowing wage growth, the gap between Miami-Dade's average wages and US average wages has grown during the same period from 1.3% to 4.7% below US average annual pay.

Evidence indicates a shedding of higher wage jobs during the last recession. Despite improving employment numbers, the County Regulatory & Economic Resources Department noted that nearly 30% of the jobs lost in the recession paid annual wages of $50,000 or higher, and were in high-wage industries including professional and technical services, finance and insurance, information, transportation and wholesale trade. Sixty percent (60%) of the new jobs created post-recession averaged annual salaries of $35,000 per year, and only 24% of the jobs added, pay more than $50,00 per year.

Concentrated Industry Employment

Employment in Miami-Dade historically concentrates in a limited set of industries. As of June 2014, the County's five largest super-sectors by employment are Trade, Transportation, and Utilities (26% of total non-farm employment), Education and Health Services (15.6%), Professional and Business Services (14%), Leisure and Hospitality (12.5%), and Government (12%). The percentage of the labor force employed in each of these sectors is significantly above their national averages, in particular Trade and Transportation.

Most recent BLS data indicate that the County continues to be concentrated, compared to other metro areas, by occupation as well. When compared to nationwide averages, County employment was most highly concentrated in 9 of 22 major occupational groups including office and administrative support, sales and related areas, and protective services. Conversely, the remaining 11 major occupational groups had employment shares significantly below their national representation, including production, management, education, training, and library science.

Employment Growth Forecasts and Structural Change

The housing market, tourism spending, and trade led the County's recovery from the 2007-2008 recessions. Tourism to Miami reached a record 14.2 Million visitors in 2014. Tourists spent an estimated $22.8 Billion. International trade has continued to show growth — the value of total trade moving through the County's airports and seaport has grown each year since 2011. The dredging of the Port of Miami, scheduled for completion in 2014, combined with the widening of the Panama Canal, will dramatically increase shipping capacity and traffic through the Port, and is expected to create 33,000 jobs in the region in a range of occupations and industries, including warehousing, transport, and trade finance.

The State of Florida projects over 110,000 new jobs created in the County from 2014 through 2022. The top ten largest growing industries, according to the Department of Economic Opportunity (DEO), will create over 70,000 of those new jobs:

- Ambulatory Health Care Services
- Professional, Scientific, and Technical Services
- Local Government
- Administrative and Support Services
- Educational Services
- Food Services and Drinking Places
- Specialty Trade Contractors
- Nursing and Residential Care Facilities
- Clothing and Clothing Accessories Stores
- Social Assistance

The ten occupations producing the largest number of total jobs in Miami-Dade, will create 24% of those new jobs are in mostly low skilled occupations. They include:

- Retail Salespersons
- Registered Nurses
- Customer Service Representatives
- Office Clerks, General
- Nursing Assistants
- Receptionists and Information Clerks
- Sales Representatives, Wholesale and Manufacturing, Other
- Cashiers
- Food Preparation & Serving Workers, Including Fast Food
- Laborers and Freight, Stock, and Material Movers, Hand Movers

According to the same DEO forecast, the largest job creating occupations requiring a Bachelor's degree or higher include:

- Accountants and Auditors
- Teachers and Instructors, All Other
- Elementary School Teachers, Except Special Education
- Management Analysts
- Secondary School Teachers, Exc. Special and Voc. Ed.
- Market Research Analysts and Marketing Specialists

The largest job creating occupations requiring a Master's degree or higher include:

- Lawyers
- Pharmacists
- Physicians and Surgeons, All Other
- Family and General Practitioners
- Dentists, General
- Educational, Vocational, and School Counselors
- Instructional Coordinators

For the Beacon Council's ***One County, One Goal Plan***, Avalanche Consulting examined the relative size and growth of 30 industry clusters — groups of related industries. According to a forecast by Avalanche and EMSI, the top 18 fastest growing clusters will add over 107,000 new jobs in Miami-Dade through 2020. Those clusters, and their rates of projected job growth in Miami-Dade from 2010 to 2020 are:

- Research (64.5%)
- Software / IT (26.0%)
- Agribusiness & Food (14.2%)
- Automotive (22.6%)
- Back Office (22.3%)
- Building & Construction (17.2%)
- Energy (15.3%)
- Healthcare (14.2%)
- Non-Profits (13.5%)
- Private Education (13.4%)
- Culture & Entertainment (11.3%)
- Financial & Real Estate (10.4%)
- Professional Services (10.2%)
- Electronics (10.0%)

Regional Reliance on Small Business Employment

The County economy is especially reliant on its small businesses. According to the latest County Business Patterns Data (2012), 91% of all non-agricultural business establishments with employees in Miami-Dade employ less than 20 people, compared to 86% across the US economy. Establishments employing less than 50 persons represent 96% of all establishments in the County, and if non-employer (single proprietor) establishments are included, they represent 99% of all business establishments in the County.

A second measure of the County's particular reliance on small businesses is its high rate of self-employment. Self-employed persons represent 9.4% of the non-agricultural employed labor force across the US. Miami-Dade's percentage of self-employed persons is 13.9% of all employees. In addition, self-employment in the US grew 11% since 2000. Over the same period, self-employment increased over 50% in the County, though declining slowly since 2007.

A third indicator of the County's reliance on small employers is the growth of workers who work full-time from home. According to the County's Department of Regulatory and Economic Resources persons working full-time from home grew from 2.5% to 4.5% of the County's employed workforce from 2000 to 2014, surpassing the national average, with a steep rate of increase since 2010, opposite the declining national trend. The highest percentage of full-time at-home workers in the County is in the Professional, Scientific, Management and Administration industries, and in the Management, Business, Science and Arts occupations.

Small firms are also the most important component of new job creation. As of 2014, firms employing less than 20, and firms employing less than 50 have created 52.8% and 61.8% of all new jobs created in the US since 1992. On an annual basis, firms employing less than 50 create almost 43% of all new US jobs, a constant rate sine 1992.

Lastly, small firms led the County's economic recovery from the last recession. From 2007 to 2012, establishments employing more than 50 workers in the County lost 48 net establishments. During the same period, establishments employing less than 50, including self-employed (non-employer establishments) increased by over 47,000 new establishments.

High New Firm Creation Rate

The Kauffman Index of Entrepreneurial Activity tracks detailed data regarding the formation of new business firms annually using over 500,000 samples taken from the BLS Current Population Survey. The Kauffman Index is one of the most robust analyses of its kind, and has tracked five important trends:

- The national entrepreneurship rate — the number of adults creating new businesses per month — has averaged around .3% per month (or 300 entrepreneurs per 100,000 persons) since 1996;
- 78% of entrepreneurs creating new companies are over 35 years old;
- Immigrants create new business at rate 1.5 times the native US population;
- Latinos create new businesses at rate almost 1.5 time Whites and Asians, and;
- The Miami Metropolitan Area has since 2004, had a high-ranking new business creation rate. In 2012 the Miami Metro had the highest entrepreneurial Index of the nation's 15 largest Metro Areas, and in 2013 only San Francisco and Los Angeles rated higher. Miami's Entrepreneurial Index, at .56% in 2012 and .43% (430 new businesses created per 100,000 per month), in 2013 is almost 1.5 times the national average.

Regional Structural Economic Development Objectives

Miami-Dade County's political and business leadership have made diversification of the region's economy a top goal. Crystalized in the ***One Community, One Goal Strategic Plan***, the County and the Beacon Council completed an extensive analysis of the regional economy, focusing on its structure, competitive strengths, and weaknesses. The OCOG's most important conclusions are:

- The County economy is reliant on a small set of industry sectors that are sensitive to cyclical changes in the national and global economy;
- Miami is a "transactional" economy — it captures little value added of the significant volume of goods and capital moving through it, and;
- Miami is below the US Average in educational attainment, particularly advanced university degrees.

In addition, Miami's economy is characterized by low productivity – it is in the bottom 25% of the largest 100 metro economies in terms of Gross Metropolitan Product (GMP) per capita, and has below average per capita personal income among ***all*** metro economies.

The core goals of the OCOG Strategic plan are to:

- Diversify the Miami-Dade economy, supporting the growth of industry clusters and job growth that transforms, over time, Miami's economy into a ***high performing, high-value added*** economy;
- Develop an economy that's less dependent on population increases and in-migration and more resilient and resistant to sharp economic cycles;
- Leverage local economic strengths and geographic position to support the creation and expansion of firms in nationally growing sectors, higher rates of innovative output in the form of Advanced products, services, technology platforms and business processes, and greater innovation capacity, technology adoption and market flexibility;
- Create more high-income employment, and raise per capita GMP and income, and;
- Develop an Economy with greater Horizontal mobility – knowledge and skills that apply across different industries and occupations.

The OCOG plan focuses on growing and strengthening business and job creation in thirty-nine target industry clusters across seven broad business sectors which 1) have higher than average proportion of local employment, compared to other cities, 2) are part of rapidly growing national economic sectors, 3) have higher than average projected rates of growth, 4) have a regional competitive advantage compared to other regions, and 5) create high wage and value-added jobs. The OCOG target business clusters are shown below.

AVIATION
Aircraft Parts & MRO
Assembly & Manufacturing
Composite Shops
Flight Simulation & Training

CREATIVE DESIGN
Advertising & Marketing
Architecture & Engineering
Fashion & Lifestyle
Film, TV Production & Digital Content
Industrial Design

LIFE SCIENCES & HEALTH CARE
Agricultural Sciences
Back Office Support & IT
Biologics
Computational Science & Health IT
Medical Devices
Medical Tourism
Pharmaceuticals

TRADE & LOGISTICS
Distribution Centers
Logistics IT
Maritime Services & Trade Finance
Perishables Value-Added Services - Assembly & Kitting

HOSPITALITY & TOURISM
Conventions, Conferences & Trade Fairs
Cruise Tourism
Cultural Arts
High Income International Tourists
Medical Tourism
Tourism IT

INFORMATION TECHNOLOGY
Back Office Support & IT
Computational Science & Health IT
Data Centers
Digital Media
Logistics IT
Mobile Applications
Simulation Technology
Tourism IT

INTERNATIONAL BANKING & FINANCE
International Banks
International Insurance & Wealth Management
Maritime Services & Trade Finance
Mobile Applications
Technical Customer Support & Back Office

Real Estate Market Performance Trends

The County's real estate markets rebounded since 2009, returning to varying levels of expansion and increasing value. Key regional and national real estate market trends that will have the most impact on the redevelopment of the CRA are as follows:

County-Wide Land Availability

Across all sectors, the availability of land will drive price and location of new development. Miami-Dade County is largely built-out. The County has 11,012 acres inside the Urban Development Boundary, and only 2,083 acres inside the County's Urban Infill Area are privately owned vacant land. Of the vacant acreage remaining in the County, parcels larger than 4-5 acres are at a premium.

The growing shortage of large undeveloped parcels is resulting in real estate development sectors shifting to "infill urban" strategies with higher densities and smaller building footprints. Countywide, the development community is assessing and executing infill development strategies on smaller vacant properties, and those with underutilized or undervalued buildings. In particular, Miami-Dade County, as well as leaders in regional market intelligence, noted that the County has a particular shortage of readily available land suitable for manufacturing, assembly, R&D, back office, and distribution uses.

Regional Residential Market

Since the trough of the 2008 recession Miami-Dade experienced a strong real estate recovery — residential real estate experienced record sales volume each of the last three years (2012, 2013, 2014) and rising median prices. The Department of Housing and Urban Development (HUD) projects that from 2012 to 2015 the County will have demand for 22,600 homes, including 13,050 homes already under construction in 2012. According to the latest report from the Miami Association of Realtors, key regional residential real estate indicators include:

- Sales of single-family homes decreased 1% compared to a year ago, and condo sales were down 15.5% resulting in a 9.2% decrease in combined sales.
- Single-family and condominium home prices experienced 41 months of increase over the 42 months preceding November 2014. The median sale price for single-family homes in November 2014 increased to $245,000, condominiums to $189,777, both representing a 5.4% increase from the previous year. Through 2014, demand has been strongest for single-family homes priced between $200,000 and $400,000.

- The median number of days on the market for single-family homes and condominiums dropped significantly from 2008, but has increased to 47 and 57 days respectively, from November 2013 to November 2014.

- Cash sales of all properties reached a high of over 60% in 4Q 2013, but have declined to 53.3% through the end of 2014. By 4Q 2014, 41.7% of single-family homes and 63.8% of condominium closings are cash sales. The high portion of cash sales indicates strong continuing foreign interest in single family and condominium properties.

- Distressed property transactions continue to decline since the recession. By November 2014 34.7% of all closed residential sales in Miami-Dade County were distressed, including REOs (bank-owned properties) and short sales, compared to 35.1% one year earlier.

- At the current (4Q 2014) sales rate, there is a 5.7 month supply of single family homes, and an 8.4 month supply of condominiums, representing a relatively balanced market between buyers and sellers.

- Demand for multifamily rental units has increased significantly since 2008. Vacancy rates have hovered between 3 and 4% across the County from 2011 though 2014. 2,900 units were delivered in 2014, and 4,800 new rental units have been applied for 2015 in the County.

- Average County rent continues to increase — the average apartment rent increased another 3% in 2014, and has been projected to increase again by over 4% to $1,297 per month.

- The average capitalization rate for multifamily rental investment properties in Miami-Dade is in the mid-to high-5 percent range, representing strong investor confidence and demand.

Other key trends underlying housing market indicators that will most impact the region and the West End include:

- Both homeownership and rental in Miami-Dade is becoming more unaffordable. The percentage of income spent on housing is increasing each year, wages are not keeping pace with either inflation or housing price increases, and a significant portion of new job creation in the County has been in occupations with wages below levels needed to afford increasing market rents.

- The regional supply of affordable housing is constrained by the high profitability and demand for luxury housing, and the difficulty of obtaining tax credit housing finance in Florida.

- In Miami-Dade, the percentage of the population living in rental housing increased from 38.2% to 40.6% from 2000 to 2010, and accelerated sharply from 2010 to 2013 to 44%. As of the last census estimate in 2013, the County's population living in rental housing increased by 116,872 from 2010. Total population increased by only 73,000 people during the same period, meaning a significant portion of owners living in the County moved into rental housing.

- Extensive national research, including surveys by the MacArthur Foundation and National Association of Home Builders (NAHB) documented shifts in housing preference at both ends of the demographic spectrum – millennials and 55+ households. Leading preferences shaping housing demand among these two demographics include
  - Increased demand rental housing, moving out of home ownership, smaller size housing,

  - Locations requiring less drive time to work, to shopping and conveniences, recreation and entertainment, and are increasingly seeking neighborhoods in which daily activities are closer and nearby. Millennials are the first generation since the invention of the automobile to drive less miles than their parents, and this trend is accelerating;

  - Preference for housing in proximity (less than ½ mile) to mass transit, and access to a mix of alternative transportation modes, including bicycles and walking, and;

  - More outdoor amenities, including garden plots, walking/

jogging trails, parks, outdoor pools, and local drug/ convenience stores.

According to the NAHB, the growth of 55+ housing, both rental and owner-occupied, is expected to provide strong growth in housing sales and construction. However, these shifts in preference cuts across age and income: nearly half (45%) of current homeowners say that they would consider renting at some point in the future, including homeowners with postgraduate education (53%), homeowners with annual household incomes greater than $75,000 (51%), and 50 to 64-year-old homeowners (49%).

The Regional Office Market

The office sector was the hardest hit commercial real estate sector in the last recession, and the slowest to recover. While improving over the last three years, the office market still faces numerous challenges.

At the close of Q4 2014, Countywide vacancy rates are close at 14.9%, down from a high of nearly 19% in 2010. However, vacancies across the region's office sub-markets vary widely from a low of 4.7% in Coral Way, to 20% Downtown and 37.7% vacancy rate in the Biscayne Corridor.

Average asking rent across all office classes in the County grew to $30.79 per square foot by the close of 2014, but is still under the region's high of $36.30 in 2008. Total net absorption climbed to a total of 853,272 square feet of space leased in 2014 after the market reached bottom in 2009 with over 875,000 square feet of negative absorption. Annual absorption rates are still below that of 2005.

New office construction dropped dramatically, shrinking from over 2 Million square feet delivered in 2010, to just over 260,000 square feet for all of 2014. However, average capitalization rates for office property purchases closed in 2014 over 6 percent, indicating investor interest in existing leased properties.

Of the County's 46.9 Million square feet of private market office space, 13.6 Million are in the CBD (Brickell Avenue and Downtown), and 33.3 Million square feet in the rest of County. The County's office market has alternated between new space developed in the CBD and suburbs.

Six significant trends are continuing to shape office demand across the County and District 11. They are:

- Miami's office market was overbuilt relative to the number of office workers in the regional economy, and construction of new office space continued unabated through 2010, two years after the recession took hold. The subsequent employment crash left a large oversupply of office space throughout the County, which lingers today. However, even as total employment in the County increases, the number of office workers as a percentage of the total employment base is growing slower than it was prior to the recession. Although the region has had large growth in legal employment, more jobs are being created in occupations that do not require office space.

- Average asking rents should improve, but mostly because new development is not expanding office space supply (only a .3% growth in inventory in 2014).

- After the recession, U.S. companies are rethinking their use of office space, and restructuring, consolidating and re-engineering their business practices, and finding ways to shrink and share office space, including outsourcing non-core functions, such as IT, accounting, human resources, marketing and legal to lower cost providers.

- Across the US, employers are aggressively shrinking the amount of square footage per employee. According to the CoreNet Global Corporate Real Estate 2020 survey, square feet per employee in the office sector shrank from 225 square feet in 2010 to 176 in 2012, and is projected to reach 151 or less in 2017.

- Corporations are placing talent closer to their customers and away from the central office. Aided by technologies such as Skype and GoToMeeting, ***telecommuting is not only a way to save on office space, but is ranked by 46% of corporate leaders in a recent Deloitte survey as second only to compensation as the best way to attract talent.*** From 1997 to 2010, there was a 35% increase in the number of people working from home (13.4 million people now work at least one day per week from home).

- Leading corporations are using more informal office space, moving satellite offices into neighborhoods, and using shared office space in main offices. PricewaterhouseCoopers has a desk reservation system. CBRE is moving to an unassigned workplace environment called CBRE Workplace 360.

Even as the County economy improves and adds jobs, the combination of existing oversupply and changing business practice means that economic expansion will take place with much less new office space development than has been historically required in the past.

The Regional Retail Market

Retail development in the County recovered quickly post-recession, and has been a leading development sector since 2008. Average vacancy rates across the County continued their decline, reaching 3.7% in 2014. Aventura, Miami Airport, Coral Way and Medley-Hialeah had lowest vacancy rates in the County (below 3%). Highest vacancies are in the Miami-City, Brickell and Downtown Miami submarkets (over 6%).

Through Q3 2014, average retail rents in the County rose 4 percent from the previous year to $28.58 per square foot. Asking rents have risen 15.9 percent since bottoming out during the recession. Northeast Dade, South Dade and Hialeah Gardens had the most affordable average asking rents in the county, at below $20.00 per square foot. Miami Beach and Brickell areas had the highest rents at $62.16 and $61.03 per square foot. Asking rents at shopping centers also increased to $27.64 per square foot in the past year. Rents for net-leased space increased 4.3 percent to $29.21 per square foot.

Retail construction has rapidly increased in 2014, with 1.4 Million square feet of new retail expected completed during 2014. Deliveries in 2011, 2012 and 2013 were less than 500,000 square feet for the entire County each year. There is approximately 1.9 million square feet scheduled for completion through 2015.

As a category, the strongest growth in rents, sale prices and cap rate performance was in high-end and luxury brand retail. Value brand retail moved more slowly, trailing middle-income employment and wage recovery.

The future of retail in the County and the West End will be dramatically affected by the rapid growth of E-Commerce. According to Deutsche Bank's RREEF Global Real Estate Research Group, although e-commerce accounts for a relatively small share of total retail sales, it is capturing a significant share of sales in commodity items. E-commerce sales are pervasive and have grown 40% since 2007, in sharp contrast to less than 5% overall sales growth. Excluding auto-related purchases (which don't sell on-line) e-commerce grew 53.0% from 2007 to 2012, seven times the overall retail sales growth rate.

According to Deutsche Bank, the growing shift to online shopping has significant real estate implications. The amount of e-commerce retail sales in 2012 ($157 B) would equal between 350 million and 500 million square feet of leased retail space based on sales volumes, about a third of the vacant retail space in US shopping centers and retail districts. Deutsche Bank's research hasc(change from AHS in document) also noted that E-Commerce is diverting a growing percentage of shoppers and the industry away from bricks-and-mortar sales locations and development. The effects on the retail market include:

- Fewer and smaller Stores: chains are rapidly closing significant portions of their physical store locations, including Abercrombie & Fitch, the Gap, Best Buy, and Radio Shack. Commodity retailers, especially big-boxes, are closing stores, and shrinking new ones, in some cases from 100,000 square feet to 50,000 and 40,00 square feet stores.

- Using an "Urban" Strategy — moving stores closer to urban consumers, with smaller footprints. Wal-Mart Target, Office Depot OfficeMax and Staples are all developing stores ranging from 23,000 to 15,000 square feet.

- Multi-Brand Stores, bringing multiple brands under one roof. The Gap and Toys R Us are placing multiple brand flags in the same store. Other retailers are co-locating within another retailer's store.

The Miami Market is seeing each of these trends play out, with chain retailers developing stores in highly urban locations, on smaller footprints, and in interesting vertical mixed-use configurations.

Industrial and Flex Space Market

Industrial properties in the County have enjoyed a resurgence of demand since 2012. Through the end of 2014, the average vacancy rate continues to trend downward, ending the year near 5.9%.

According to Marcus & Milchap, the County's average industrial rents have increased to between $7.68 and $8.17 per square foot. 1.8 Million square feet of new industrial space was added in 2013. Construction for 2014 is expected to equal that number, consisting of properties of 100,000 square feet or more. New Industrial construction is expected to increase again in 2015.

Marcus-Milchap ranked the Miami market as the fourth best performer of all large city industrial markets based on growing sales volume, rents, and strong demand (absorption) for all of 2013.

As the major trade gateway to South America, rapidly expanding South American trade volume and increasing intermodal shipping activity have driven growth in the industrial sector. The widening of the Panama Canal and dredging of the Port of Miami will increase the demand for warehouse, shipping facilities and back office space, but not necessarily at the Port, where land is at a premium.

Access to Commercial Capital & Credit

Access to equity and debt financing was one of the worst casualties of the recession, hurting all segments of the economy. In South Florida, easy access to credit fueled the real estate run-up and business expansion from 2000 to 2007.

Post-recession, financing business expansion, development, redevelopment and obtaining personal home mortgages have undergone significant change. Equity investment in projects has become more difficult to obtain, and debt finance providers require significantly higher equity to debt ratios stronger credit ratings, and higher levels of personal and corporate guarantees. The rebound of investment financing has been slow during the recovery, particularly for small businesses.

Direct Foreign Investment in Miami Real Estate

Direct foreign investment in Miami-Dade has been a bright spot throughout the recession, supporting the growth of trade, trade services, finance, and real estate during the worst portions of the recession, and continues to grow since 2011.

Indicators of the increasing levels of direct foreign investment in Miami-Dade include 1) the high proportion of condominium sales, and more recently, single-family homes, to foreign buyers 2) notable large-scale development projects financed by international equity investors, 3) the large-scale entry of foreign institutional investors into the commercial real estate market, purchasing major office and commercial real estate portfolios across South Florida.

Regional Transportation

Roadway congestion is a critical issue facing the region. According to the Texas A&M Transportation Institute (TTI), Miami is the 14th most traffic congested City in North America, and 11th most congested in the US. Average travel times across the County are above the national average, and for some workers living in the western and southern Commission Districts, travel times average 45 minutes each way, nearly double the national average.

Traffic congestion in Miami is a quality of life, environmental, and increasingly, one of its most pressing economic development issues. Employers seeking new locations are increasingly concerned with the lost productivity costs of congestion. According to the TTI, the annual total cost of congestion delays in the Miami area is 5th highest in the nation, at over $3.7 Billion. This cost is increasing, potentially hampering the region's competitive advantages for new job creation.

Between 2015 and 2035, Southeast Florida transportation agencies plan to spend approximately $58 billion on improving the region's roadways and transit. However, the Miami-Dade Metropolitan Planning Organization (MPO) forecasts that even with this spending, roadway level of service on nearly all major roads throughout Miami-Dade will continue to degrade over the next 15 years, rush-hour speeds will be 20% slower than they are today, and traffic congestion will continue to increase. Many road segments in the County are already at or above capacity.
The region's traffic congestion issues are a product of population growth, limited land to add new road lanes, limited mass-transit options, and land-use patterns. The bulk of the City's businesses and jobs are concentrated in six zip code statistical areas — the corridor stretching from downtown through Miami International Airport to Doral, while most of the County's population lives in the arc outside of the City of Miami at mostly suburban residential densities.

DISTRICT PROFILE: SEVEN KEY AREAS

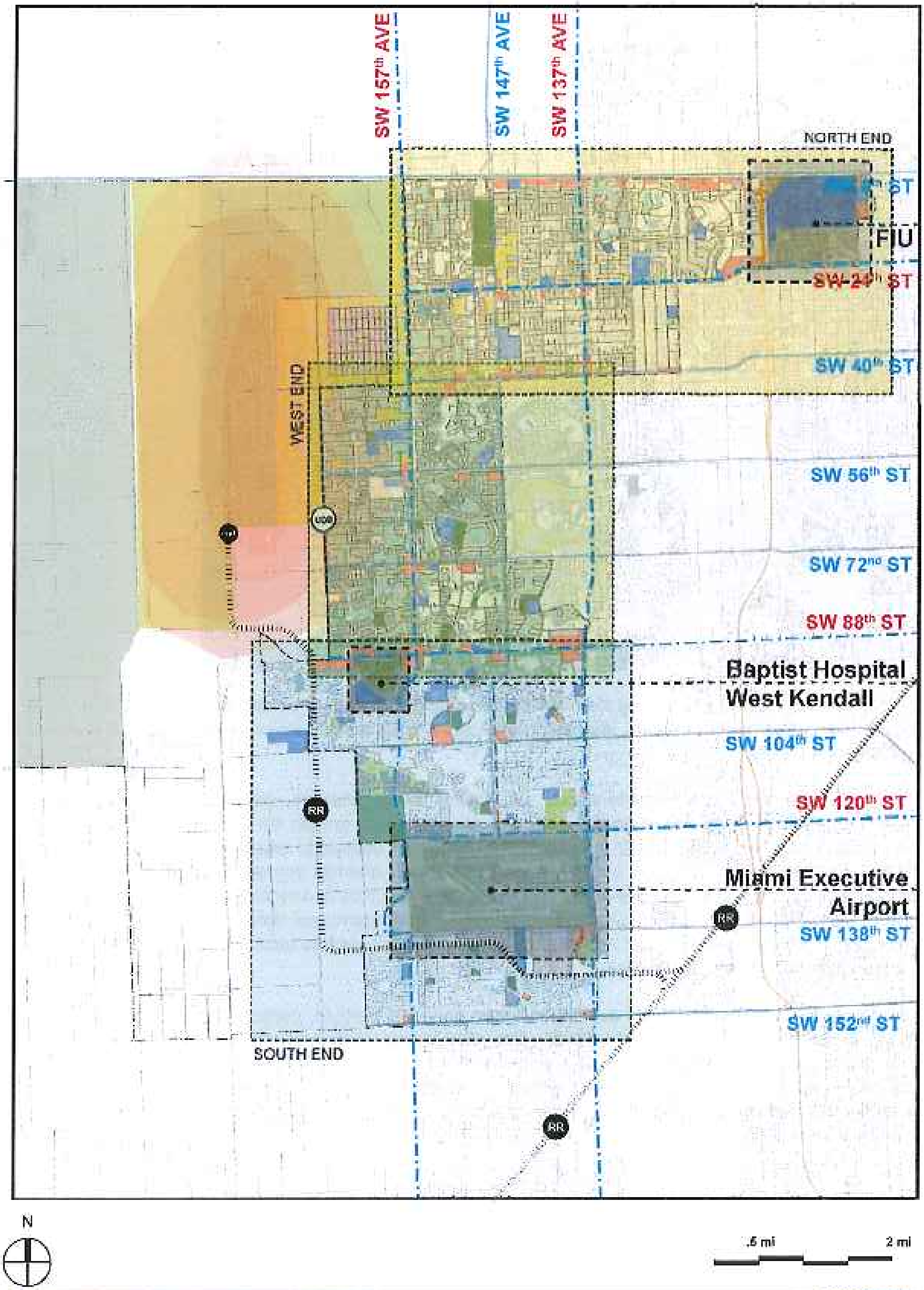
This section of the Report includes a review of the context of Regional Growth and Seven Key Areas: demographics, land use, housing, transportation, environment, industry and identity.

This profile targets the key vectors that are central in the analysis, strategic planning and management of sustainable maintenance and growth for cities and urban areas. Regional growth encompasses the larger context in which any community must operate. Taking into consideration not only districts immediately adjacent to the West End, but the larger metropolitan region that is described as Miami-Dade County. We looked at comparative cities, spatio-temporal data from multiple sources and government and administrative data provided by local, state and national authorities.

The seven key areas range from qualitative issues linked to lifestyle, perceptions of place and the quality of community life. We also looked at quantitative data that describes the characteristics of the general West End population, their resources, how they use them and where they are located. The assets, strengths, weaknesses and opportunities of the West End were discernable through these various approaches.

West End Aerial 1

SUB-AREAS: NORTH, SOUTH + WEST END



DEMOGRAPHICS

Demographic Profile of Residents

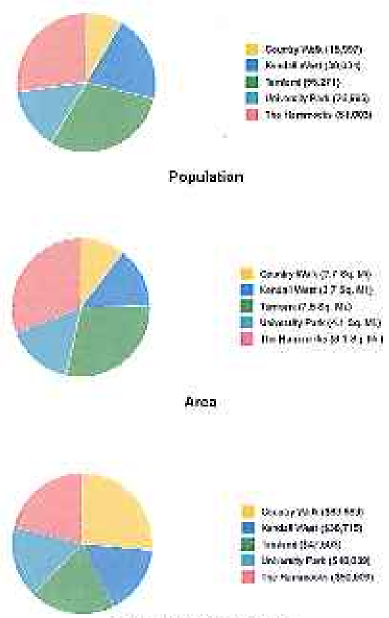
Population and Demographics

West End in Context

According to the US Census Bureau, the 2010 population of the West End totaled 213,839 persons, or 8.6% of the County population. The West End is the County's second most populous, just behind Commission District 9. The West End is a significant urbanized area — its population is equivalent to the 100th largest City in the Nation and the 7th largest City in Florida. The population of the West End is bigger than the cities of Birmingham, Spokane, Fayetteville, Tacoma, Akron, Tallahassee, Fort Lauderdale, Gainesville, and West Palm Beach.

The West End functions as part of a larger urbanized corridor, however, as its residents work, shop, recreate and travel in the larger urban area that also includes County Commission Districts 10 and 12. ***Considered as a single urbanized area, the 2010 combined population of Commission Districts 10, 11 and 12, at 588,906 persons represent an area equal to the 32nd largest City in the in US and the second largest City in Florida. The combined population of Districts 10, 11 and 12 is bigger than the cities of Albuquerque, Tucson, Kansas City, Atlanta, Miami and Tampa.***

Demographics by Neighborhood



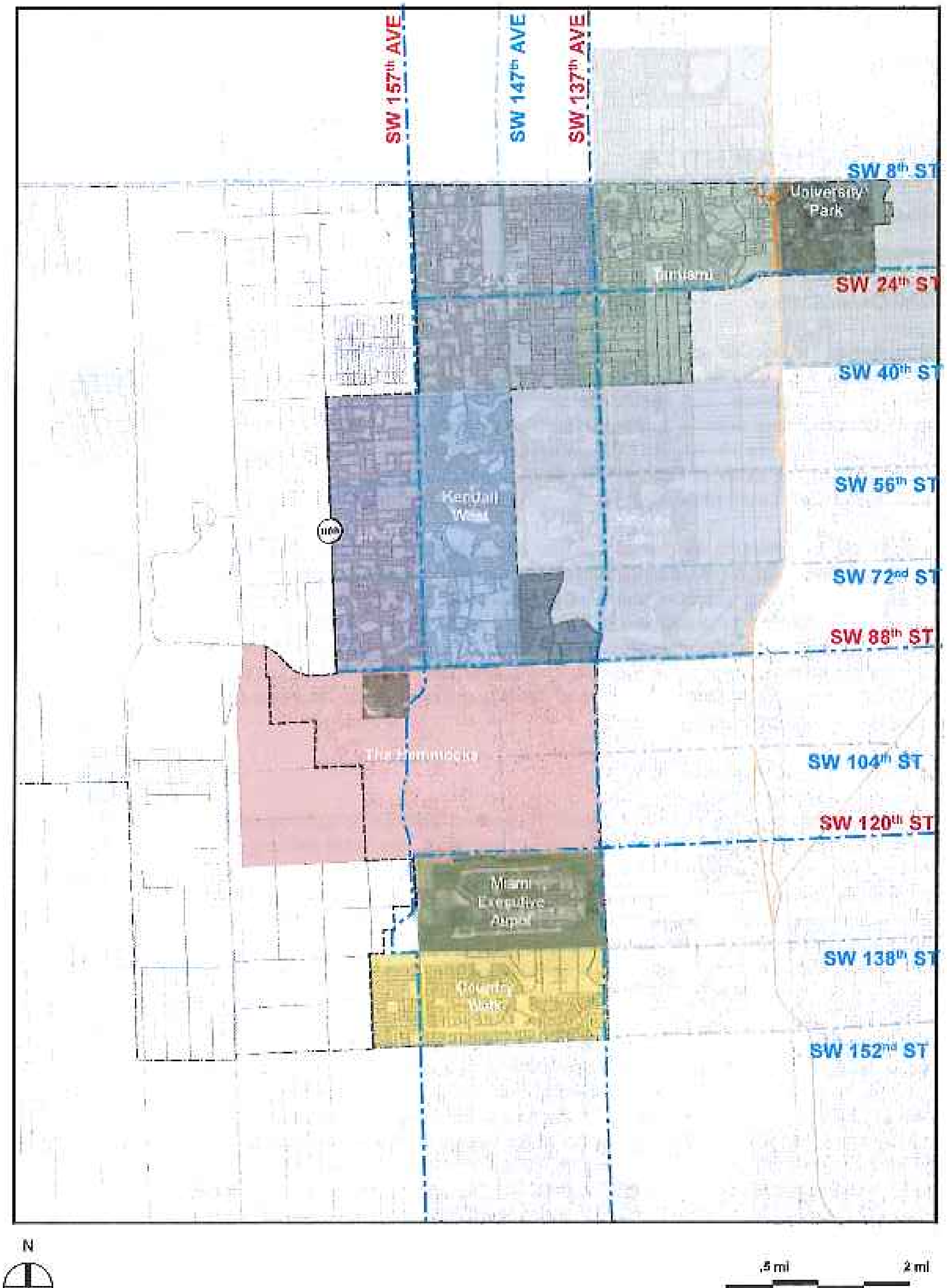
The West End Population Growth

The West End grew by 20.4% from 2000 to 2010, second fastest among Commission Districts and nearly double the County's rate of increase. The rapid delivery, and demand for new housing throughout the West End since the 1990's contributed significantly to the County's overall population growth. With less land available for new housing, the West End's rate of population growth can be expected to slow. ***The West End's current annual growth rate, approximately .9% annually, is half the growth rate experienced from 2000 to 2010.***

Population Dynamics

The West End's population dynamics mirror those of the County and Metro Area – a unique pattern of international in-migration since 2000. According to US Census estimates, in the six Zip codes that cover the West End, the number of new residents who have immigrated from abroad grew in absolute numbers and as a percentage of total migration into the West End since 2011. Of the more than 25,391 residents estimated to have moved into West End's six Zip codes in 2013, 67% moved from within the County, while 10.8% (2,835) moved to the West End from abroad. Annual migration from within the County, as a portion of West End population growth, actually ***decreased*** 11% since 2010, migration from other counties in the US remained the same, while international in-migration increased over the same period.

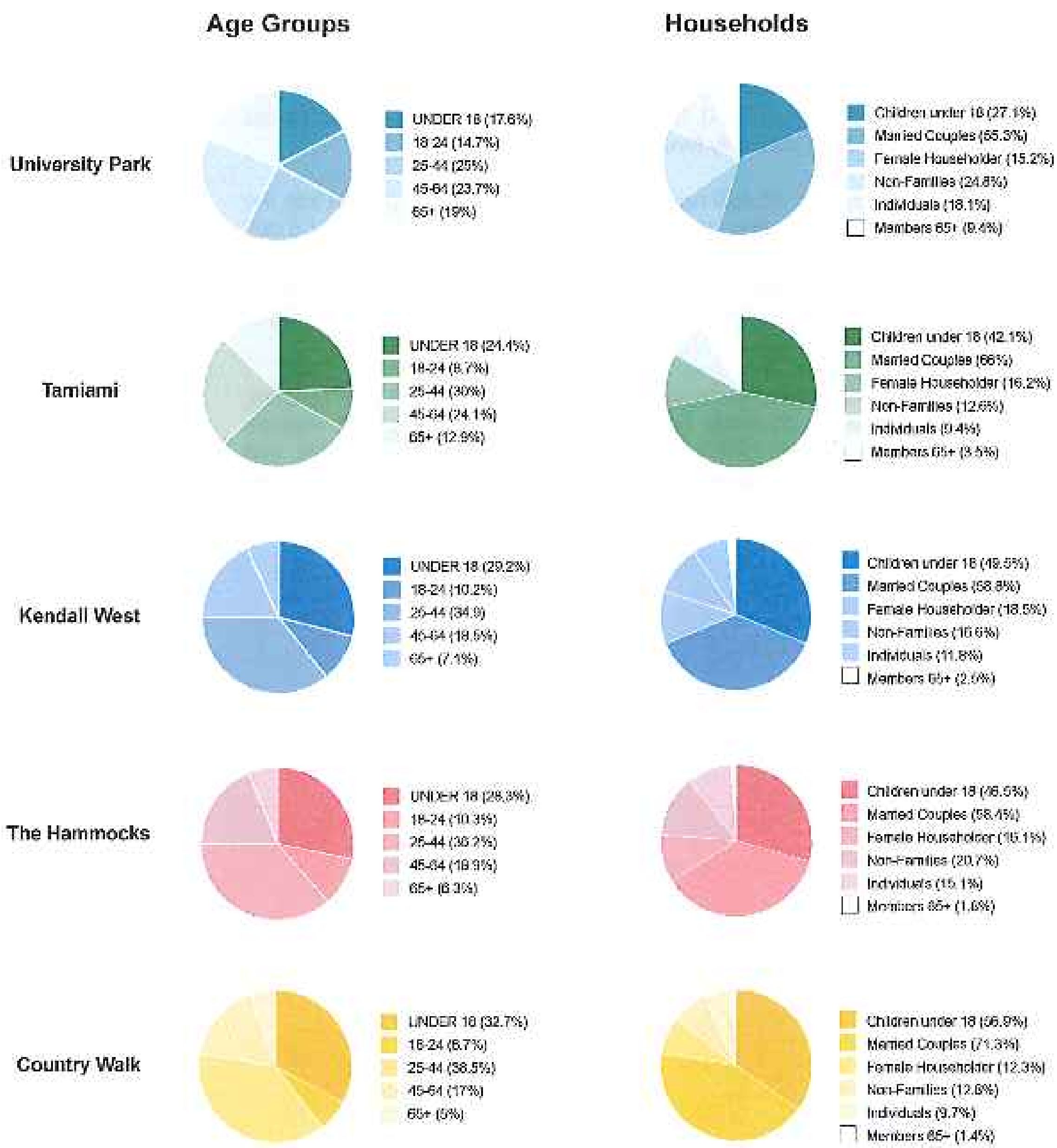
DEMOGRAPHICS



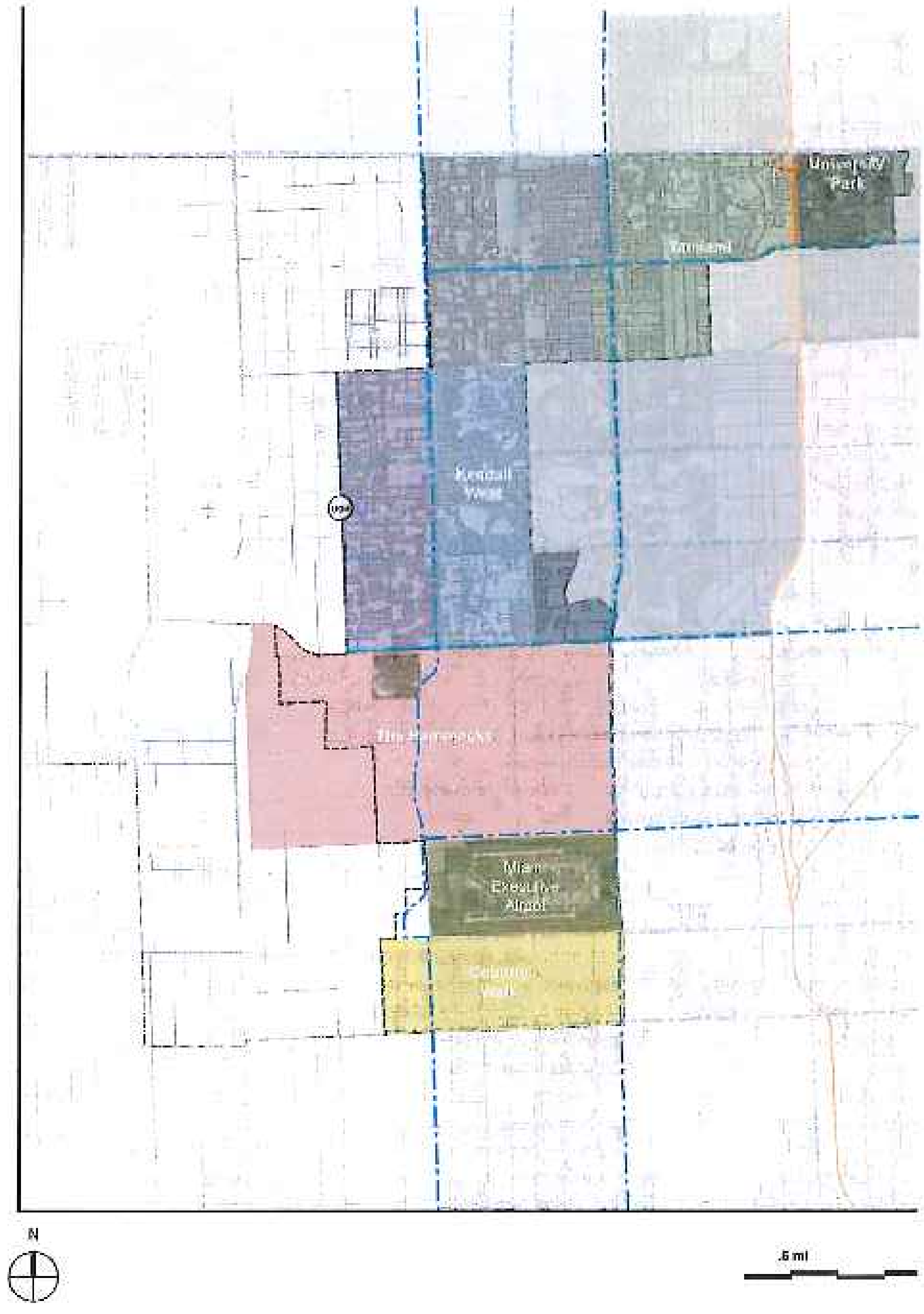
International in-migrants are now 10.3% of all new migrants into the West End Communities. As a result of the West End's sustained and growing pattern of international in-migration since 2000, 55% of the population of the six Zip Codes covering the West End are currently foreign Born.

In 2010 through 2013, over 25,000 new residents per year have moved into the West End according to estimates, yet its population increase is just over 6,000 persons for the same time period due to a high rate of out-migration. Despite the resilience provided by international in-migration, retaining residents with long-term vested interests in the community and the region improves economic stability, innovation and job growth.

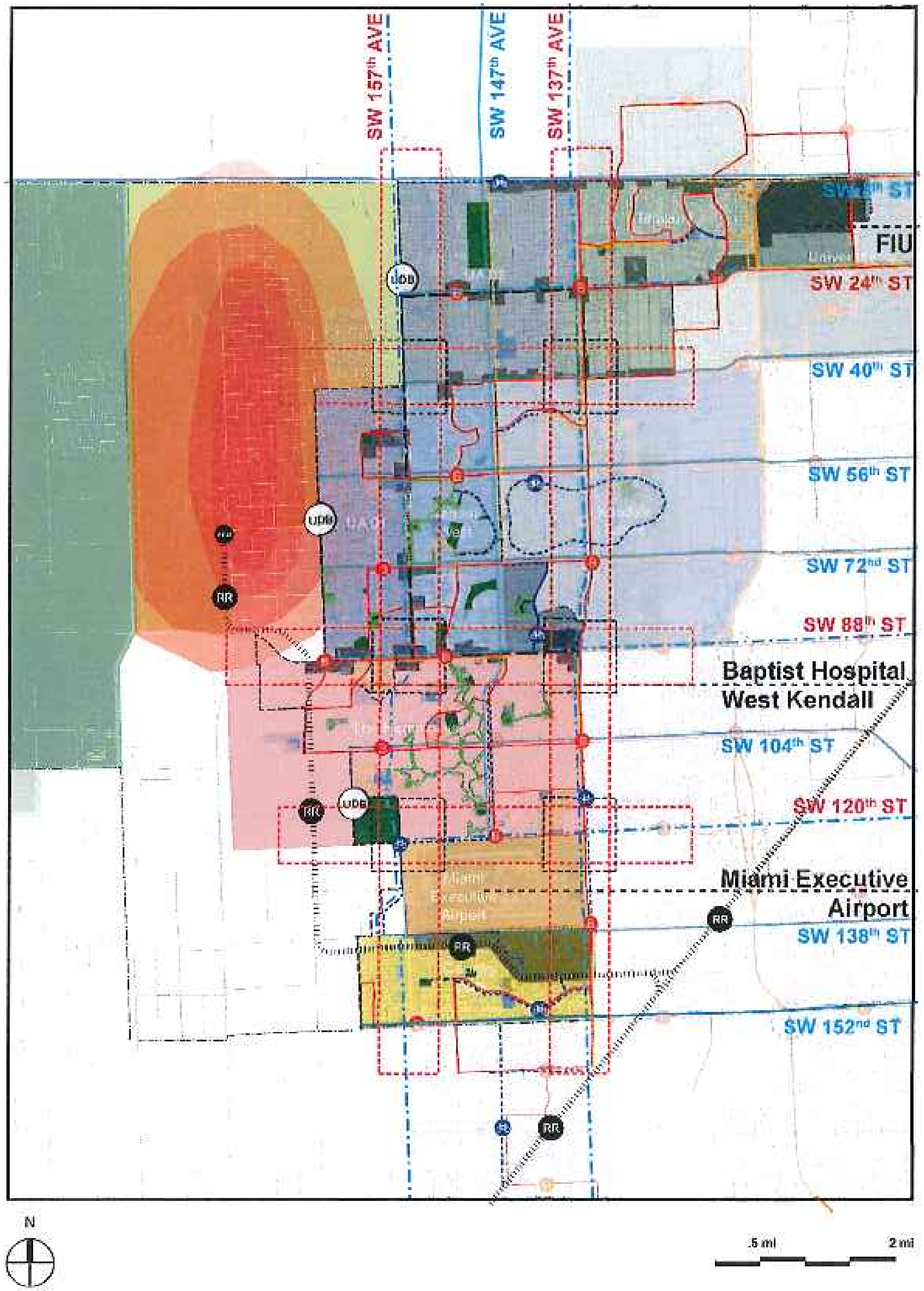
The West End has been a popular residential address for families with children, with very high proportion of family households and households with multiple children. Eighty-three percent (83%) of households are family households, and the average household size, at 3.34 persons per household, is the largest among County Commission Districts.


Age Groups
Households
University Park
UNDER 18 (17.6%)
18-24 (14.7%)
25-44 (25%)
45-64 (23.7%)
65+ (19%)
Children under 18 (27.1%)
Married Couples (55.3%)
Female Householder (15.2%)
Non-Families (24.8%)
Individuals (18.1%)
Members 65+ (9.4%)
Tamiami
UNDER 18 (24.4%)
18-24 (8.7%)
25-44 (30%)
45-64 (24.1%)
65+ (12.9%)
Children under 18 (42.1%)
Married Couples (66%)
Female Householder (16.2%)
Non-Families (12.6%)
Individuals (9.4%)
Members 65+ (3.5%)
Kendall West
UNDER 18 (29.2%)
18-24 (10.2%)
25-44 (34.9)
45-64 (18.5%)
65+ (7.1%)
Children under 18 (49.5%)
Married Couples (58.8%)
Female Householder (18.5%)
Non-Families (16.6%)
Individuals (11.8%)
Members 65+ (2.9%)
The Hammocks
UNDER 18 (28.3%)
18-24 (10.3%)
25-44 (36.2%)
45-64 (18.9%)
65+ (6.3%)
Children under 18 (46.5%)
Married Couples (58.4%)
Female Householder (15.1%)
Non-Families (20.7%)
Individuals (15.1%)
Members 65+ (1.6%)
Country Walk
UNDER 18 (32.7%)
18-24 (6.7%)
25-44 (38.5%)
45-64 (17%)
65+ (5%)
Children under 18 (56.9%)
Married Couples (71.3%)
Female Householder (12.3%)
Non-Families (12.8%)
Individuals (9.7%)
Members 65+ (1.4%)

CONTENTS



EXISTING CONDITIONS



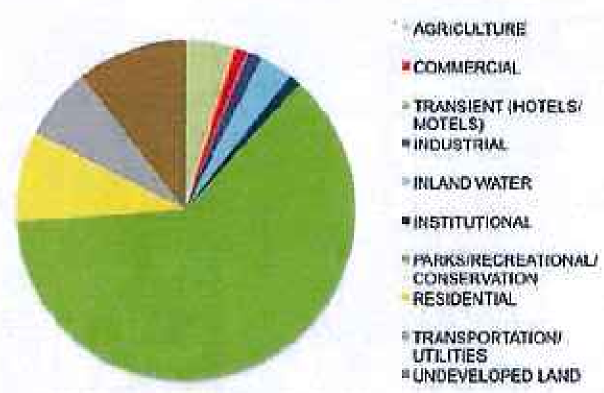
LAND USE AND ZONING

Land Use and Zoning

Land use and zoning are the primary tools used to control land development and the density of buildings, amount of surface parking, and green space. Land use describes the existing use of land as defined by the county Property Appraiser. Zoning ordinances are the current allowable uses of land and characteristics of structure on any given property. This includes building height, percentage of open space to buildings, number of parking spaces and allowable expansion zones. Additionally, future land use designations are used to incentivize the land use types and densities determined desirable by a county and/or city. Future land use determines how and where development occurs.

The relationship between current/future land use and zoning was considered in comparison to two specific additional contexts in this study: 1) transit and transportation infrastructure, and 2) the perceived identity of the community.

Links between transportation and development are traditionally strong and easily argued.[1]



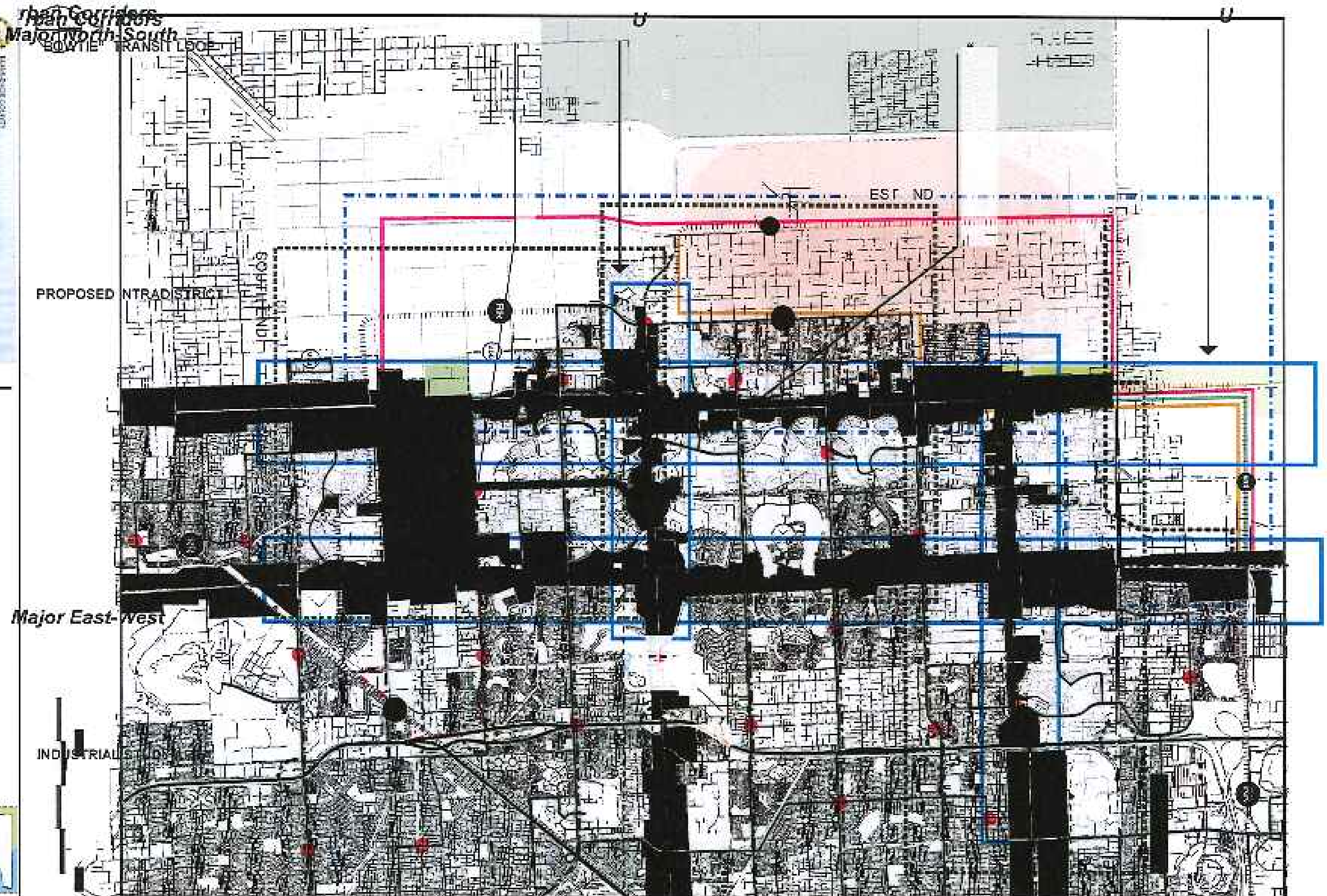
Key Land Use Characteristics

The West End successfully developed a high-quality stock of single family and low-density multi-family housing. These basic qualities have proven strong in the regional market, and helped stabilize the West End's economy and housing market during the recession (see Housing in this report). The major findings relating to land use patterns and the future of the West End are as follows:

Density

While residential development of the West End is characterized as high quality

MAJOR CORRIDORS



relative to the rest of the County, the development land use pattern of the West End is for the most part suburban and very low density in character, resulting in long driving times, dependence on automobiles for even short trips, and poor pedestrian access to most retail uses and amenities, including parks.

Residential

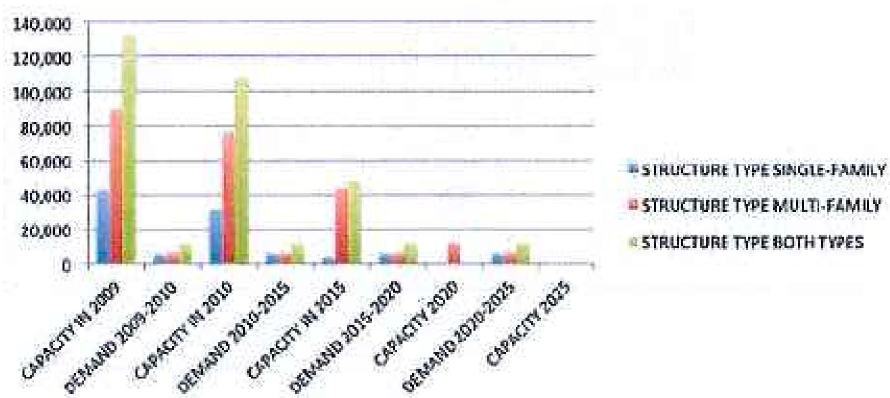
The West End has been an extremely popular and attractive location for homebuyers and retail developers, to the point that it has a very low inventory of vacant and underdeveloped land amenable or zoned for significantly sized new development.

Restricted Uses

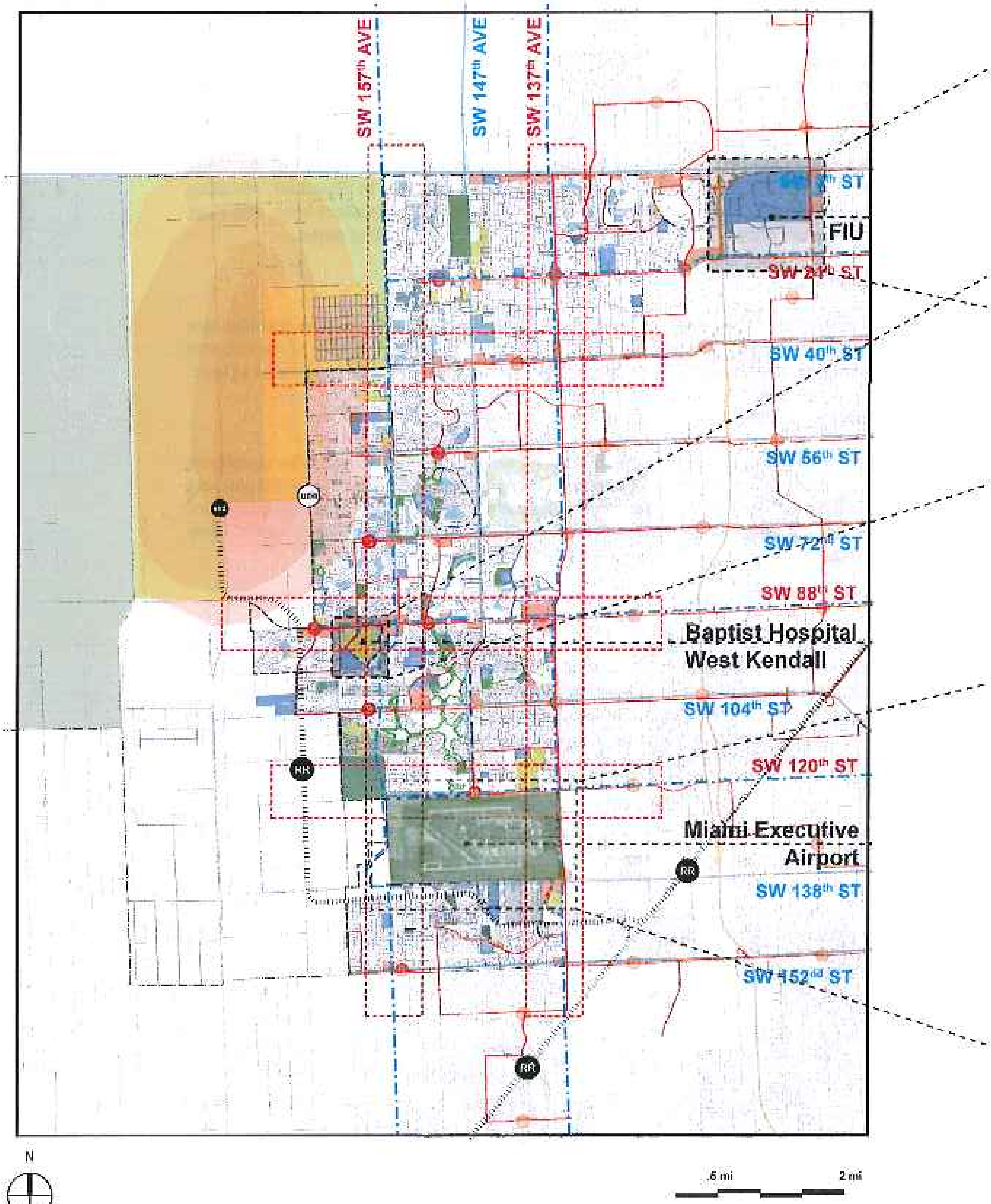
Remaining parcels within the Urban Development Boundary suitable for significant scale redevelopment must either be rezoned from restricted uses (institutional and agricultural), or be approved for development as part of the Urban Development Boundary amendment process, both of which can be costly, complicated, and time-consuming.

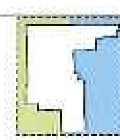
Retail

Even given its high relative household incomes, the West End has an over abundance of retail development, especially considering annual retail spending within the West End compared to the West End's total Household retail spending capacity. In addition, most of the retail development in the West End developed in commercial-strip form. This pattern is highly land intensive, and out of step with the provisions of the Miami Dade Community Development Master Plan (CDMP).



MAJOR INSTITUTIONS



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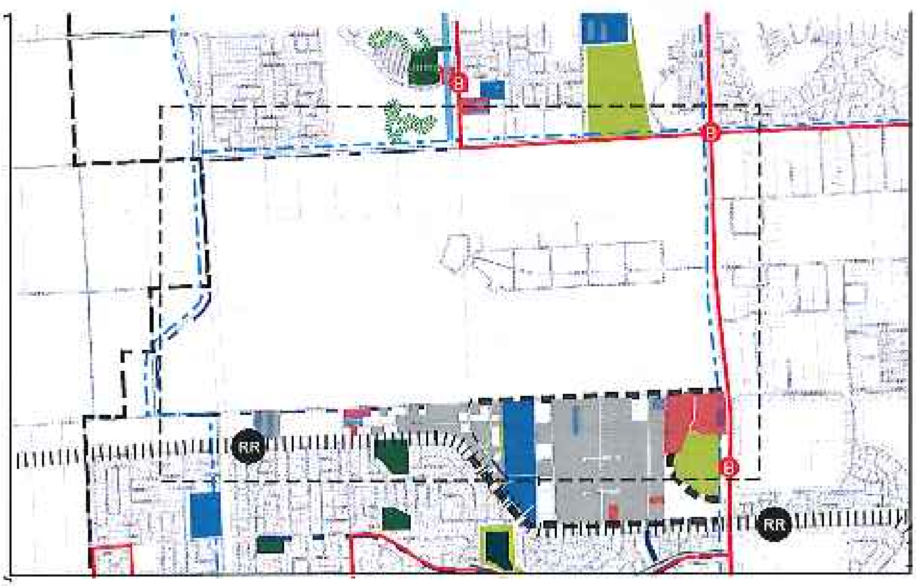


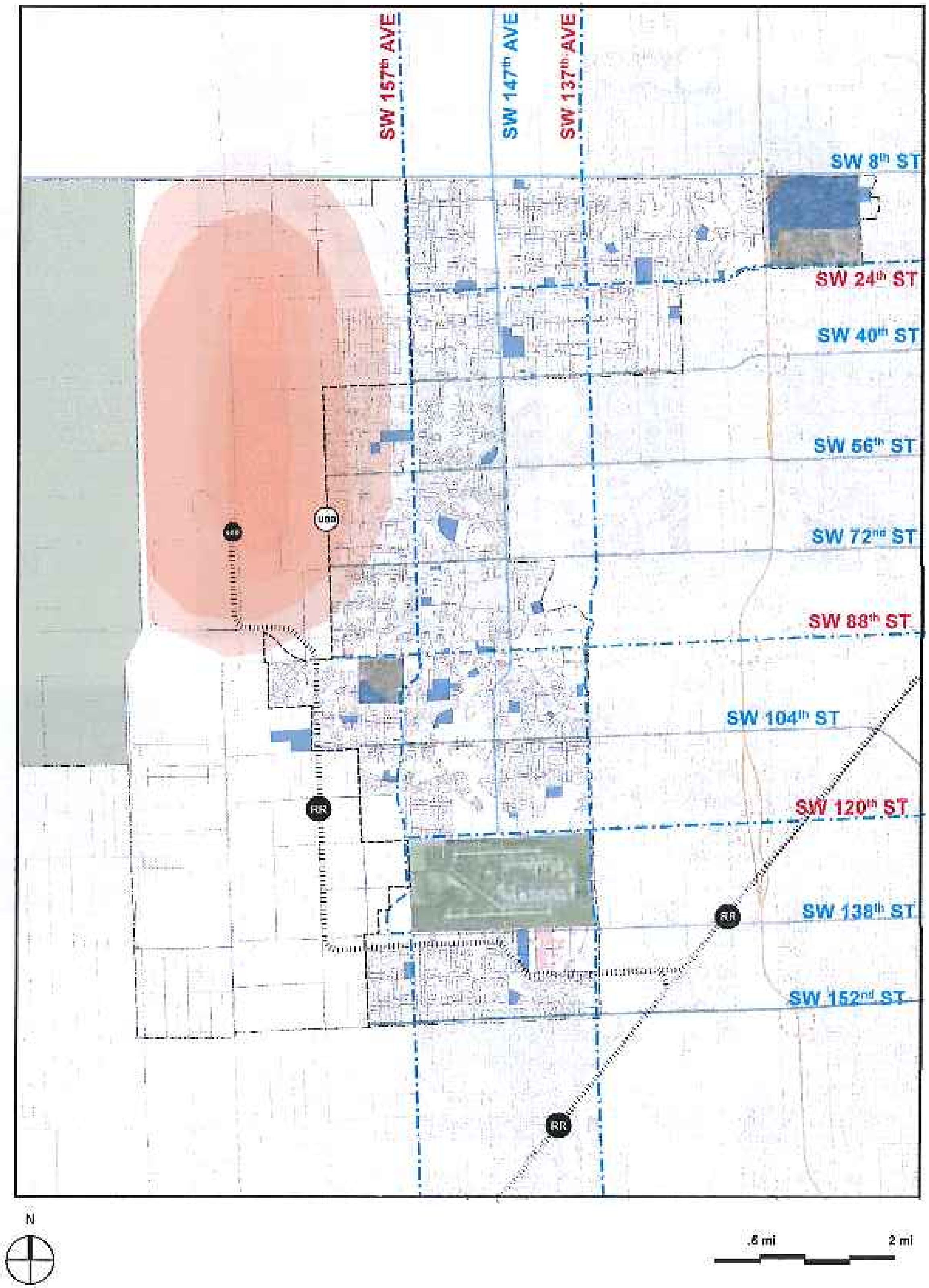

3

FIU, University Park 1

West Kendall Baptist Hospital 2

Miami Executive Airport 3

OFFICES + INSTITUTIONS



Land Use Inventory

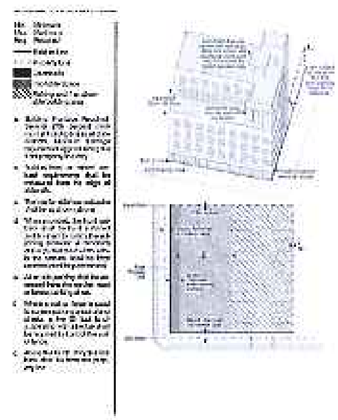
The current Land Use Inventory illustrates the following significant factors: 1) a very high proportion of Single Family Residential, 2) a relatively low proportion of Office and Multi-family, 3) a high proportion of "big-box" and strip mall type Retail, 4) little land use diversity, most land is singular use with very little mix-use development, 5) amount of vacant land zoned for development limited, 6) current developed land is significantly under-built to the allowable FAR (floor-to area ratio used to determine total allowable build-out in the zoning code).

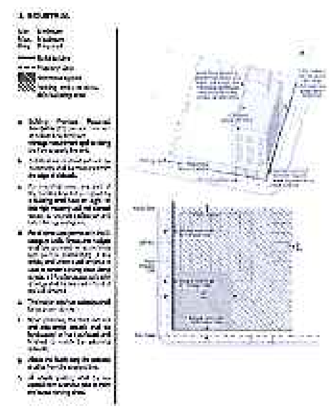
Walkability

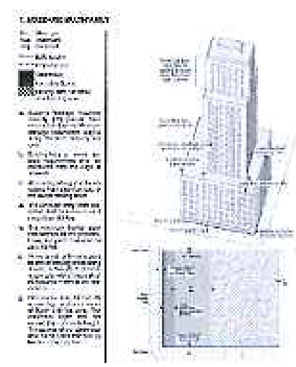
Walkability is limited. It is characterized throughout the West End by 1) a lack of connectivity between areas using current bike lanes, paths and greenspaces are isolated by neighborhood enclave walls, ditches and canals, 2) inconsistent side walk width and supply, 3) transfer opportunities between transportation modes is extremely limited.

Zoning

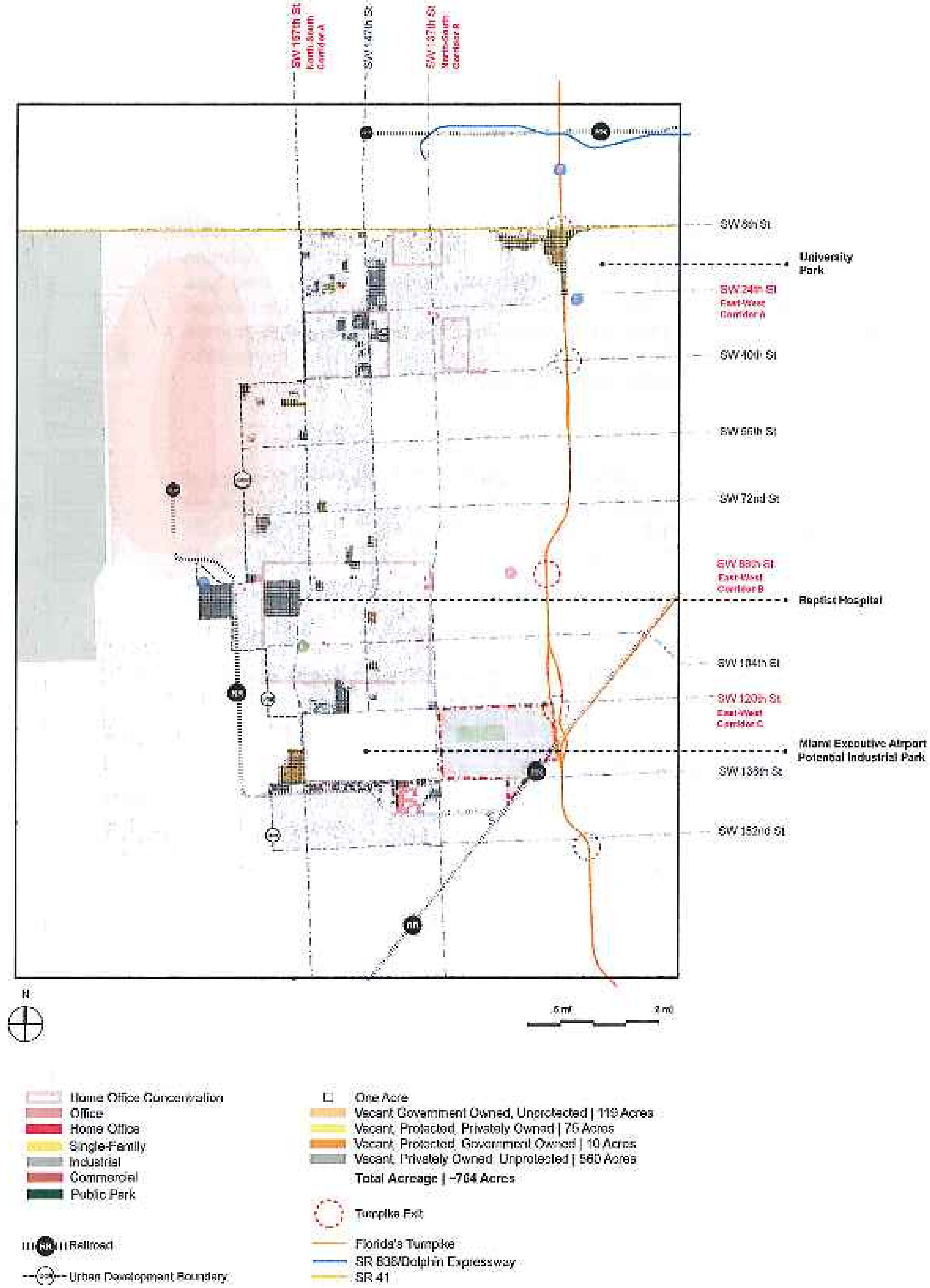
The existing County Master Plan allows for higher density and targeted mix-use development not currently being used. Target FAR is 60% over what is currently developed in our sample study area of 88th ST/Kendall AV (See Kendall FAR Corridor Study Map).

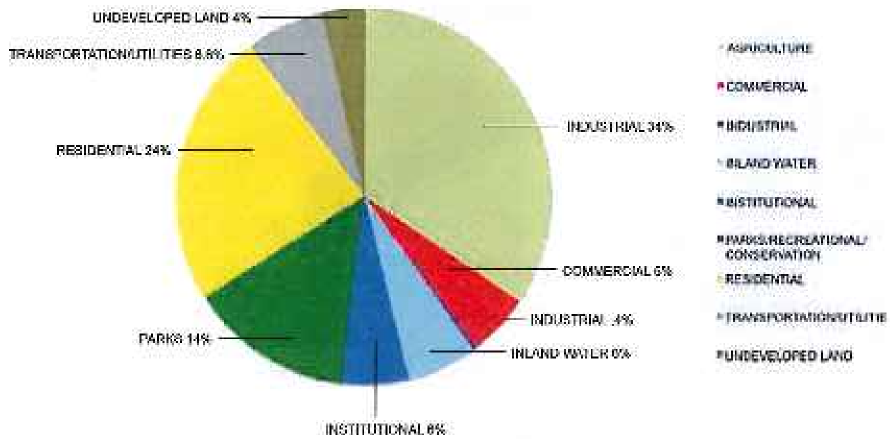






OFFICES + AVAILABLE LAND



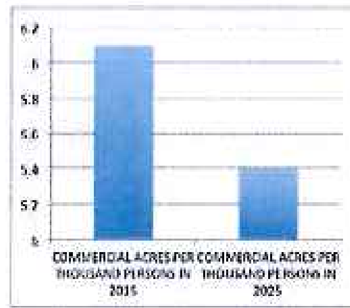


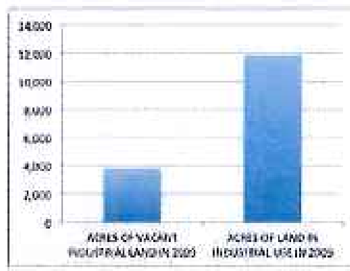
MIAMI-DADE COUNTY: EXISTING LAND USES			
LAND USE	TOTAL ACRES	TOTAL SQM	%
AGRICULTURE	61474.1	96.1	4.8
COMMERCIAL	13975.9	21.8	1.1
TRANSIENT (HOTELS/MOTELS)	724.7	1.1	0.1
INDUSTRIAL	17515.4	27.4	1.4
INLAND WATER	40963.9	64	3.2
INSTITUTIONAL	14287.4	22.3	1.1
PARKS/RECREATIONAL/CONSERVATION	790647.7	1235.4	62.2
RESIDENTIAL	109442.4	171	8.6
TRANSPORTATION/UTILITIES	87598.6	136.9	6.9
UNDEVELOPED LAND	134608	210.3	10.6
TOTAL	1271238.1	1986.3	100

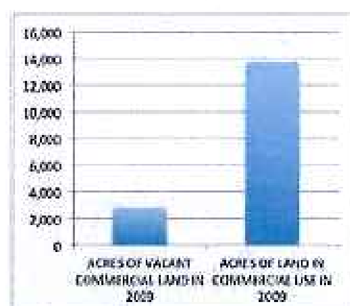
The comparison (above) shows current percentages of land use in the West End and in Miami-Dade County as a whole. The West End has a significantly higher percentage of residential (24%) compared to the County (8.6%), but also a surprisingly high percentage of Institutional use (6%) versus the County at 1%. The percentage of Industrial and Commercial Land use is higher, but this is accounted for by the greater surface area distribution including surface parking prevalent in the suburban development in the West End. Similarly, Residential development in the West End is primarily single-family houses RU-1 or AU (see diagrams) with large parcel size relative to built area. Office space accounts for only 10% of the total commercial use in the area. Industrial land use in the County is almost three times (1.4%) the West End (0.4%). Coincident with the perception of significant amounts of green space and inland water, the West End has twice the relative percentage of Inland Water, only ¼ the amount of Parkland, but almost 8 times the amount of Agricultural land use than the County as a whole.

The West End is on par with the County for Transportation and Utilities, but has less than half (4%) comparatively of Undeveloped Land. The land use distribution in the West End suggests a highly developed residential use, high Institutional use, moderate Commercial and Parks, and low Industrial.

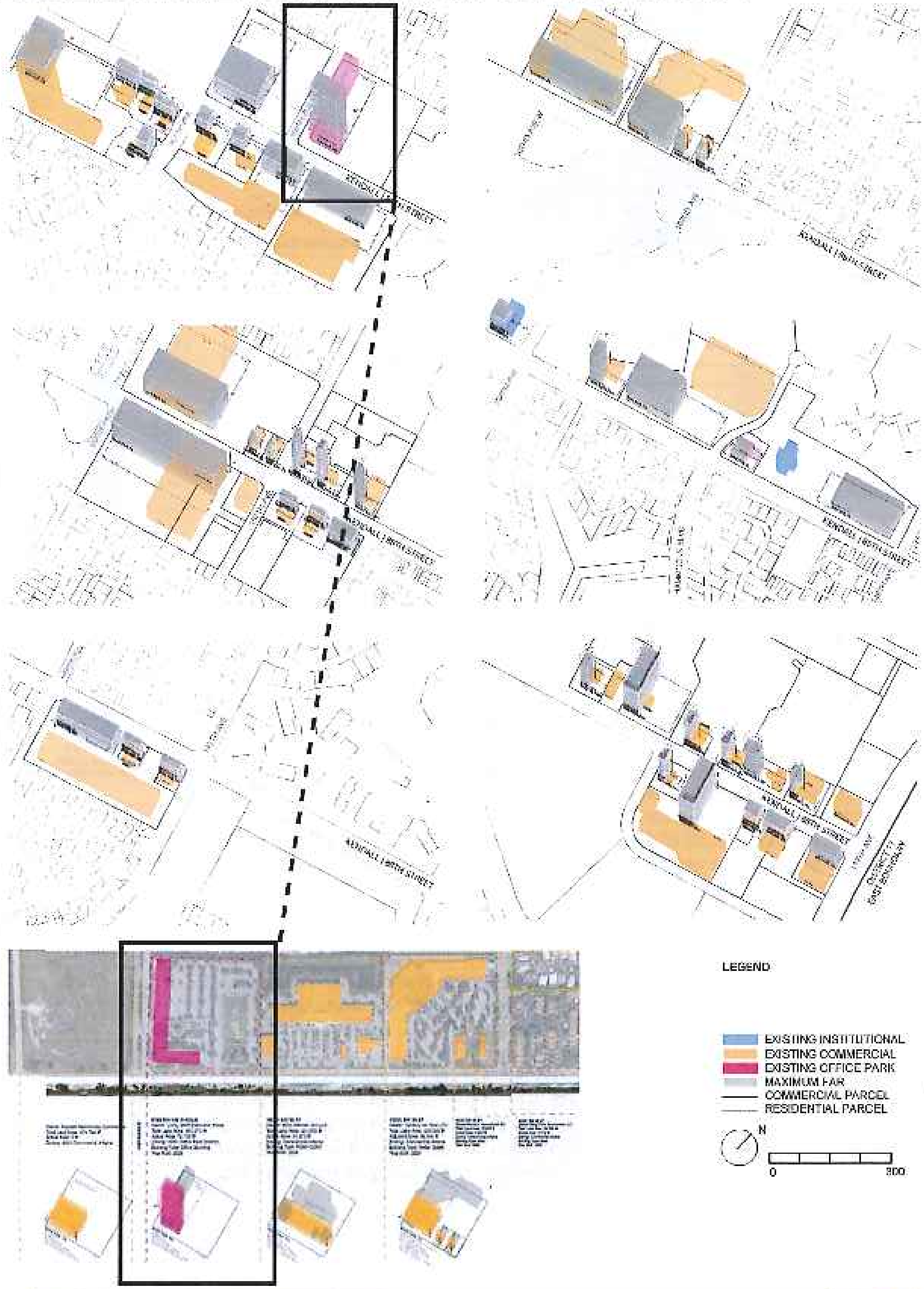
Current developable land in the West End is concentrated in three areas: 1) SW 147th St between SW 40th ST and SW 8th ST., 2) SW 88th ST at SW 157th ST adjacent to West Kendall Baptist Hospital; 3) SW 138th ST adjacent to Miami Executive Airport. There is additionally land west of FIU that will be developed as part of the university expansion area. Specific land use types permitted are outlined in Table: Land Use Category.



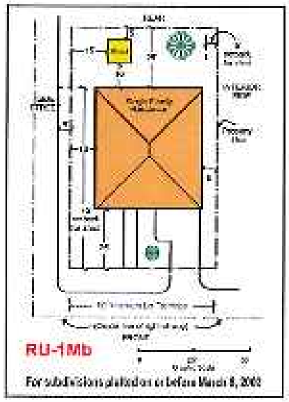


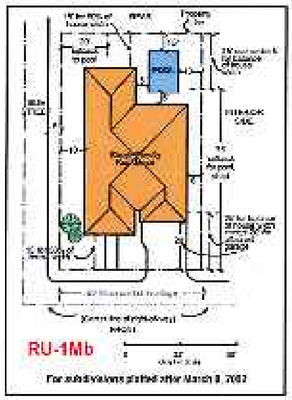


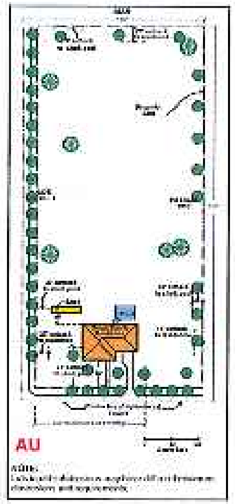
KENDALL COMMERCIAL CORRIDOR FAR STUDY

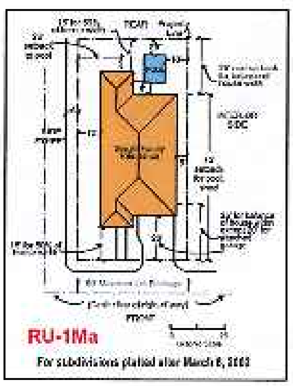


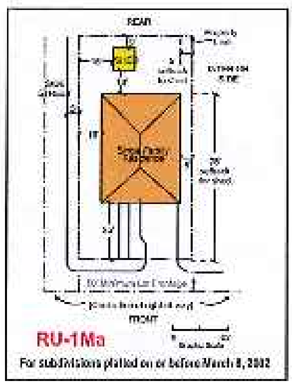
The study team analyzed the potential available vertical development envelope in comparison to the actual developed area along the Kendall/88th St. commercial corridor. The Kendall corridor has the highest concentration of commercial uses including retail, entertainment and service-oriented retail in the West End. Office space also occurs in this zone, however, the highest concentration of office space is adjacent to the Miami Executive Airport.

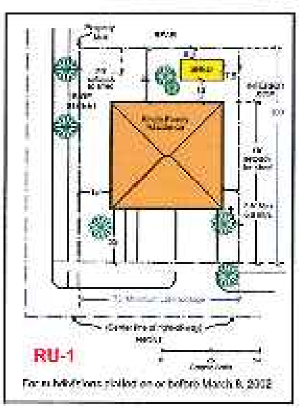


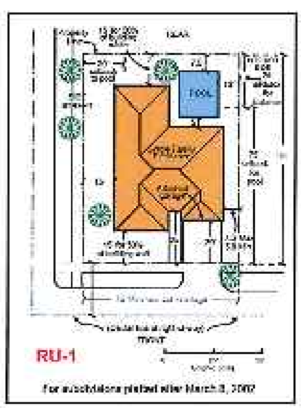




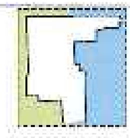








KENDALL + 137th AVE INTERSECTION FAR STUDY



FAR or floor-to-area is used as a mechanism in the zoning code to determine the maximum allowable building envelope. The FAR is the ratio of a building's total area to the size of the piece of land upon which it is built. We calculated the FAR for 90% of the properties in along SW 88th ST /Kendall Corridor. The current developed property is significantly underbuilt, approx. 30% of the potential build-out allowable according to the Zoning Code (see FAR Diagrams and Kendall Commercial Corridor Study).

[1] Cervero, Robert (1997). *Urban Design Issues Related to Transportation Modes, Designs and Services for Neo-Traditional Developments.* Remarks presented at the Urban Design, Telecommunication and Travel Forecasting Conference, August 1997. Internet:http://www.fhwa.dot.gov/planning/tmip/; Day, Lisa G. (1997). *Urban Design, Telecommunication and Travel Forecasting Conference: Summary, Recommendations and Compendium of Papers.* Prepared for the Travel Model Improvement Program, August 1997. Internet:http://www.fhwa.dot.gov/planning/tmip/; Handy, Susan (1996). *Methodologies for Exploring the Link Between Urban Form and Travel Behavior.* Transportation Research D, Vol. 1 No. 2.; Hess, Paul; Anne-Vernez Moudon, Mary C. Snyder, and Kiril Stanilov (1999). Site Design and Pedestrian Travel. Presented at the 1999 Transportation Research Board Conference, Washington, D.C. (Paper #990424).; Steiner, Ruth L (1994). *Residential Density and Travel Patterns: Review of the Literature.* Transportation Research Record 1466.

NORTH WEST END - ENLARGED AREA

PUBLIC TRANSPORTATION

- Transit Lattice
- Park and Ride Lot, Under Development
- Proposed Park and Ride Lot
- Existing Park and Ride Lot
- Proposed Intradistrict Loop
- Undeveloped
- Mid-block crosswalk
- Future pedestrian bridge
- Intersection improvements
- Proposed Intradistrict Loop Stops

CSX TRANSPORTATION

- Railroad
- Railway "Connector"

LAND USE

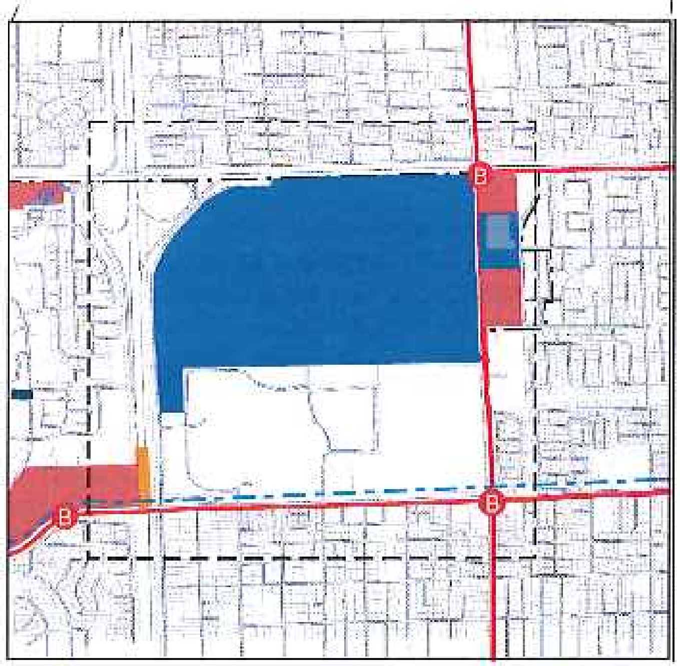
- Parks
- Lakes
- Institutions
- Schools
- Commercial/Retail
- Offices
- Home Offices

PEDESTRIAN/BIKE PATHS

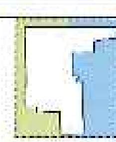
- Pedestrian Path
- Bike Path
- Pedestrian Path/Bike Path "Connector"

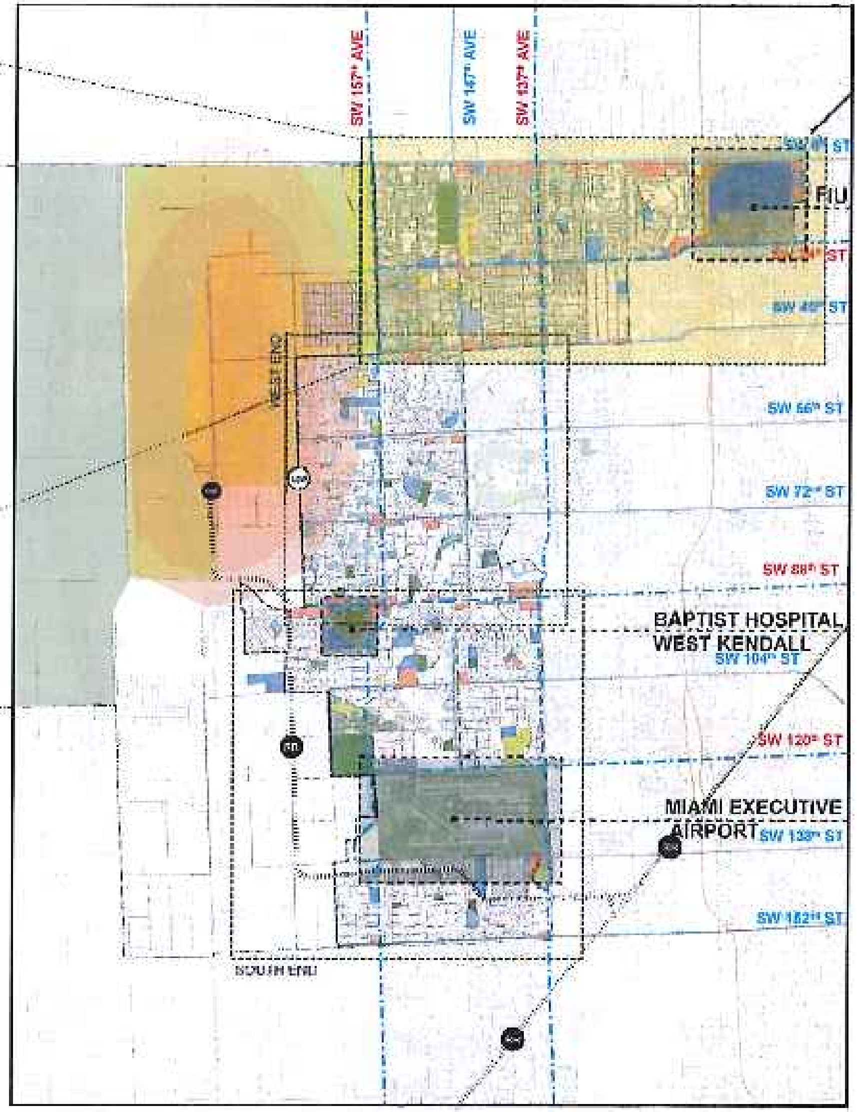
HIGHWAY

- SR 836/Dolphin Expressway
- Florida Turnpike
- Turnpike Exit
- District boundary



FLORIDA INTERNATIONAL UNIVERSITY





North West End

Significant residential use, moderate commercial development along SW 24th ST (East-West Corridor A) and a large institution, Florida International University, characterize the North West End. The proposed Bow-Tie Transit Loop, either bus route or trolley route, moves through this area along SW 24th ST between SW 137th ST and SW 157th ST (North-South Corridors A and B respectively), both streets designated Urban Corridors in this study. The map shows proposed stops. Commercial and retail development is concentrated along the east-west streets of SW 8th ST and SW 24th ST with very little north-south development. The largest green spaces in the area are located on the university grounds and Tree Island Park and Preserve. The International Gardens Park and Wesley Matthews Elementary, Zora Neale Hurston Elementary and Thomas Jr. High are within a 1-mile radius. Lincoln Marti Child Care Center, Zelda Glazer Middle School, Holmes Braddock Senior High, and Joe Hall Elementary are within 1-mile radius of Tree Island Park and Preserve.

North West End Typical Commercial 1

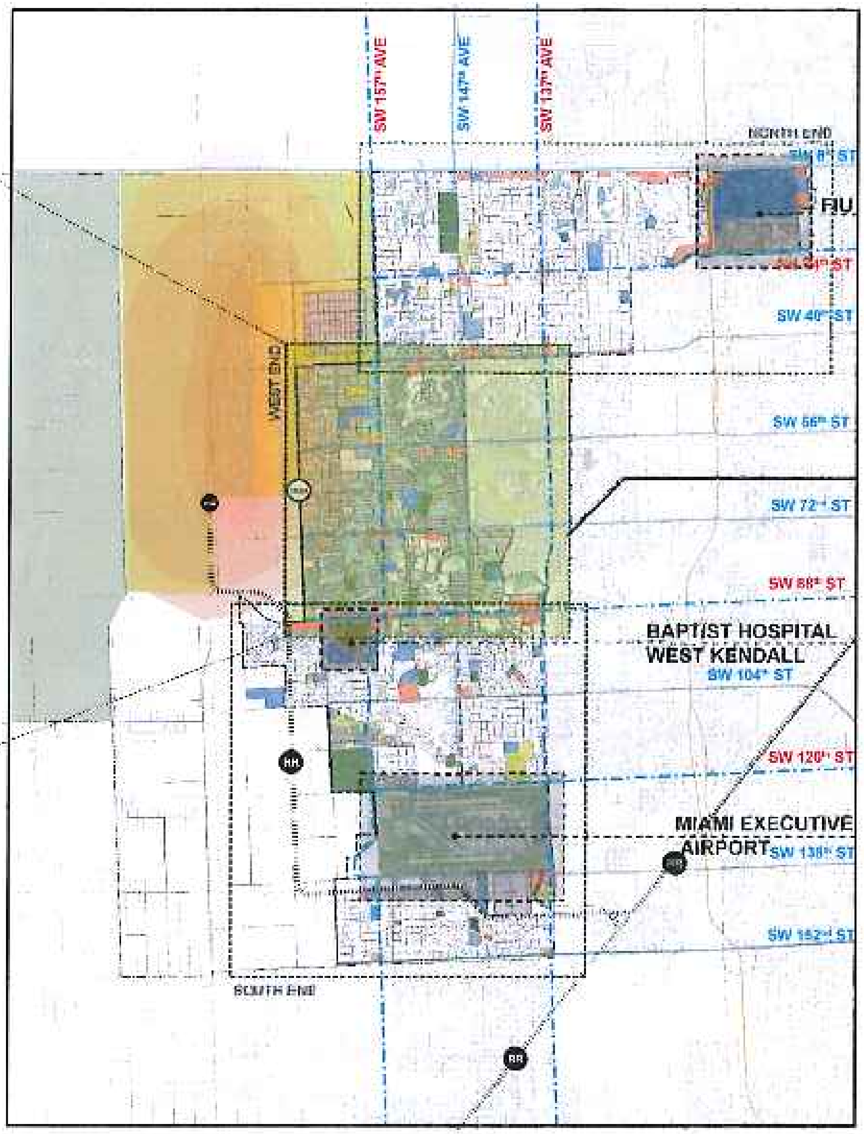
North West End Typical Residential 2

North West End, Aerial. 3

FIU, University Park 4

CENTRAL WEST END - ENLARGED AREA

BAPTIST HOSPITAL
WEST KENDALL



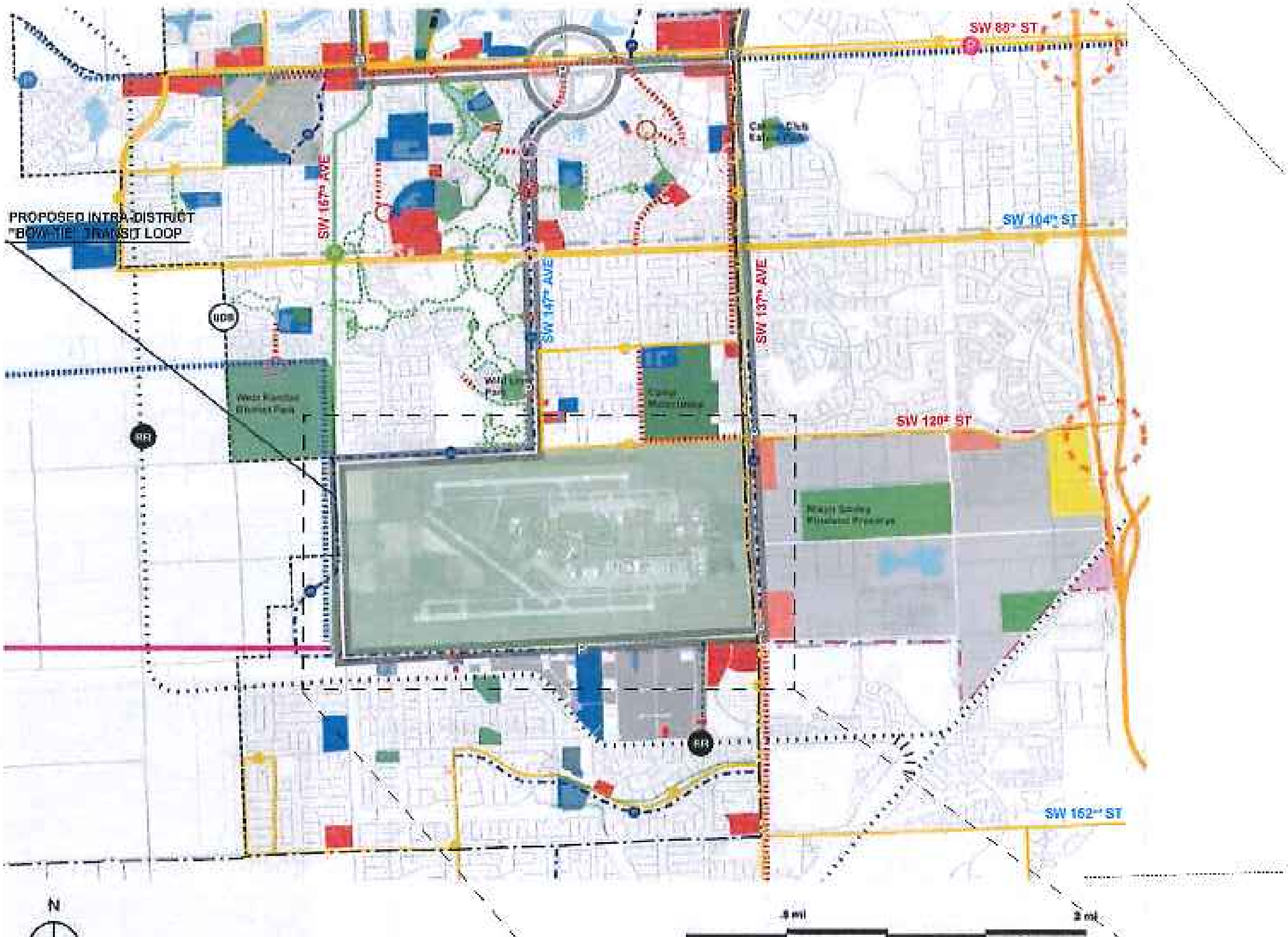
Central West End

The Central West End includes the Kendall Corridor also known as N Kendall Dr. (SW 88th ST/East-West Corridor B) and both north-south Urban Corridors: SW 137th ST and SW 157th ST (North-South Corridors A and B). The Bow-Tie transfer station that connects the north and south loops (See Intermodal Circulation Loops Map) is located at the intersection of SW 88th ST and SW 147th ST. The southern portion of the Bow-Tie Loop follows SW 147th ST until the intersection at 120th ST (East-West Corridor C). Located in the Central West End is West Kendall Baptist Hospital (a significant institution in the Central West End) adjacent to the currently undeveloped largest undeveloped property in N Kendall Dr.[1], Kendall Lakes Plaza retail center, and Kendall Village Center with the Regal Kendal Village Regal Stadium 16 cinema (N Kendall Dr. and Hwy. 821). Hammocks Community Park and Water Oaks Park located in the Central West End are within ¼ mile and have several schools (Felix Varela High School, Hammocks Middle School), the West Kendall Public Library, and multiple houses of worship.

West End Central Typical Commercial 1
Central West End Typical Residential 2
West Kendall Baptist Hospital 3

[1] One of the proposals for this property is the Kendall Town Center mix-use development.

SOUTH WEST END - ENLARGED AREA



PUBLIC TRANSPORTATION

- Transit Lattice
- Park and Ride Lot, Under Development
- Proposed Park and Ride Lot
- Existing Park and Ride Lot
- Proposed Intradistrict Loop
- Undeveloped
- Mid-block crosswalk
- Future pedestrian bridge
- Intersection improvements
- Proposed Intradistrict Loop Stops

CSX TRANSPORTATION

- Railroad
- Railway "Connector"

LAND USE

- Parks
- Lakes
- Institutions
- Schools
- Commercial/Retail
- Offices
- Home Offices

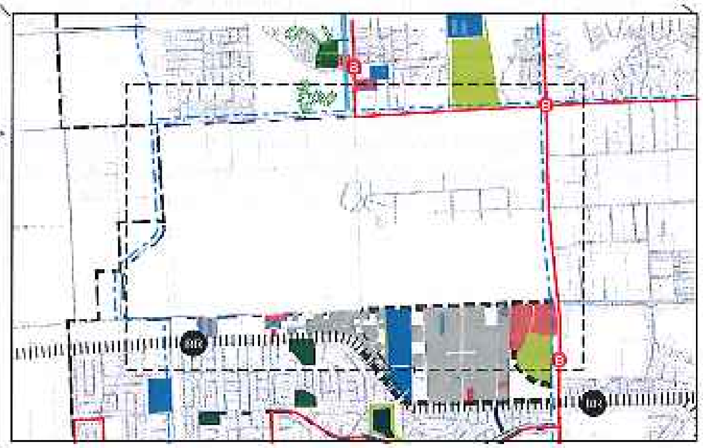
PEDESTRIAN/BIKE PATHS

- Pedestrian Path
- Bike Path
- Pedestrian Path/Bike Path "Connector"

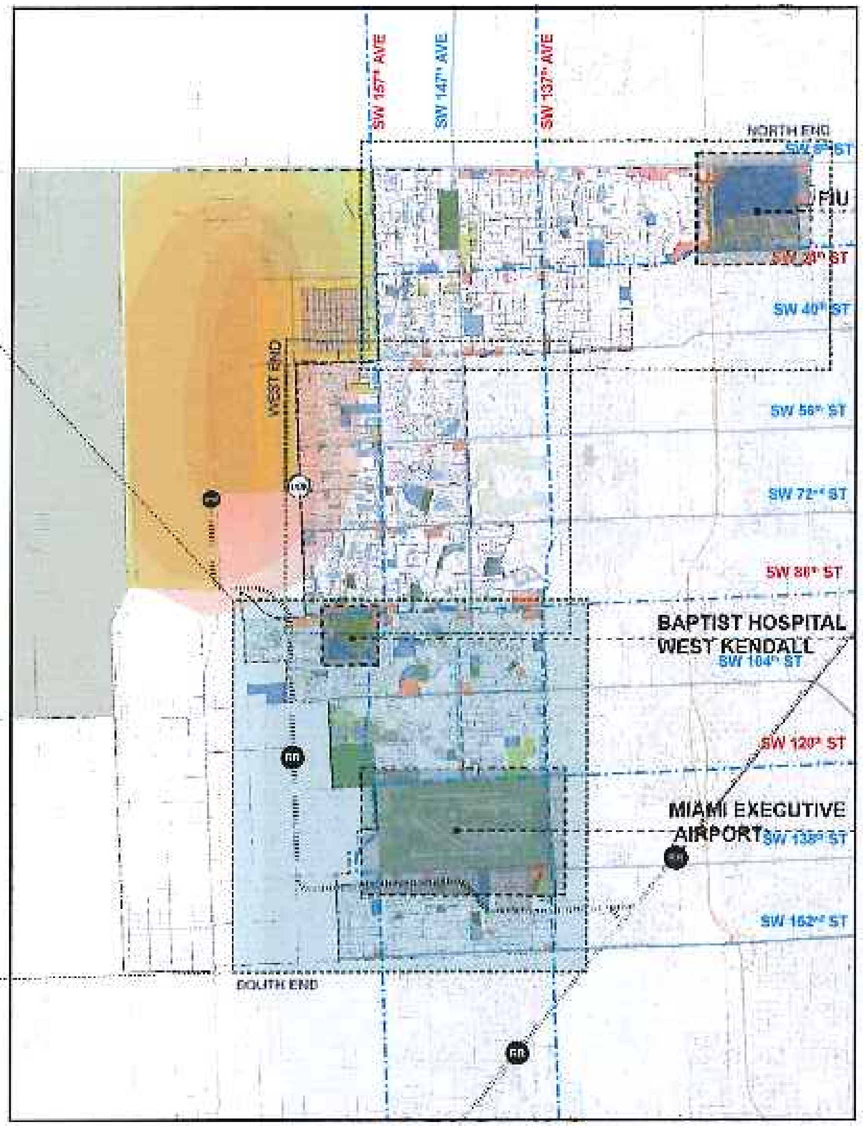
HIGHWAY

- SR 836/Dolphin Expressway
- Florida Turnpike
- Turnpike Exit

- District boundary



MIAMI EXECUTIVE AIRPORT



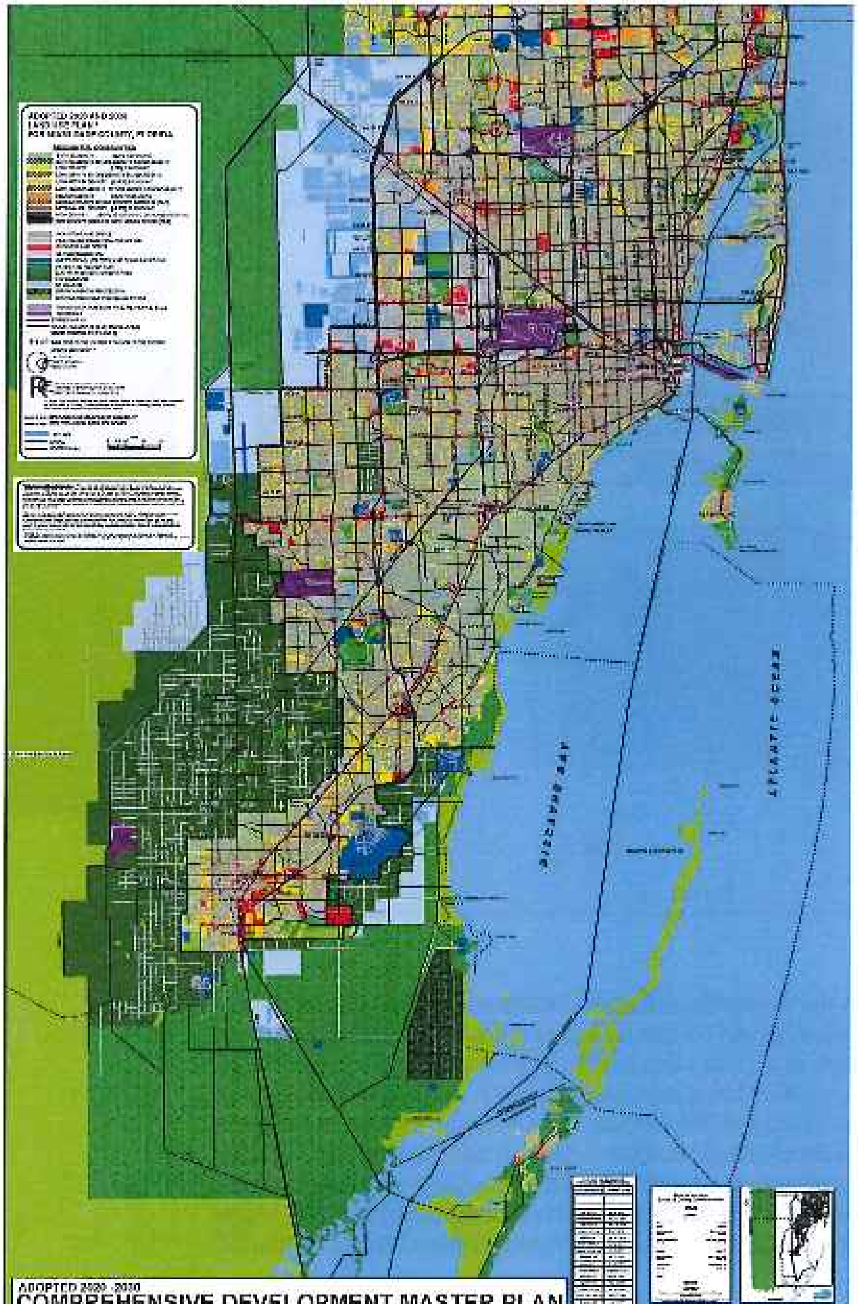
South West End

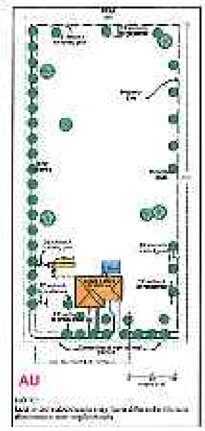
The largest institution in the South West End is the Miami Executive Airport. This area is characterized by the largest concentration of office space in the West End and the only concentration of industry around the airport and east toward District downtown Miami. There is also a large park, Boystown Pineland County Park, that serves as a locus for community activity. TCamp Matecumbe, located in the park, currently provides after school sessions where children can participate in various physical fitness, literacy, art and music activities. The Bow-Tie Transit Loop circles the Miami Executive Airport from SW 137th ST (North-South Corridor B) to SW 152nd ST, SW 157th ST (North-South Corridor A) and SW 120th ST (East-West Corridor C).

South West End Typical Commercial 1

South West End Typical Residential 2

Miami Executive Airport 3


ADOPTED 2020 - 2030
COMPREHENSIVE DEVELOPMENT MASTER PLAN
BISCAYNE BAY
ATLANTIC OCEAN



HOUSING

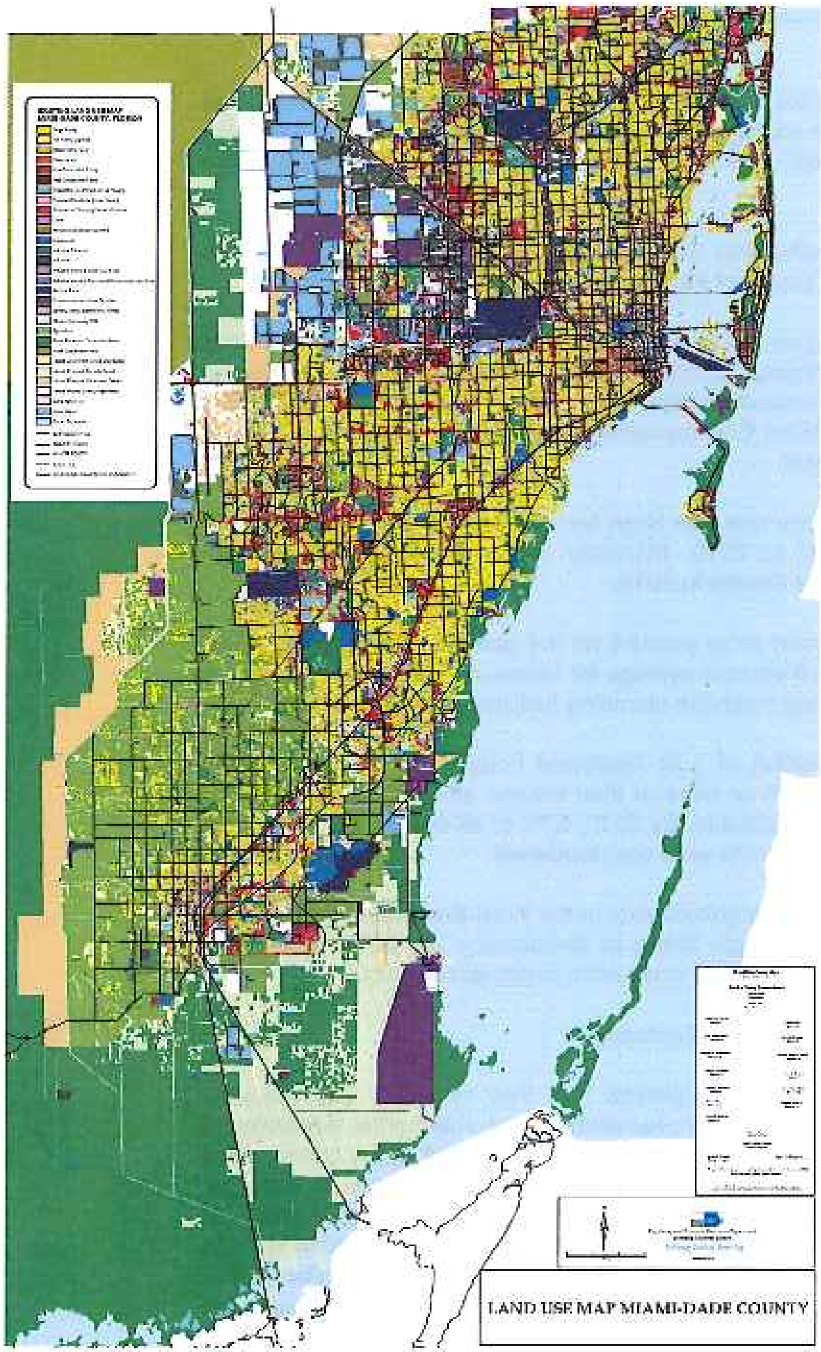
Housing

Historically, the West End housing market is one of the County's strongest. Fueled by available land and the region's population influx, housing demand has been steady, strong and resilient. The West End's important housing characteristics include the following:

- Total housing units increased 20 percent since 2000 to 2010 – to a current supply of 68,388 units.
- The highest percentage of homeownership among all Commission Districts. In fact, from 2000 to 2010 while the County homeownership rate declined from 57.7 percent to 55.8 percent, West End homeownership rate increased from 72.1 to 72.7 percent.
- The vacancy rate has been low and stable, rising from 4 to 5% from 2000 to 2010, markedly below the 2010 14.0 percent average for County in 2010.
- Overcrowded units account for 3.4 percent of all housing units, below the 5 percent average for Miami, and the lowest percent of units lacking complete plumbing facilities, only 0.2 percent.
- The proportion of cost burdened households — households spending 35% or more of their income on housing — increased over the last decade. By 2010, 57% of all owners and 64% of all renter households were cost burdened.
- Housing and neighborhoods in the West End are overwhelmingly low density, single family in composition. By 2010 76% of the West End 's housing stock were single-family units.

Post Recession Housing Market Performance

The West End Communities have proven that they remain a high demand destination for homebuyers, and a very resilient housing sub-market. According to Zillow.com, in the 8 zip codes covering the West End, as well as the communities just west of the Florida Turnpike, residential sales volume increased on average, 2.5% per month, each year since 2008, from a low of just over 2,400 units per year, to over 4,700 units per year in 2013. Sales through November 2014 indicate a slowing of sales volume to, 4,240 units, not including December sales. Other indicators of the continuing strength of the West End's housing market include the following measures:


LAND USE MAP MIAMI-DADE COUNTY

- Also according to Zillow, Median sales price value by the end of 2014 reached the same values as 2004-2005. Although median sales prices across the West End Community has not returned to peak values, overall median sales price increased 61% since the bottom of the West End's price trough in April 2011. In Zip Code 33193, median sales price increased 116%.

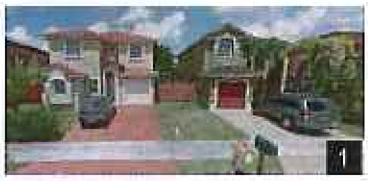
- The overwhelming majority of sales have been for exiting units. New units — those built since 2010 — make up less than 1% of the West End's housing stock. 84% of its homes were built before 2000, and 15.7% from 200-2010. However, reports from leading housing developers indicate extremely brisk sales for new homes.

- The small addition of new units to the West End's housing supply since 2010 has almost exclusively been single-family homes. 77% of the community's housing is single family.

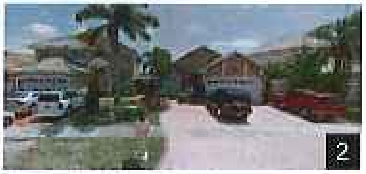
- Vacancy rates remain low — the west End's overall vacancy rate of 7.2% includes a 1.2% vacancy rate for owner-occupied units, and a 7.2% rate for rental units.

- Homes in foreclosure, as a proportion of total hosing units in the West End remain above regional and national averages. Foreclosure rates in the West End were among the highest in the County at the end of 2013, ranging from 2.63 to 6.18 foreclosures per 1,000 housing units. By November 2014, the County average was 3.61 foreclosures per 1,000 units for the same period. Foreclosure rates have improved; yet remain a concern, ranging from 2.13 to 4.69 foreclosures per 1,000 housing units. The County average is currently 2.58 foreclosures per 1,000 housing units. Looking at the increase in median home sales value, it appears that a possible sudden increase in supply from this "shadow inventory" of foreclosed homes never materialized, nor had a significant impact on home sale prices values in the West End.

- The number of cost burdened households remains high. Although less than 2010, the most recent Census estimates (2013) indicate 40% of all owners and 60% of all renters in the West End pay more than 35% of their income on housing.



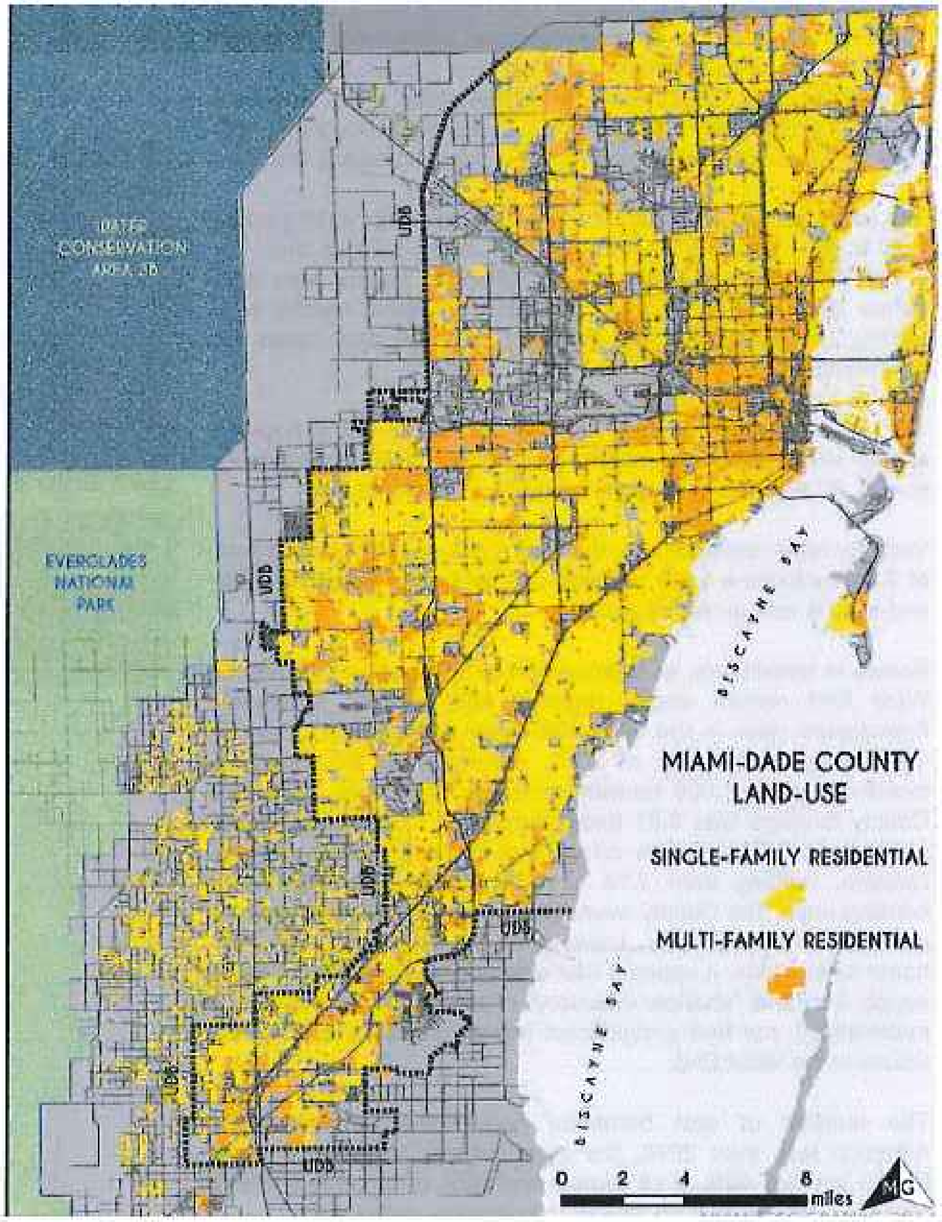
1



2

3

South West End Typical Residential 1
Central West End Typical Residential 2
North West End Typical Residential 3


WATER CONSERVATION AREA 3B
EVERGLADES NATIONAL PARK
UDB
BISCAYNE BAY
MIAMI-DADE COUNTY LAND-USE
SINGLE-FAMILY RESIDENTIAL
MULTI-FAMILY RESIDENTIAL
0 2 4 8 miles

Future West End Market Trends and Issues

Demand for the West End's existing stock of single-family homes remains steady. What remains to be seen is what impacts 1) the continuing shift of the region's households to rental housing, and 2) changing national and regional household formation patterns in the US and the region (to smaller and older households), will have upon the sales and development of new housing on the West End. Other issue impacting the West End's housing market includes:

- Land availability and the shrinking supply of development ready, approved vacant land for housing;
- The near and long term impacts of increasing transportation congestion on housing choice and sales in the West End (see Transportation analysis, below), and;
- Housing and community preference changes among young and older households seeking smaller, connected, and walkable communities.

In extensive interviews, each of the major housing developers active in the West End have anticipated changes in the demand market, as well as broader community concerns in concepts for possible new development in the West End. A sample of new plans included mixed-use developments, smaller footprint single family and low-density multi-family designs, as well as walking, biking and more extensive outdoor amenities. Also, recent projects have successfully incorporated green building elements into projects including low carbon footprint and automobile trip-reducing planned community design concepts.

DISTRICT 11 RESIDENCE-EMPLOYMENT MAP

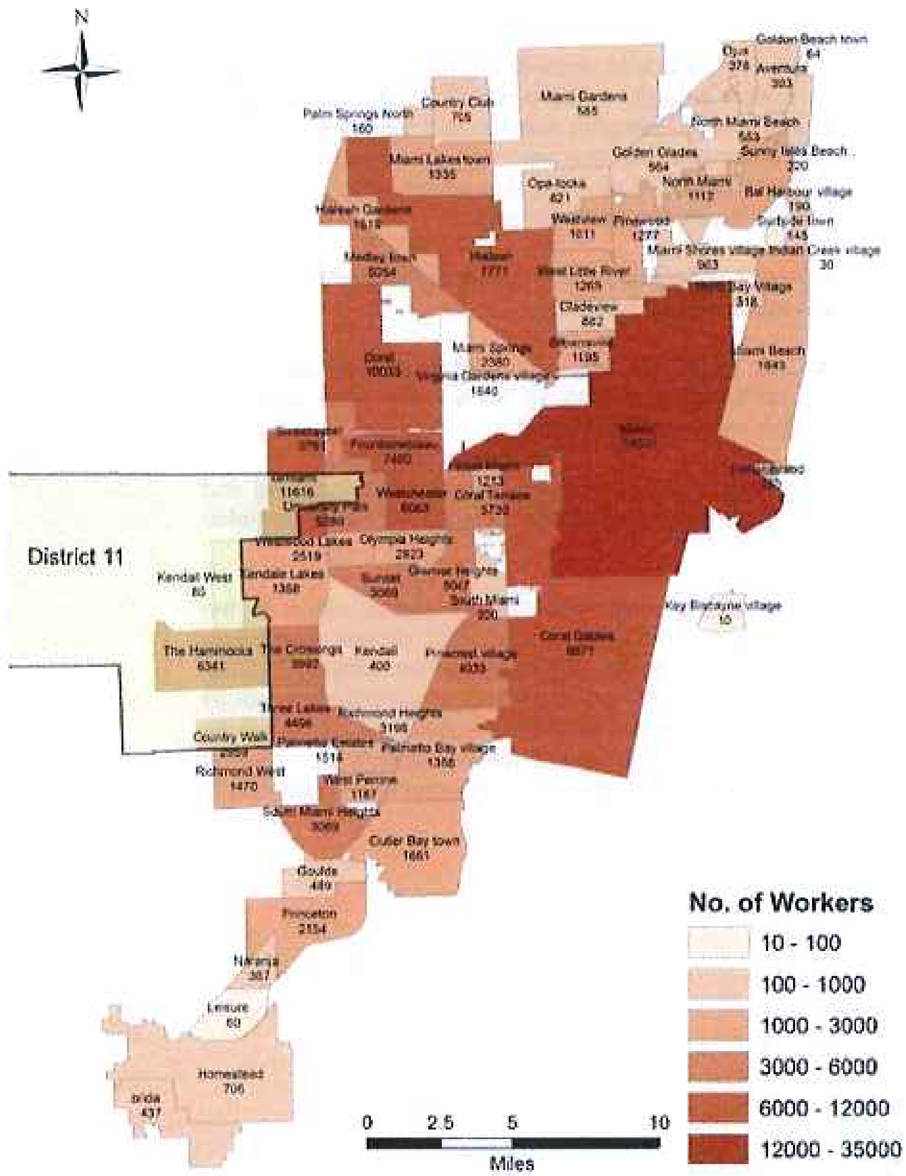


Figure 1. Workplace Locations for District 11 Residents

TRAFFIC and TRANSPORTATION

Transportation Conditions

Transportation featured prominently in public discussions regarding the District's strengths and weaknesses. The Project Team conducted its own analysis and model of trip demand in the West End. Its findings are as follows.

Inventory

A largely suburban area of the County, the West End is characterized by the following inventory and transportation infrastructure conditions.

- The West End is serviced by Major regional road arterials. Most of the West End's vehicle capacity is provided by its North-South roadways, including the Florida Turnpike, Krome, 121st, 157th, 147th, 137th, and 127th Avenues. Major East-West road capacity is provided by Sunset Drive (SW 72nd Street), Kendall Drive, Tamiami (8th Street), 42nd Street and 56th Street. Total Annual Average Daily Traffic (AADT) on the West End's major roadways exceeds 590,300 vehicles.

- The West End is also serviced by 13 Miami-Dade Bus Routes carrying 795,744 riders monthly as of December 2014. Bus Ridership on the lines serving the West End has increased by 1.4% from December 2013. However, 5 of the 13 bus lines lost riders from December 2013 to December 2014.

- Designed and built-out largely in the 1990's, the West End is typical of low density suburban development patterns, with high dependence on vehicle trips for conveniences, low walkability, and in some locations, difficult pedestrian conditions. Sidewalk availability is spotty, and the West End has limited on or off-road bike lanes and bike paths.

- ***Higher than average dependence and use of automobiles for work and non-work travel. Residents of the West End are automobile dependent — over 83% drive alone to work, compared to 76% for the remainder of the County. Despite Bus route coverage, only 2% of residents report riding the bus to work.*** Over 9% carpool, however.

Traffic Congestion Analysis

Based on most recent analyses by the County, Miami-Dade MPO, and South Florida Regional Planning Council, due to the intensity of land use development (coverage) with the District, few opportunities exist to expand and add additional lanes to the road network. ***At current development levels and patterns, significant portions of the road network inside, and connecting to the District will be at or over capacity within the next 5 to 10 years.*** The Project Team analyzed the structure of employment, commuter, and non-work travel patterns in the West End, modeling traffic loading on the existing road network.

The data used to complete the analysis included:

- Commute travel information from the 2006-2010 and 2009-2013 5-year American Community Survey (ACS)[1] conducted by the Census Bureau.

- Travel distribution conditions on the transportation network from the Southeast Regional Planning Model (SERPM) developed for the tri-county region covering Miami-Dade, Broward, and West Palm Beach. The model was developed and maintained by District IV of the Florida Department of Transportation (FDOT). Outputs of the model for year 2010 are obtained to examine how the traffic produced by the West End is being loaded to the network that represents the linkages that connects the West End 's residents to other places in the County.

- Basic traffic conditions from FDOT, such as the Average Annual Daily Traffic (AADT) volume, crash reports, freight and truck routes, etc.

West End Commuter Travel Characteristics

According to the 2008-2012 ACS estimates, 92,714 District 11 workers (87.9 percent) commute to their place of work by car, truck or van, of which, 83.1 percent drove alone. Only 2,110 workers (2 percent) use public transportation, excluding taxicabs. The mean travel time to work is 33.9 minutes one way compared to 29.1 minutes for Miami-Dade County. The mean travel time to work is highest in the Southwest (36.2 minutes) and Northwest (36.1 minutes) quadrants of the District. The higher mean commute times indicates that District 11 workers are traveling significant distances outside the District to their place of work.

Average daily commute times for residents of the District are among the highest in the Broward-Miami Dade region. Average commute time for District 11 residents are 38 to 45 minutes and higher. In general, a higher percentage of workers in the District have higher commute times (30 minutes and higher) than the County as a whole. Almost 13% of the West End's workers travel 60 to 74 minutes for work, compared to about 7.34% workers in the County.

The primary reason for long average commute times and roadway congestion in the West End is the distribution of workplace locations for District 11 residents. As shown below, Miami, Tamiami, Doral, Coral Gables, Hialeah, and Fontainebleau are the top six destinations for worker commuter trips from the West End.

With less than 40,000 jobs within District 11, over 78% of workers who live in District 11 travel outside the District each day to go to work. The three major clusters for work trip destinations are shown below, represented as the three circles in the east, the northeast, and the southeast, which hold about 26%, 32%, and 16% of the total employment for District 11 workers, respectively. ***Overlaying these major destinations with the regional transportation networks indicate that SW 8th St. and SR 836 in the east-west direction, and the Turnpike and SW 137th Ave in the north-south direction are the most heavily loaded segments with the District's commute trips.***

[1] http://www.census.gov/acs/www/about_the_survey/american_community_survey/

DISTRICT 11 RESIDENCE-EMPLOYMENT MAP

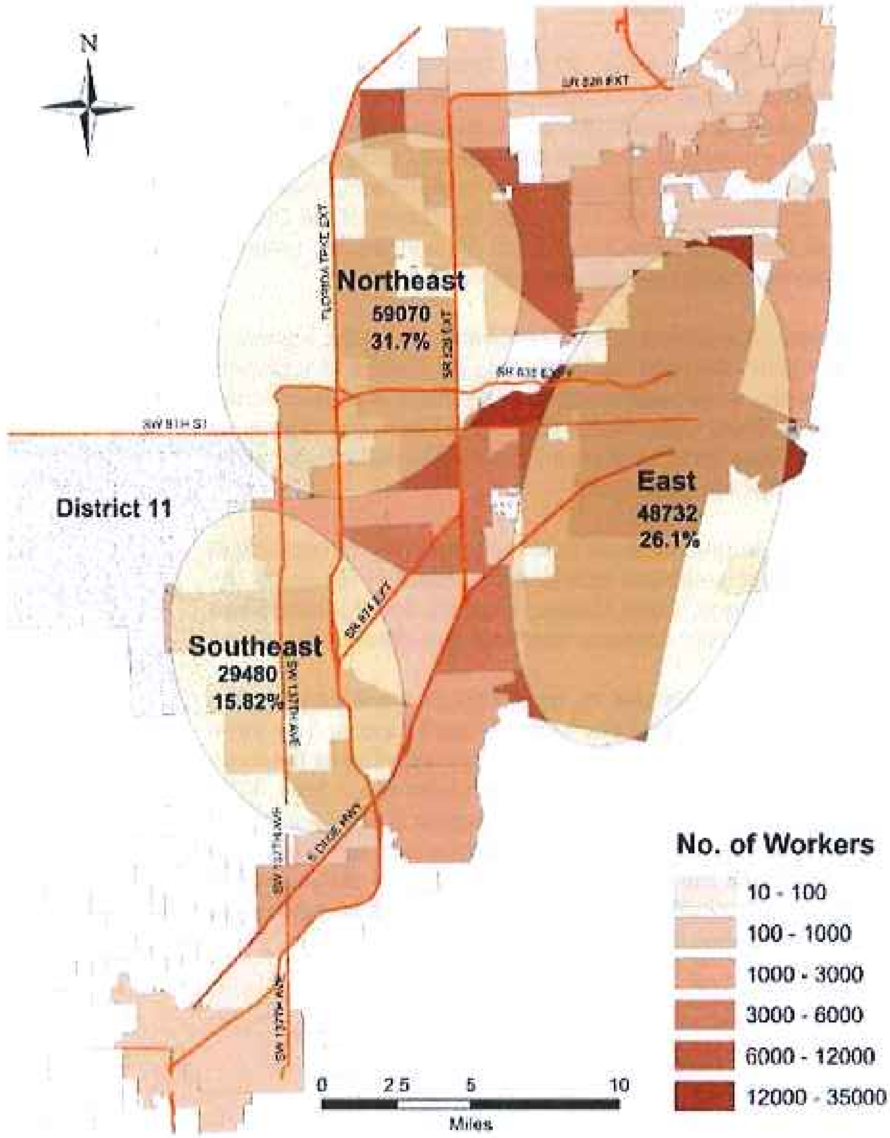
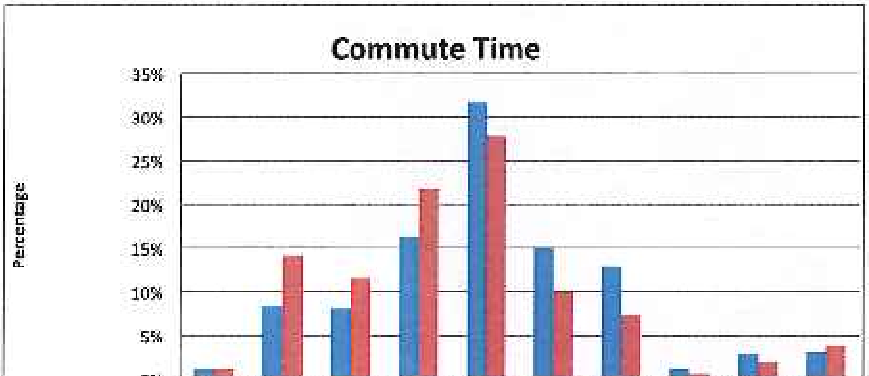


Figure 2. Workplace Clusters for District 11 Residents

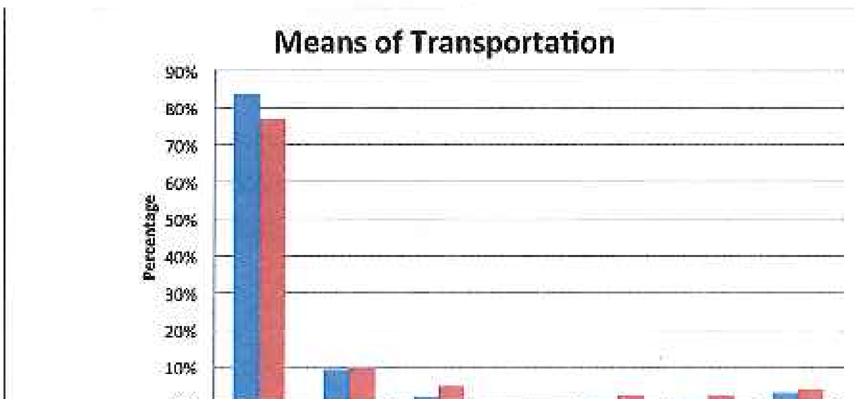
Figure 3 and Figure 4 present a comparison between the District's and the County's workers, in terms of travel time and travel mode for commute trips, respectively.

Figure 3 shows that in general, higher percentage of workers in the District bares higher commute times (30 minutes and higher) than the County as a whole. Almost 13% of the District's workers travels 60 to 74 minutes for work, as compared to about 7.34% workers in the County.



	Less than 5 minutes	5 to 14 minutes	15 to19 minutes	20 to 29 minutes	30 to 44 minutes	45 to 59 minutes	60 to 74 minutes	75 to 89 minutes	90 minutes or more	Worked at home
D11TravelTime	1.04%	8.26%	8.03%	16.33%	31.56%	14.89%	12.83%	1.07%	2.91%	3.07%
MDCTravelTime	1.10%	14.12%	11.54%	21.72%	27.81%	9.98%	7.34%	0.56%	2.06%	3.76%

Figure 3. Commute Time for District 11 and the Miami-Dade County Workers



	Drove alone	Carpool	Bus or trolley bus	Bicycle	Walked	Other method	Worked at home
D11 Transportation	83.51%	9.28%	2.02%	0.01%	0.80%	1.31%	3.06%
MDC Transportation	76.94%	9.51%	4.74%	0.45%	2.19%	2.43%	3.76%

Figure 4 Commute Mode for District 11 and the Miami-Dade County Workers

DISTRICT 11 to Cities HBWAuto OD Map

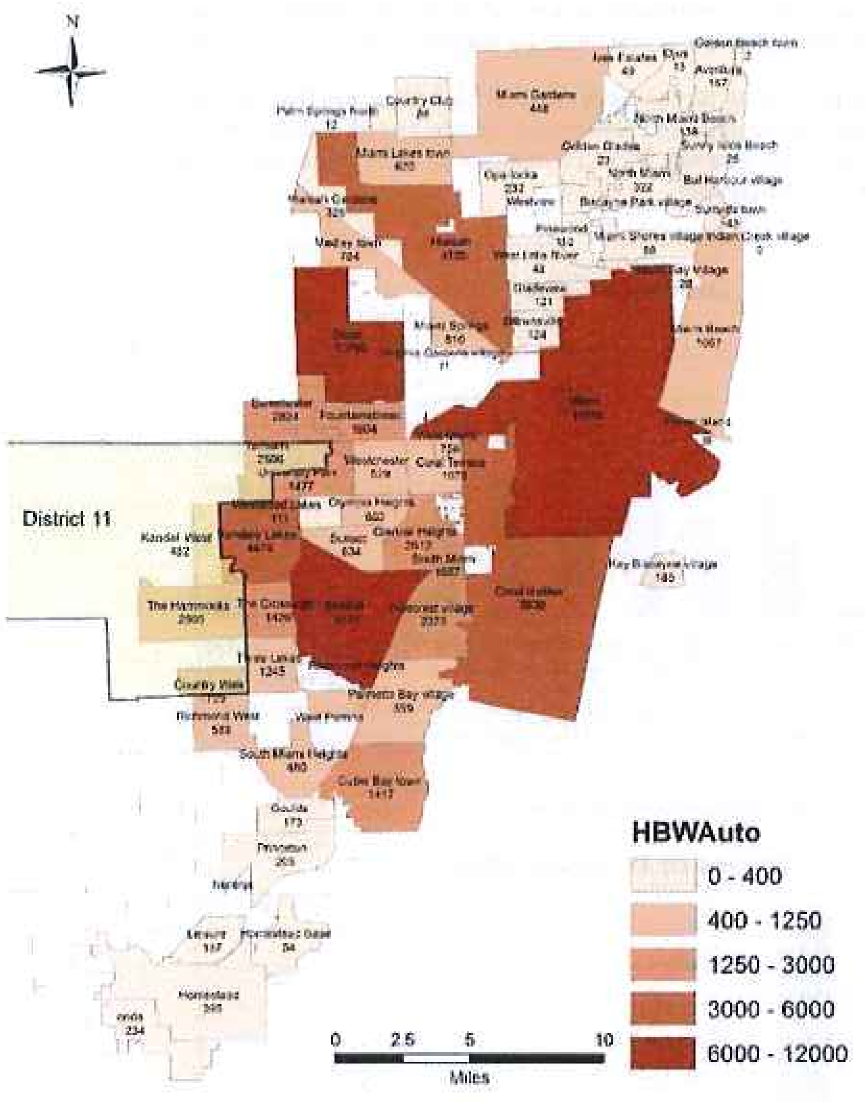
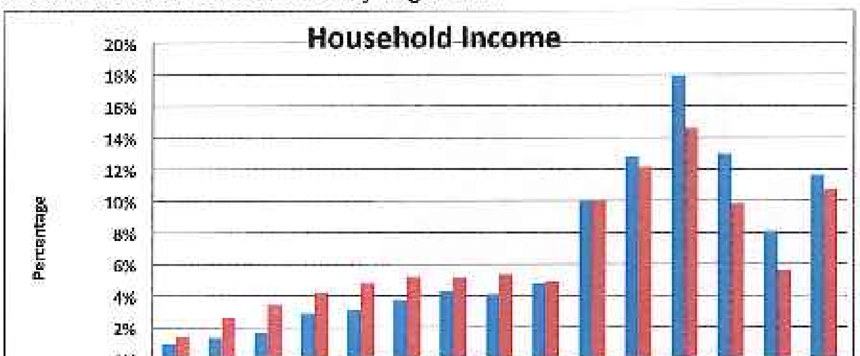


Figure 7 Home-Based Work Trip OD Pattern for District 11

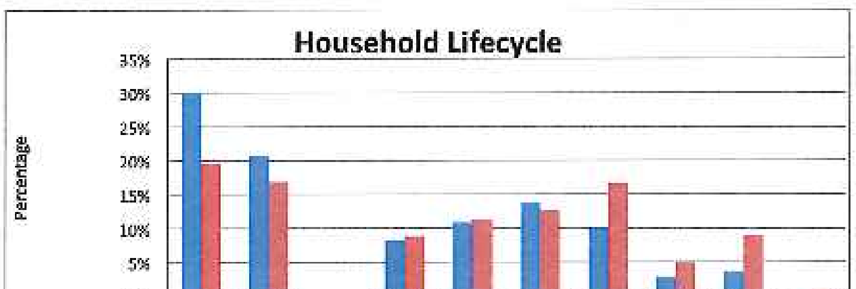
Figure 4 shows that less share of District 11 workers use alternative modes (bus, non-motorized modes, and other methods) for commute trips than the County in general. Which may indicate the lack of options of alternative modes for workers from the District.

Figure 5 and 6 present some key household characteristics, income and lifecycle, that are critical to the trip making behavior. Again, the charts show the comparison between the District and the County in general.



	Less than $9,999	$10,000-$14,999	$15,000-$19,999	$20,000-$24,999	$25,000-$29,999	$30,000-$34,999	$35,000-$39,999	$40,000-$44,999	$45,000-$49,999	$50,000-$59,999	$60,000-$74,999	$75,000-$99,999	$100,000-$124,999	$125,000-$149,999	$150,000 or more
D11Income	0.89%	1.34%	1.62%	2.90%	3.11%	3.73%	4.32%	4.09%	4.75%	9.99%	12.78%	17.83%	12.95%	8.09%	11.61%
MDCIncome	1.44%	2.59%	3.41%	4.23%	4.85%	5.21%	5.18%	5.35%	4.87%	10.00	12.11	14.63	9.80%	5.63%	10.71

Figure 5 Household Income for District 11 and the Miami-Dade County Residents



	Couple household With children under 18 years	Couple household no children under 18 years	Senior Couple household with children under 18	Senior Couple household no children under 18	Other family household: With children under 18 years	Other family household: No children under 18 years	Nonfamily household: Living alone	Nonfamily household: Not living alone	Nonfamily senior household : Living alone	Nonfamily senior household: Not living alone
D11 LifeCycle	30.04%	20.69%	0.16%	8.10%	10.85%	13.64%	9.92%	2.76%	3.59%	0.25%
MDC LifeCycle	19.53%	16.82%	0.13%	8.83%	11.26%	12.52%	16.54%	4.80%	8.89%	0.66%

Figure 6 Household Lifecycle for District 11 and the Miami-Dade County Residents

DISTRICT 11 to Cities HBWAuto OD Map

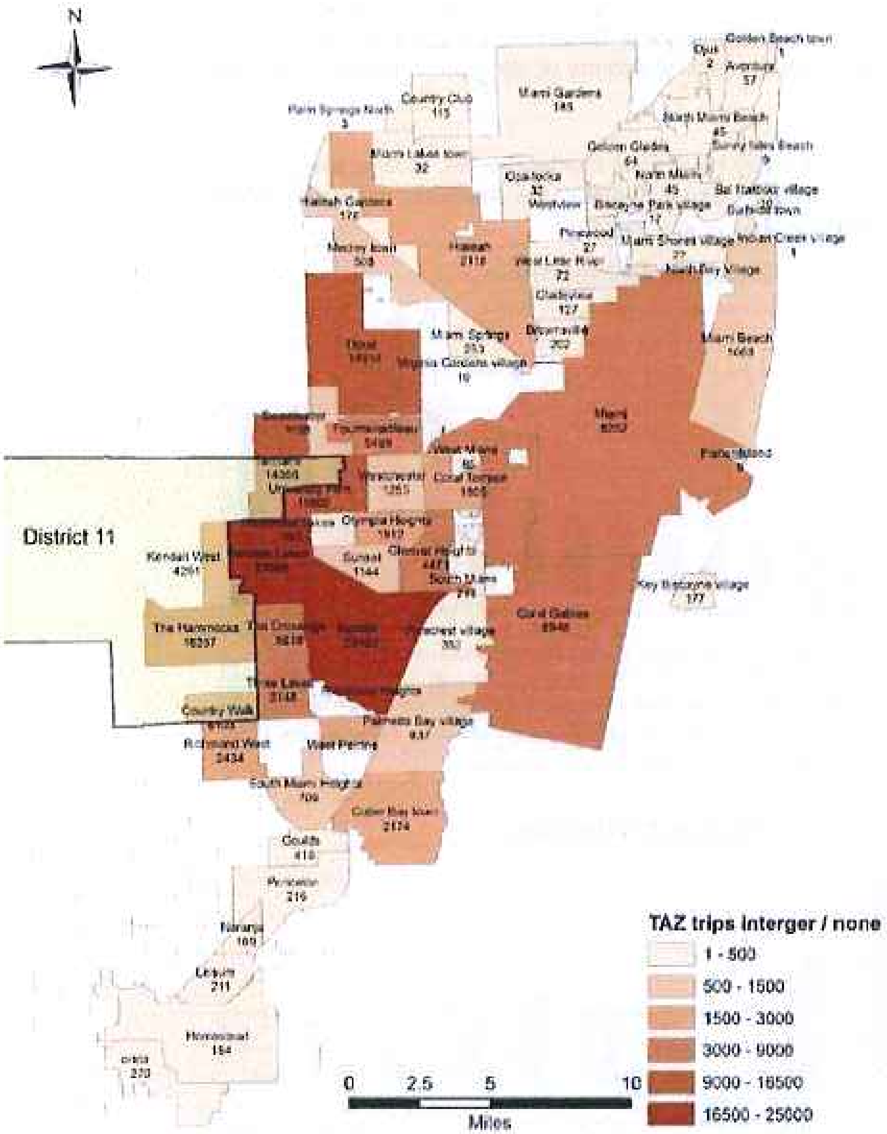


Figure 8 Home-Based Other Trip OD Pattern for District 11

Origin-Destination Pattern and Network Distribution

Income and lifecycle are also critical to trip making behavior. Again, the charts show the comparison between the West End and the County in general. The West End has higher shares of high-income households ($60,000 or above) in comparison with the County as a whole. Higher household income usually indicates higher trip rates.

In general, the West End has a much higher share of couple households (with or without children under 18 years) than the rest of the County. This is consistent with the West End 's high-income levels compared with the County.

Based on SERPM model outputs for year 2010, the figures below show the travel destination pattern for trips originated from West End, for three trip purposes:

- Home-based work (HBW) trips – the trips from home to work or work-related activities;
- Home-based other (HBO) trips – all other trips from home that are not work-related, such as school trips, grocery shopping, and other maintenance activities; and
- Non-home-based trips (NHB) – all trips that do not start or end at home, such as going out for lunch at work, social and recreation trips leaving or ending at non-home locations.

The analysis is for auto trips only, as auto trips represent the vast majority of all trips produced by the District. Consistent with the workplace location map derived from ACS data, Miami, Doral, Coral Gables, and Hialeah are the top destinations for Home Based Work trips. However, Kendall appears to be a top destination for work trips based on the model outputs, which deserves further investigation.

The OD pattern for Home Based Other auto trips indicates that for non-work related purposes, residents in the District tend to stay in the surrounding area, such as Kendall, Kendal Lakes, Doral, Tamiami, the Hammocks, etc.

The OD pattern for Non-Home-Based auto trips shows a similar pattern as the HBO trips, where people tend to find destination points within or close to the District.

Accordingly, the network loading for trips originating from the West End, for the AM peak period (7:00 – 10:00 am), and PM peak period (4:00 – 8:00 pm) show several hot spots for the morning commute from West End — one on the Turnpike and the Dolphin Expressway around SW 8th St., another around SW 88th St., and SW 137th Ave. Evening peak period travel to West End shows less intensity than morning travel. It also exhibits somewhat different pattern, with the heaviest loading at SW 88th St., and SW 137th Ave. The figures (left) show the Trip Destination model results.

DISTRICT 11 to Cities NHBWAuto OD Map

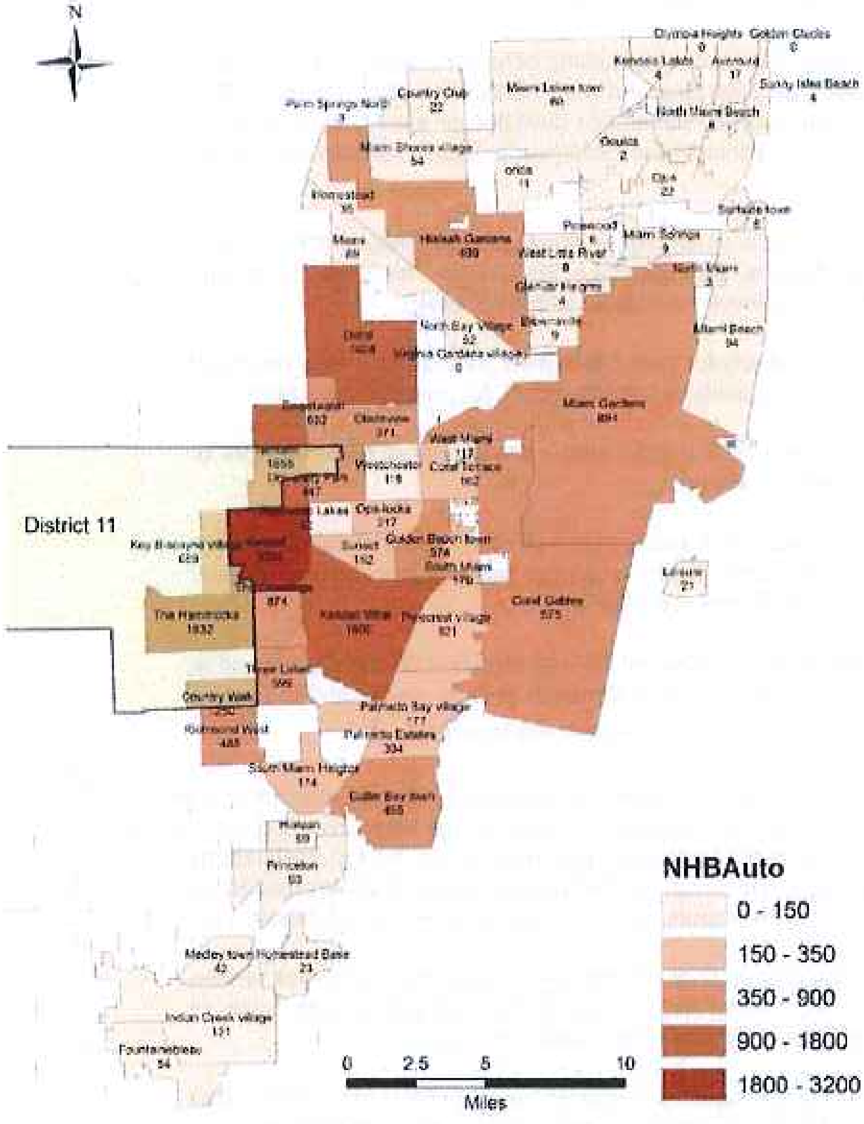


Figure 8 Home-Based Other Trip OD Pattern for District 11

Figure 5 shows that the District has higher shares of high-income households ($60K or above) in comparison with the County as a whole. Higher household income usually indicates higher trip rates.

Figure 6 shows the household lifecycle for District 11's population and the County population as a whole. In general, the District holds much higher share of coupled households (with or without children under 18 years) than the rest of the County. This is consistent with the District's high income levels compared with the County.

Figure 7 presents the OD pattern for HBW auto trips. Consistent with the workplace location map derived from ACS data shown in Figure 1, Miami, Doral, Coral Gables, Hialeah are the top destinations for work trips. However, Kendall appears to be a top destination for work trips based on the model outputs, which deserves further investigation.

Figure 8 presents the OD pattern for HBO auto trips. It indicates that for non-work related purposes, residents in the District tend to stay in the surrounding area, such as Kendall, Kendal Lakes, Doral, Tamiami, the Hammocks, etc.

Figure 9 presents the OD pattern for NHB auto trips. It shows a similar pattern as the HBO trips, where people tend to find destination points within or close to the District.

Accordingly, Figure 10 and 11 presents the network loading for trips originated from District 11, for AM peak period (7:00 – 10:00 am), and PM peak period (4:00 – 8:00 pm) respectively. As shown in Figure 10, several hot spots for morning commute from District 11 can be observed, one on the Turnpike and the Dolphin Expressway around SW 8th St., another around SW 88th st., and SW 137th Ave. Evening peak period travel to District 11 shows less intensity than morning travel, as shown in Figure 11. It also exhibits somewhat different pattern, with the heaviest loading concentrates around SW 88th st., and SW 137th Ave.

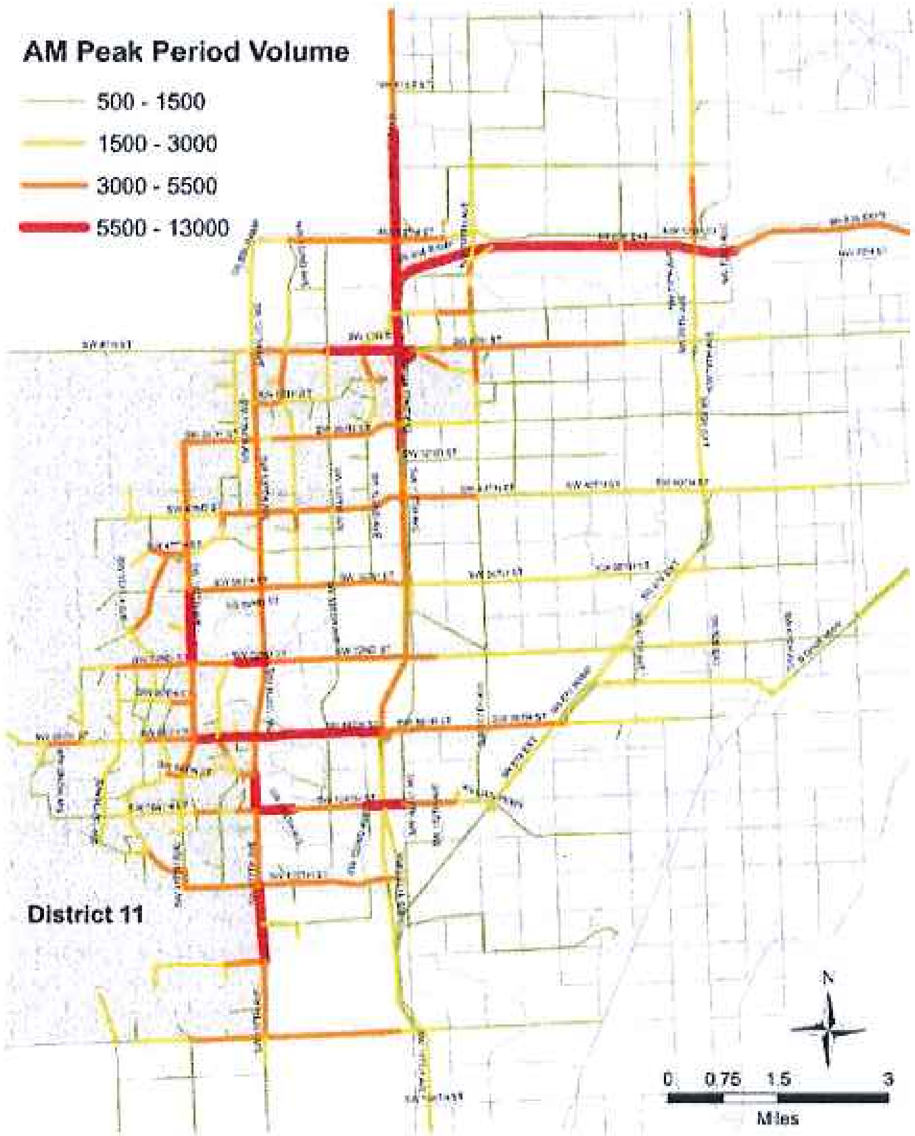


Figure 10 AM Peak Period Volume Originated from District 11

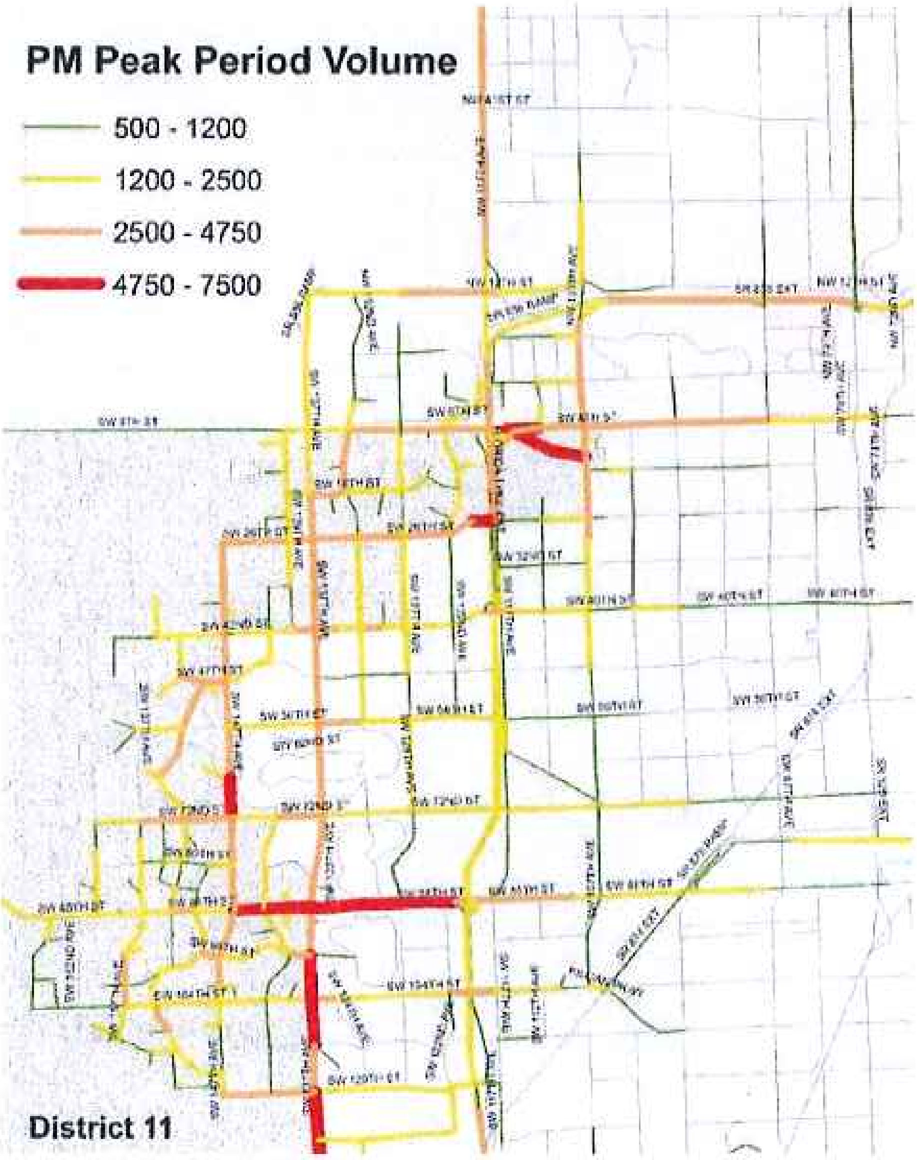
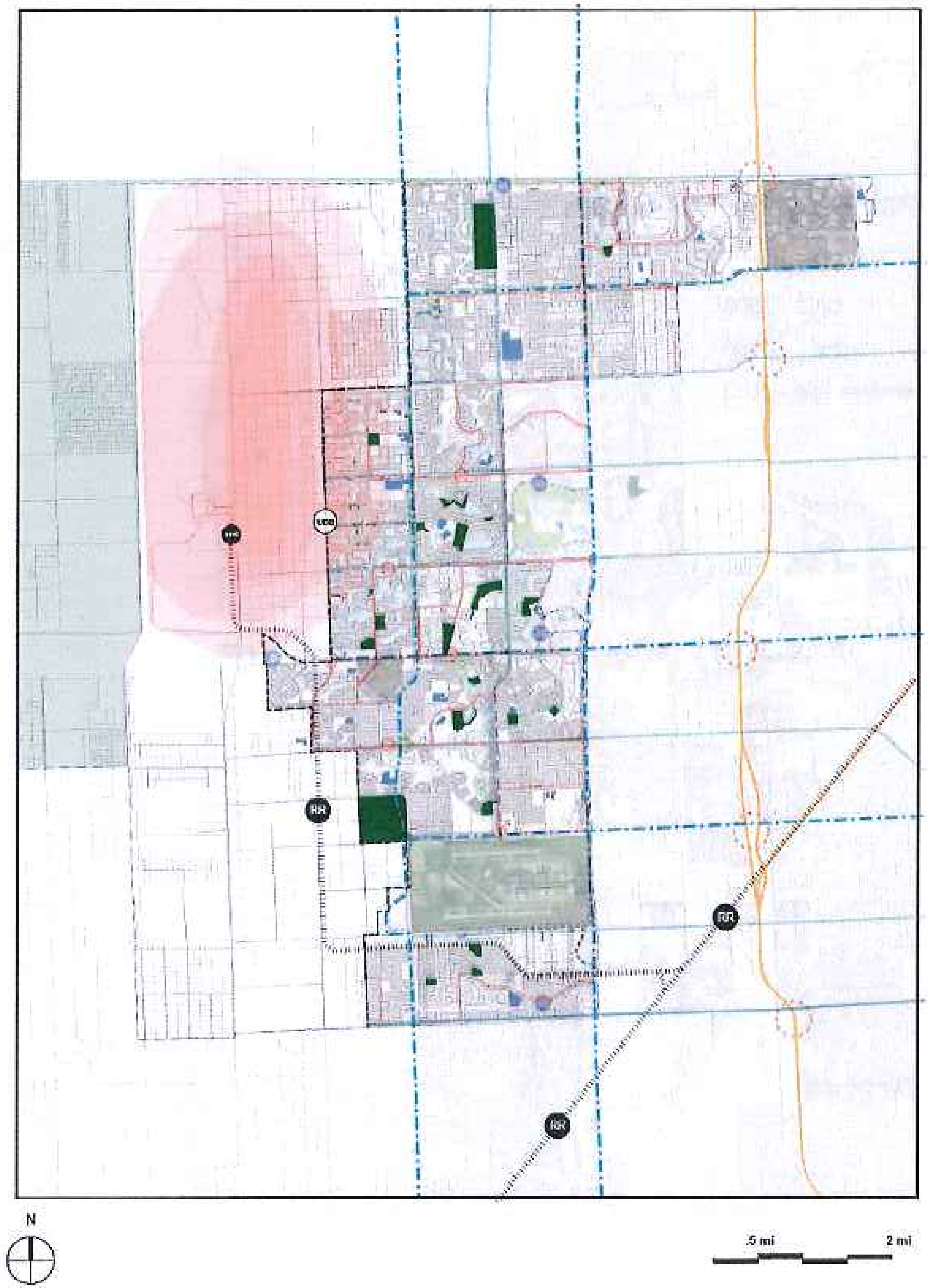


Figure 11 PM Peak Period Volume Originated from District 11

SCHOOLS + GREENSPACES + WATER



ENVIRONMENT and GREENSPACE

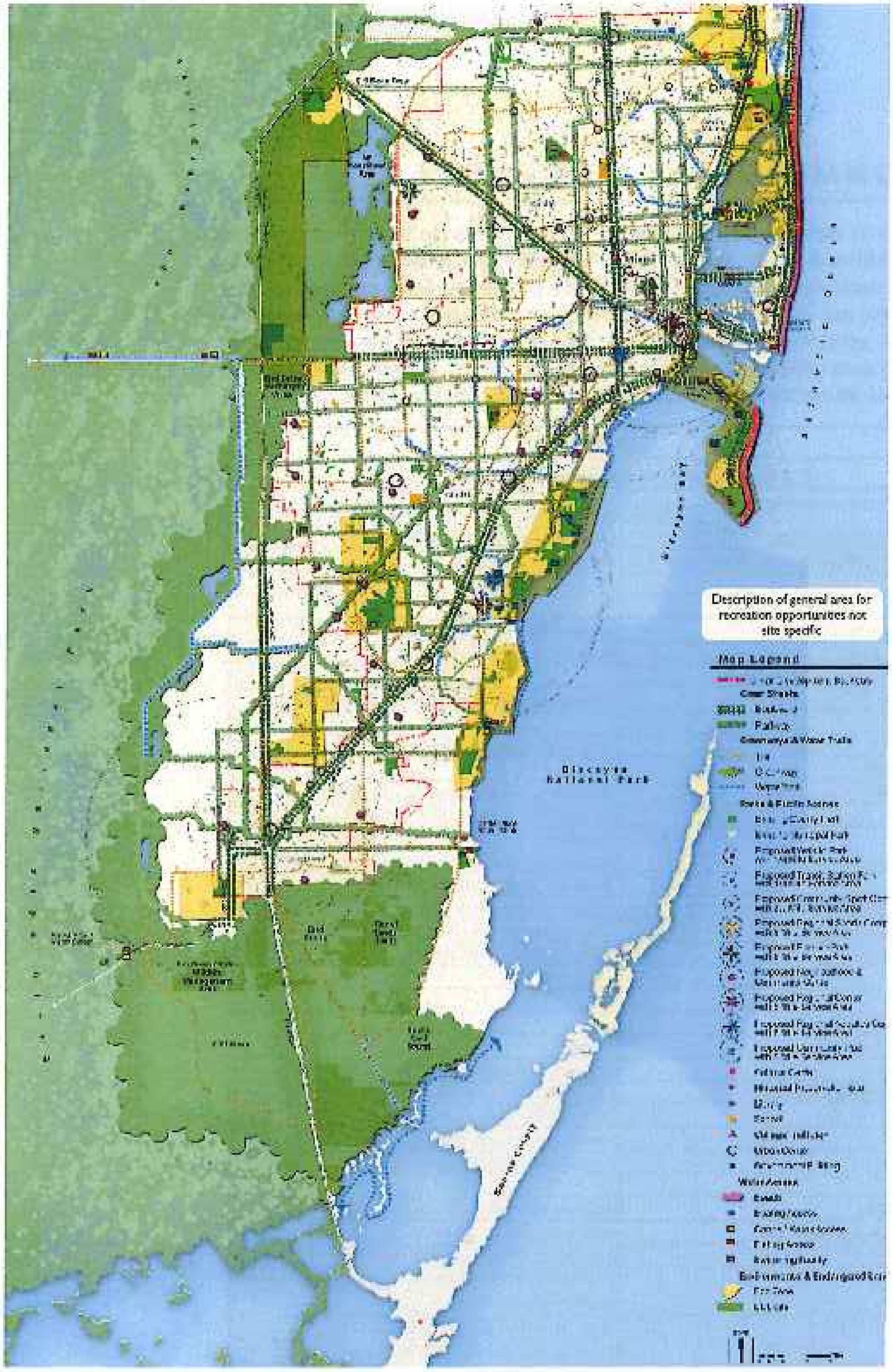
District 11 includes over 29 County Parks in addition to 12-15 parks in close proximity in Districts 8, 9, 10, and 12. Trail Glades Range County Park (District 12) is a large park dedicated to shooting sports and a popular regional destination. The majority of parks are co-located with a public or private school from pre-school to the senior high school level (See Table 1). This is an important community asset as the District could use these adjacencies to build a strong community identity for each major area identified as the North, Central and South West End.

TABLE 1

Partial List of County Parks in District 11

	North West End	
1	Tree Island Park and Preserve	Close to Zelda Glazer Elem School
2	Tamiami Parks Stadium/ Old Fair Grounds****	Adjacent to FIU
		FIU Baseball Stadium
		FIU Preserve
3	International Gardens Park	Adjacent to Wesley Matthews Elem School
4	Tamiami Lakes Park	Adjacent to Joe Hall Elem School
5	Bird Basin Park	
6	Bird Lakes Park	Adjacent to Ethel Koger Beckam Elem School
7	Bent Tree Park	
8	Royal Green park	Close to Greenglade Elem School
9	Millers Pond Park	
19	Edens Lake Park	Adjacent to Lamar Louise Curry Middle School
		Dr. Maneul C. Barriera Elem School
	Central West End	
11	Westwind Lakes Park	Adjacent to Bowman Foster Ashe Elem School
		Howard A. Doolin Middle School
12	West Kendall Lakes Park	Adjacent to Kendal Lakes Country Club Golfcourse
13	Kendall Lakes Park	Adjacent to Kendal Lakes Elem School
14	Kendall Green Park	Adjacent to Kings Meadow Day School
15	Sun Lake Park	
16	Lago Mar Park	
17	Olympic Park	
18	Kings Meadow Park	
19	Sugarwood Park	Adjacent to Claude Pepper Elem School
20	*Hammocks Community Park**	Adjacent to West Kendall Regional Library
		Close to Felix Varela Senior High School
		Close to Hammocks Middle School
		Adjacent to Kendall Ice Arena
21	Wild Lime Park	
22	Forest Lakes Park	Adjacent to Christina M. Eve Elem School
23	Calusa Club Estates (District 10)	Adjacent to Calusa Elem School
24	*Water Oaks Park****	Adjacent to Oliver Hoover Elem School
		Potential location for Kendall Town Center/Howard Hughes Property
		Close to Kendall Lakes Branch Library
		Close to West Kendall Baptist Hospital
		Close to CBT College - West Kendall Campus
		Close to Felix Verla Senior High School
		Close to Temple Samuel or Olom Preschool

MIAMI-DADE PARKS MASTER PLAN



	Miami Baptist Church
	Close to Templo El Rey Jesus
South West End	
25 *Boystown Pineland County Park***	Adjacent to Crossing County Club Golfcourse
	Our Lady of Lourdes Parish School
	Our Lady of Lourdes Catholic Church
	Camp Matecumbe Park
26 Camp Matecumbe Park	
27 Sandpiper Park	
28 Arvida Park	
29 West Kendall District Park	
30 Tamiami Pinelands Park (District 8)	Large park adjacent to current Industrial Area
31 Three Lakes Park (District 8)	
32 Big and Little George Hammocks County Park	
33 Oak Creek Park	Extreme Body Fitness Bootcamp
34 Kings Grant Park (District 9)	

NOTE: Proximity is described as "close to" when popertles are within 3-4 block area. Use of term "adjacent to" indicates immediate proximity.

* The central location of and adjacency of these greenspaces make this a potential site for a Healthy West Kendall Central West End Community platform.

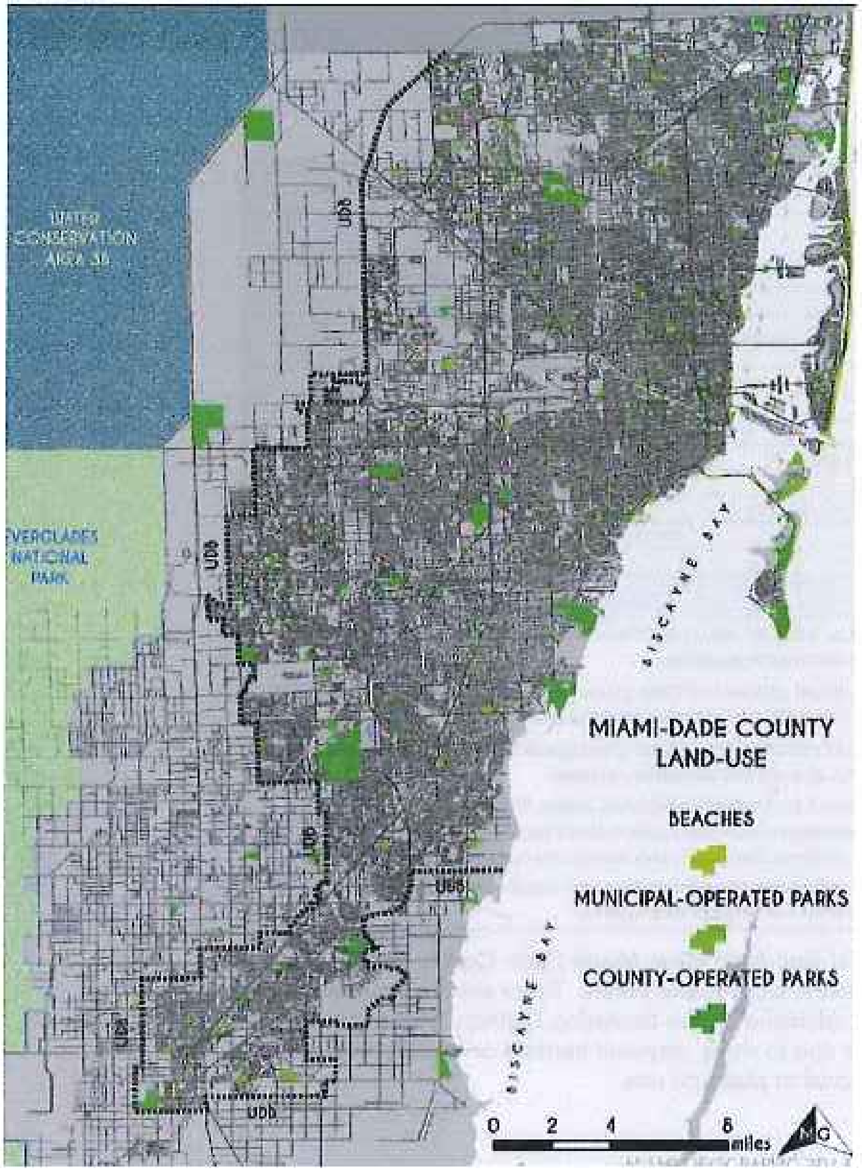
**The central location of and adjacency of these greenspaces make this a potential site for a Healthy West Kendal South West End Community platform.

*** Properties are adcanet but barriers do not allow access. The central location of and adjacency of these greenspaces make this a potential site for a Healthy West Kendall Central West End Community platform. This park is also close to the Hammock Community Park

****Tamiami Fair Grounds will be moved, but the campus parks and amenities would be possible site for North West End community programs.

Unique to the West End from other Miami-Dade County unincorporated areas are the number of lakes, canals, and ponds. There are over 129 bodies of water in the area with 30 additional in the bordering Districts. However, there is often limited public access due to walls, physical barriers or canals. These make access difficult for recreational or pleasure use.

MIAMI-DADE COUNTY LAND-USE
BEACHES, MUNICIPAL PARKS, AND COUNTY PARKS



Key Environment and Greenspace Characteristics

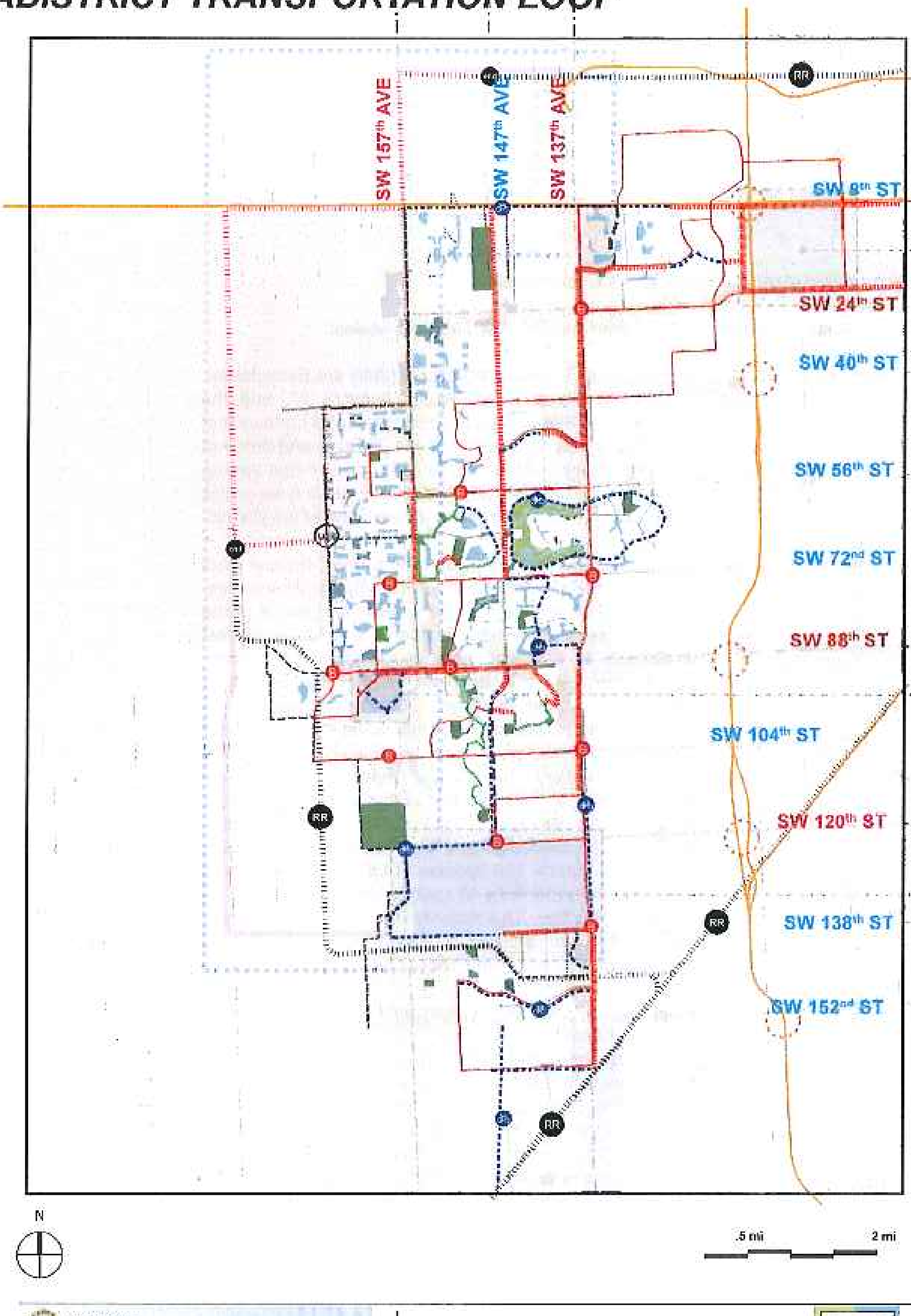
Community Greenspaces and Parks are discussed at three scales:

- <u>*National Significance:*</u> The most significant parks are **Everglades National Park**, southwest along Krome Ave./US 27, and the government managed **Water Conservation Area 3B** northwest at Krome Ave./US 27 covering land in both Miami-Dade and Broward County. **The Big Cypress Swamp**, 729,000 acres of vast swamp runs contiguous to the **Everglades National Wildlife Area** and is accessible via US 41 that runs at the northern edge of the District.

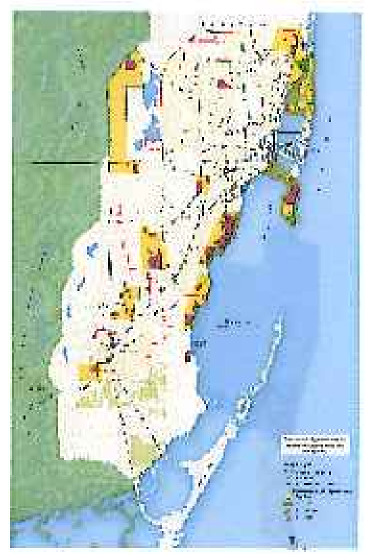
    - Everglades National Park (ENP) is a U.S. National Park protecting the southern 20% of the original Everglades. Over 1 million people visit the park each year. It is the largest tropical wilderness in the U.S. and the largest wilderness of any kind east of the Mississippi River. World wide it was declared an International Biosphere Reserve, a World Heritage Site and a Wetland of International Importance. The Park is the most significant breeding ground for tropical wading birds in North America, contains the largest mangrove ecosystem in the western hemisphere and is home to 36 threatened or protected species including the Florida panther, the American crocodile, and the West Indian Manatee. The park supports 350 species of birds, 300 species of fresh and saltwater fish, 40 species of mammals, and 50 species of reptiles. The majority of South Florida's fresh water, which is stored in the Biscayne Aquifer, is recharged in the park. See Water Quality Maps at right.

    - Adjacenct to this asset, enhancement of current county parks and development of new bike, hiking, and walking trails, throughout the West End is of potentially significant importance to the identity of the area as a site of agro-tourism and outdoor sporting training facilities. Agro-tourism is a niche tourism considered a growth industry in many parts of the United States and abroad. It includes activities such as farm stands, picking fruit, feeding animals or staying at a farm B & B.[i] Following on the model of the County Parks & Recreation "Bike 305", Residents could use online maps or apps to identify bike and walking paths throughout the West End.

INTRADISTRICT TRANSPORTATION LOOP

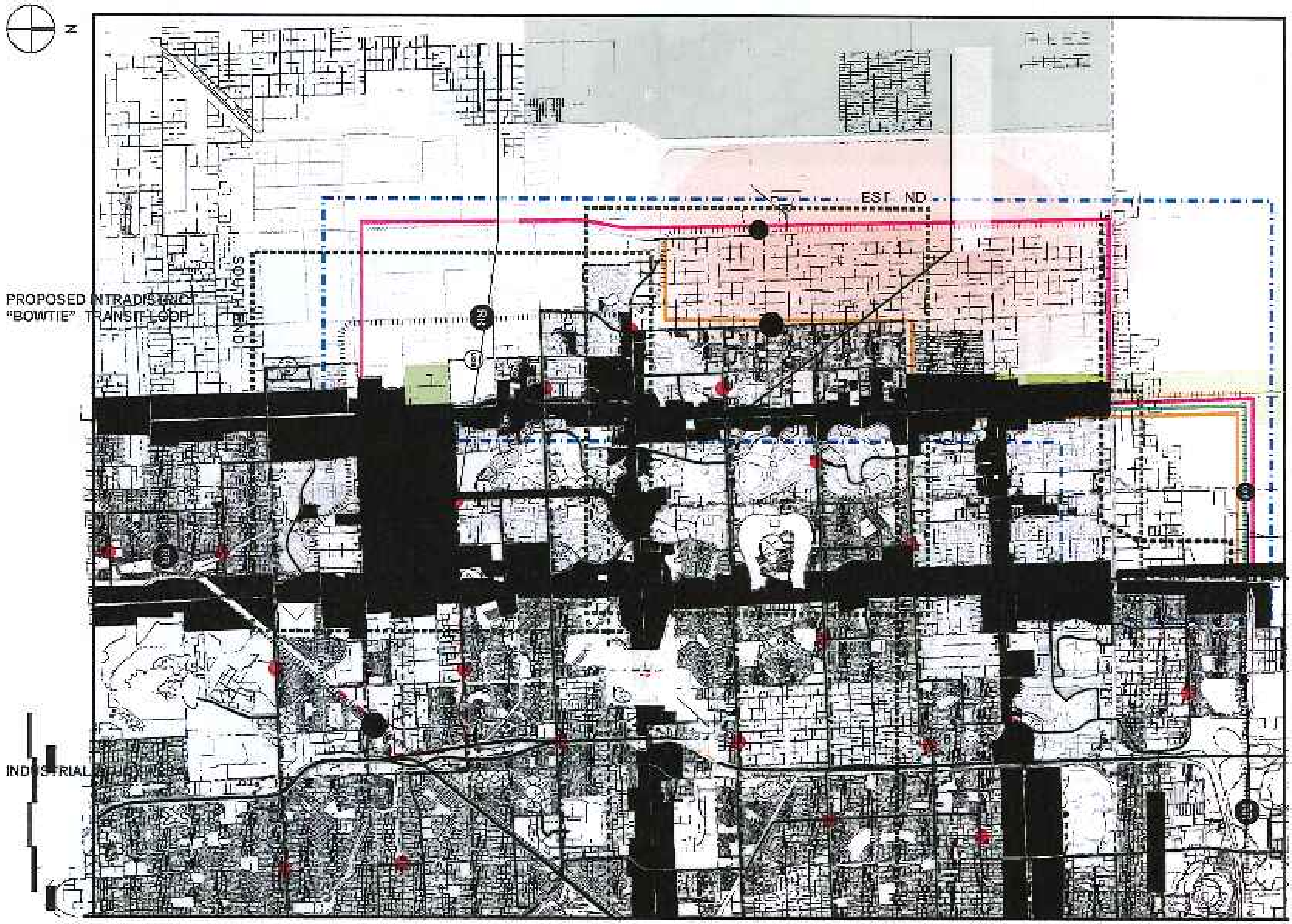


- *Regional Significance:* **Trail Glades Range County Park** (District 12) is a large park dedicated to shooting sports and a popular regional destination. The West End is in the designated MDOSMP (Miami-Dade Open Space Master Plan) Greenbelt and NE Transitional Area. This offers unique opportunities for the District to set a high standard of managed development balancing the needs for growth, open space and water conservation. Our analysis of the impact of sea level rise on the District indicates that at NOAA projected rates the existing topography will leave select areas above the 1.3' SLR water line until 2060.[ii]



[i] Michelle Nowak. "The Farm Stay Project". Farmstays.blogspot.com. Retrieved 2012-04-04.
[ii] Based on current NOAA predictions for sea level rise and coastal flooding impacts. Data is available through the NOAA CSC Sea Level Rise Inundation and the USACE National Levee Database. See also the Intergovernmental Panel on Climate Change (IPCC) report: http://www.ipcc.ch/publications_and_data/ar4/wg1/en/ch10.html.

MAJOR CORRIDORS



- *Community Significance:* There are a significant number of co-located activities and community programs that exist currently. These programs could be significantly augmented by the addition of cafés, restaurants, sports activities and general entertainment within walking distance. Three important areas are outlined below:
  1. **Hammocks Community Park**: Adjacent and central to a number of public schools (Felix Varela Senior High School, Hammocks Middle School) and the Kendall Ice Arena. This is one of the larger community parks with multiple outdoor activities. A "necklace" of creating connectivity between this park and **Water Oaks Park** would create a density of healthy community activities in the Central West End.[iii]

  2. **Water Oaks Park**: Close proximity to 3 schools, a library, (West Kendall Public Library), the West Kendall Baptist Hospital, and 2 houses of worship, physical connection and access needs to be developed to encourage the creation of a "necklace" of activities for the Central West End area.

  3. **Boystown Pineland County Park**: This park is adjacent to a golf course and hosts Camp Matecumbe. The Camp currently provides after school sessions where children can participate in various physical fitness, literacy, art and music activities.

Greenspace as Community Connector

Our analysis of current roadways and greenspaces including bike paths, trails and lakes indicates that the key areas of focus are:

1) Landscape plantings, including the visual unity of each sub-area in the West End (North, Central, and South West End)

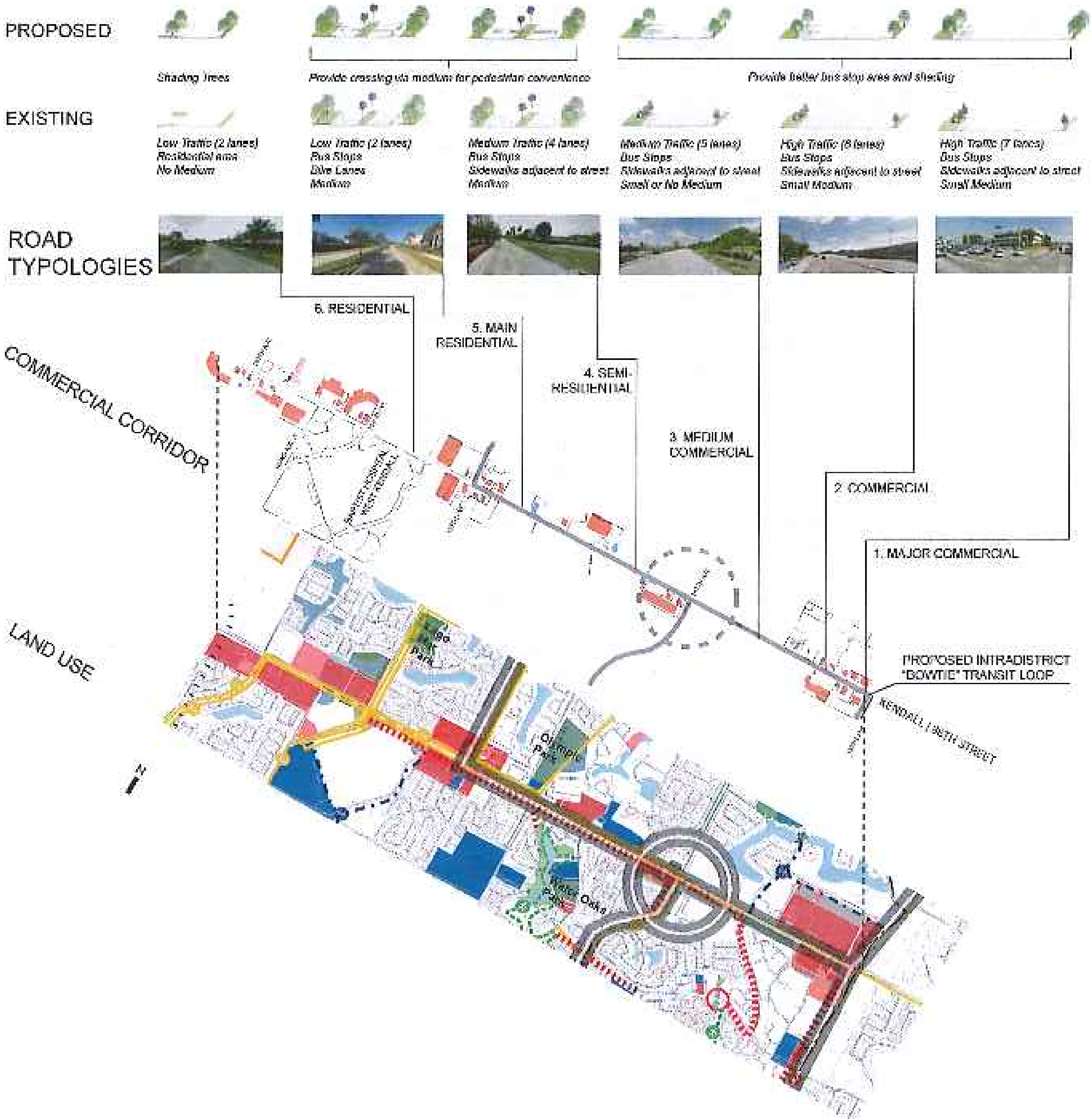
2) Improvements in roadway landscaping and the location of future sidewalks, boulevards, and

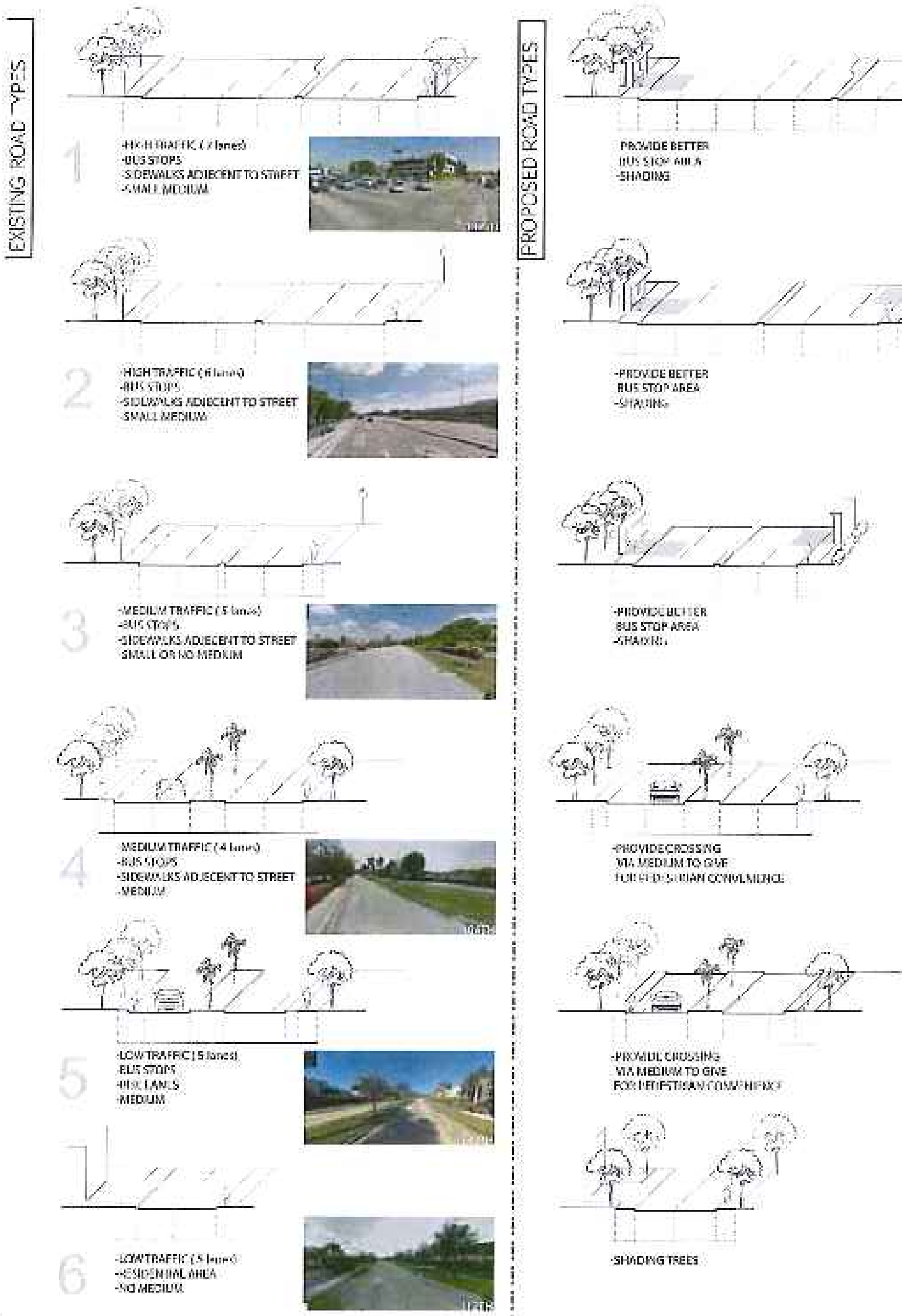
3) Coordinated transfer between modes of public transportation, walking, and biking.

Additionally there are two major Institutions, **FIU** and **West Kendall Baptist Hospital** that should be considered the locus for community outreach efforts in health, education, programs for elder citizens, and site of general community information and activities.

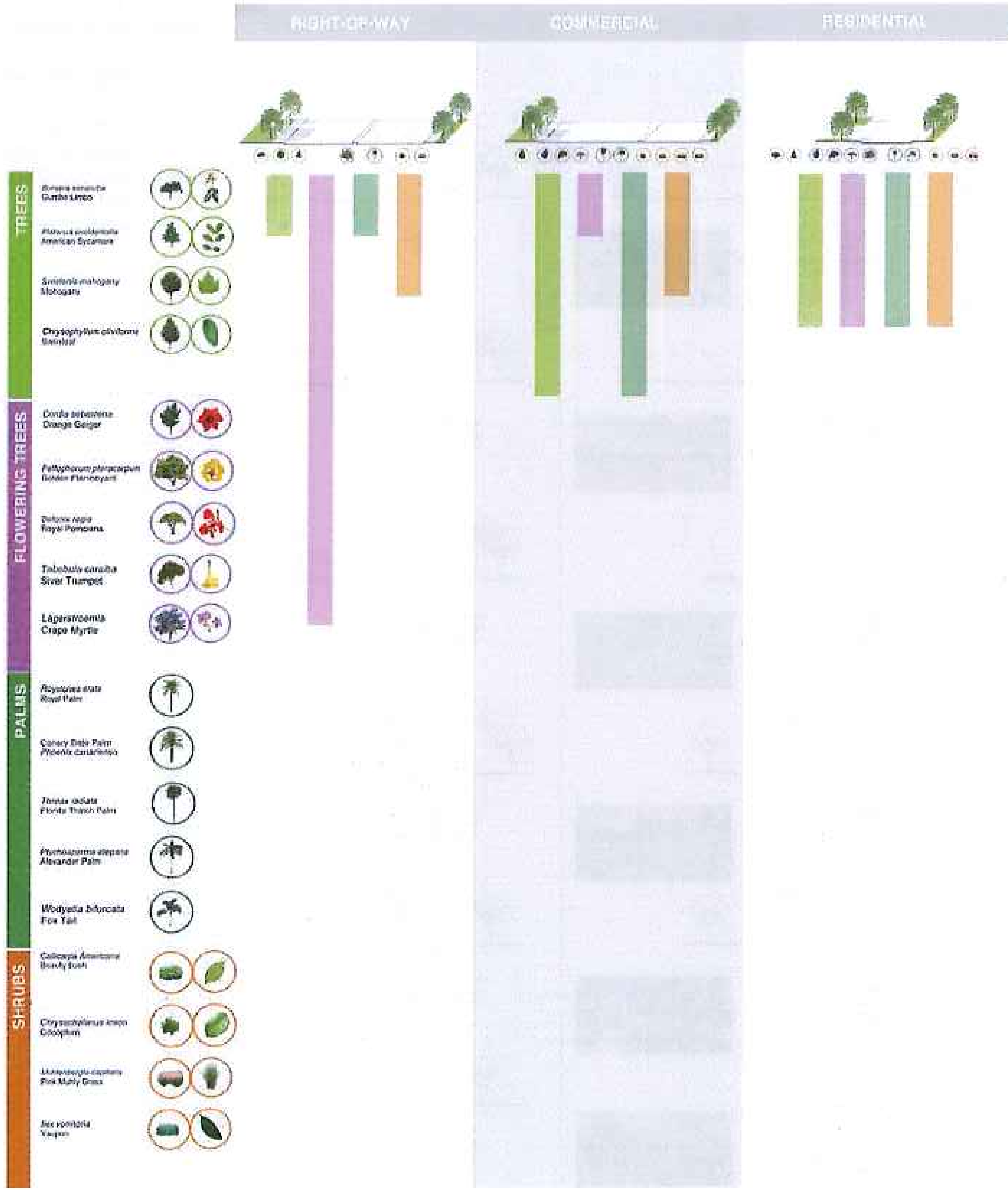
[iii] January 2014 Miami-Dade Parks budgeting revealed $105 million in unfunded projects with $11.8 million unexpended for the long-awaited District Park in West Kendall. It is unclear when or if this project will move forward.

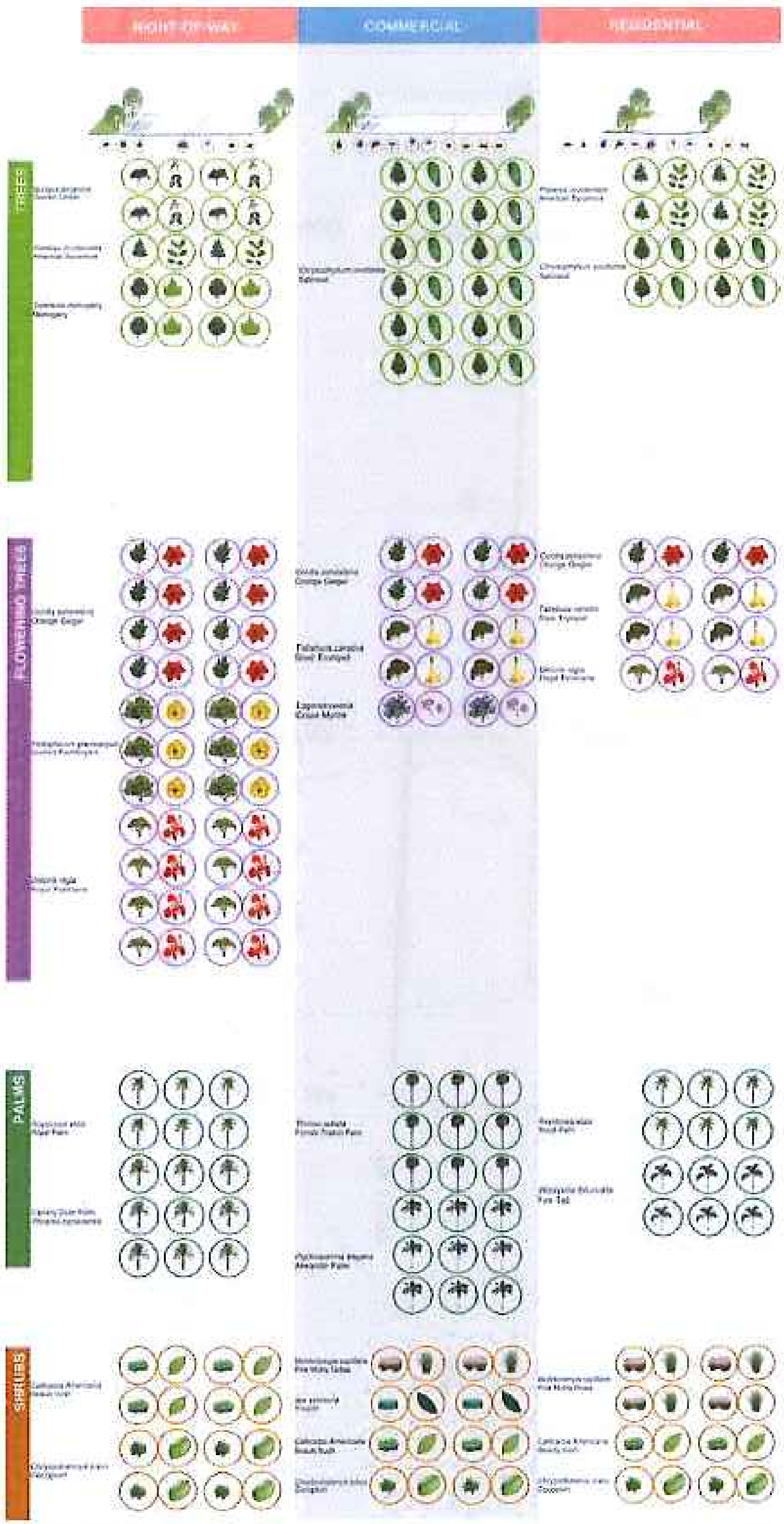
KENDALL CORRIDOR



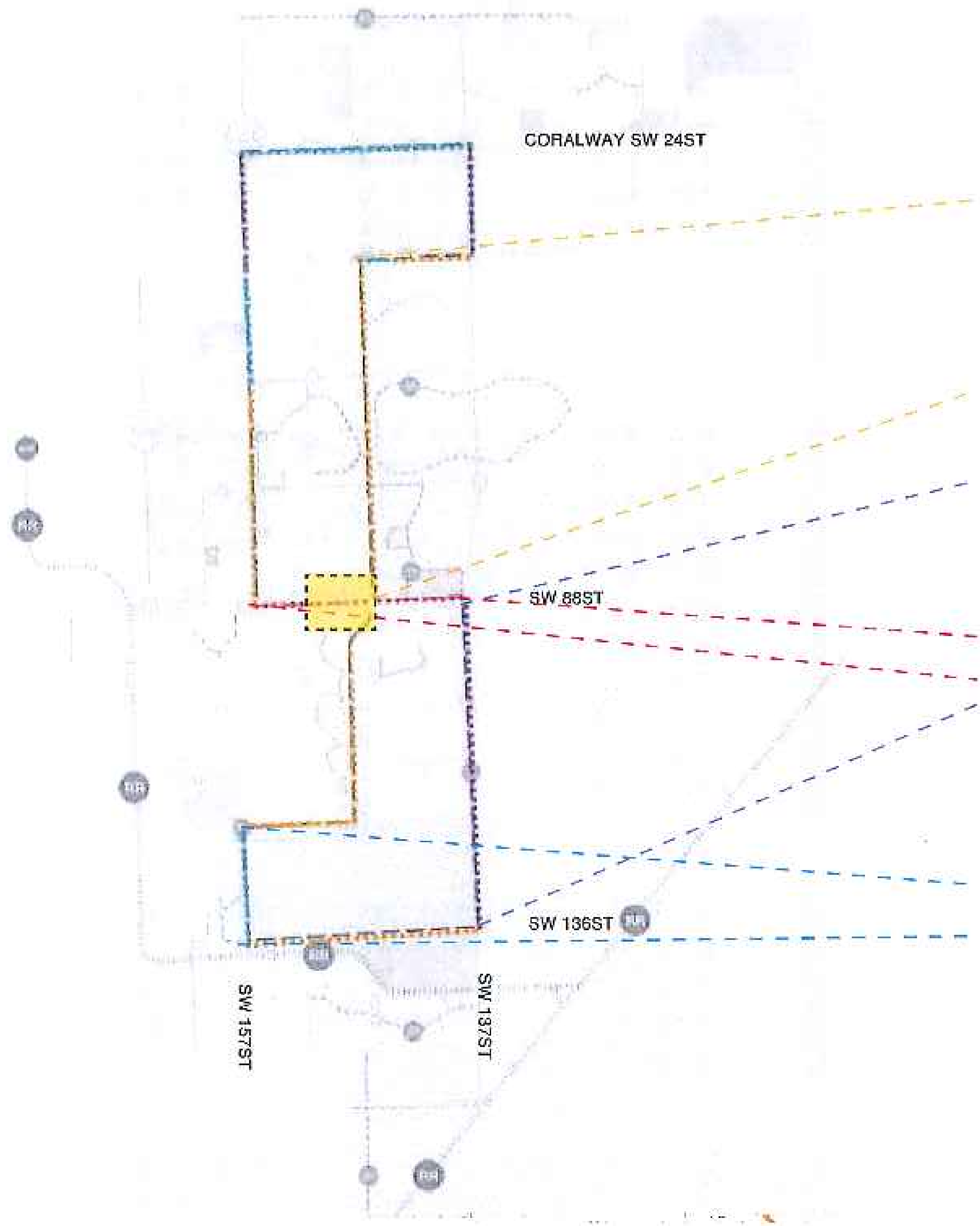

EXISTING ROAD TYPES
PROPOSED ROAD TYPES
1
-HIGH TRAFFIC (7 lanes)
-BUS STOPS
-SIDEWALKS ADJECENT TO STREET
-SMALL MEDIUM
PROVIDE BETTER
BUS STOP AREA
-SHADING
2
-HIGH TRAFFIC (6 lanes)
-BUS STOPS
-SIDEWALKS ADJECENT TO STREET
-SMALL MEDIUM
-PROVIDE BETTER
BUS STOP AREA
-SHADING
3
-MEDIUM TRAFFIC (5 lanes)
-BUS STOPS
-SIDEWALKS ADJECENT TO STREET
-SMALL OR NO MEDKIM
-PROVIDE BETTER
BUS STOP AREA
-SHADING
4
-MEDIUM TRAFFIC (4 lanes)
-BUS STOPS
-SIDEWALKS ADJECENT TO STREET
-MEDIUM
-PROVIDE CROSSING
VIA MEDIUM TO GIVE
FOR PEDESTRIAN CONVENIENCE
5
-LOW TRAFFIC (5 lanes)
-BUS STOPS
-BIKE LANES
-MEDIUM
-PROVIDE CROSSING
VIA MEDIUM TO GIVE
FOR PEDESTRIAN CONVENIENCE
6
-LOW TRAFFIC
-RESIDENTIAL AREA
-NO MEDIUM
-SHADING TREES

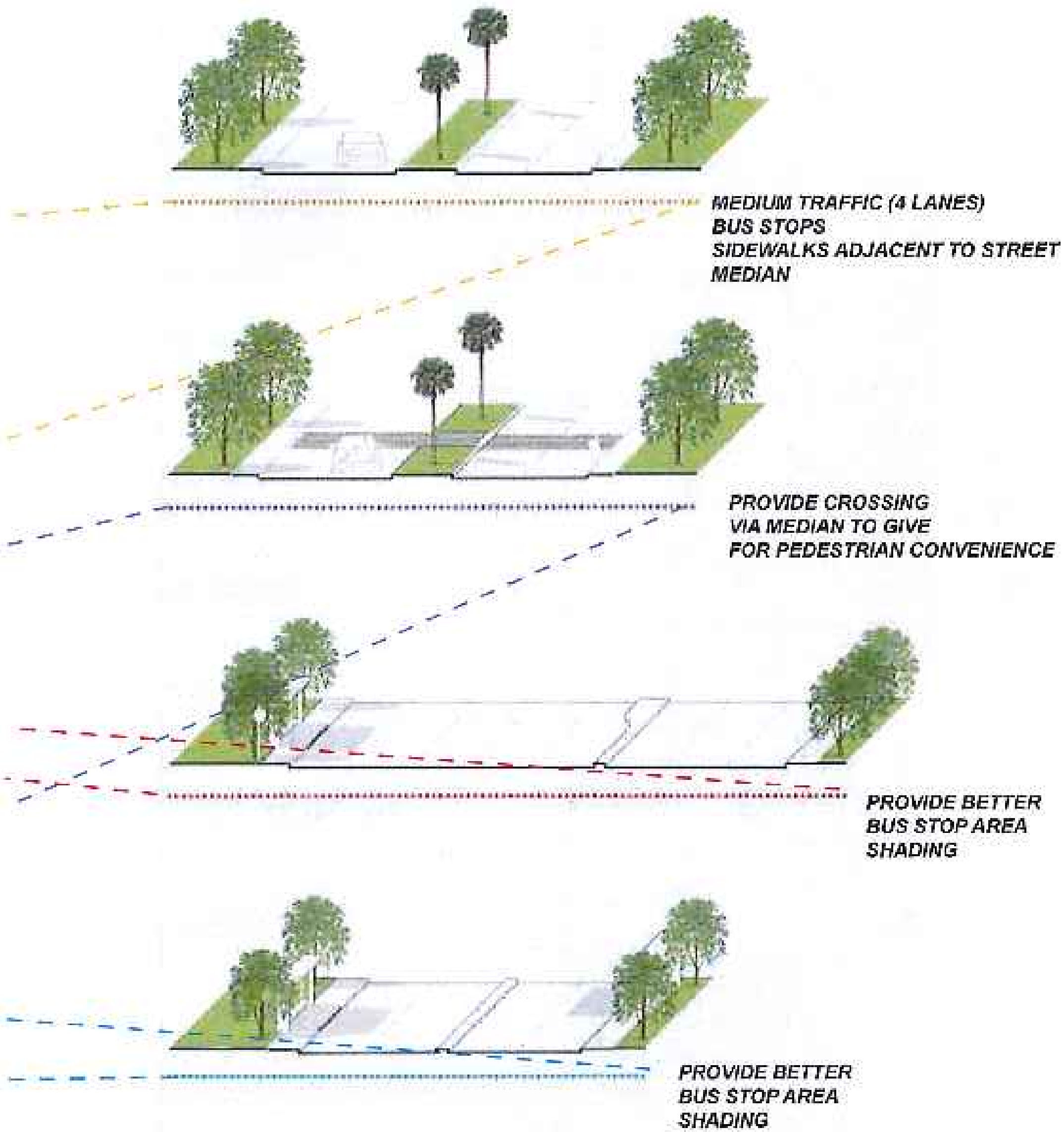
WEST END PROPOSED PLANT ATLAS



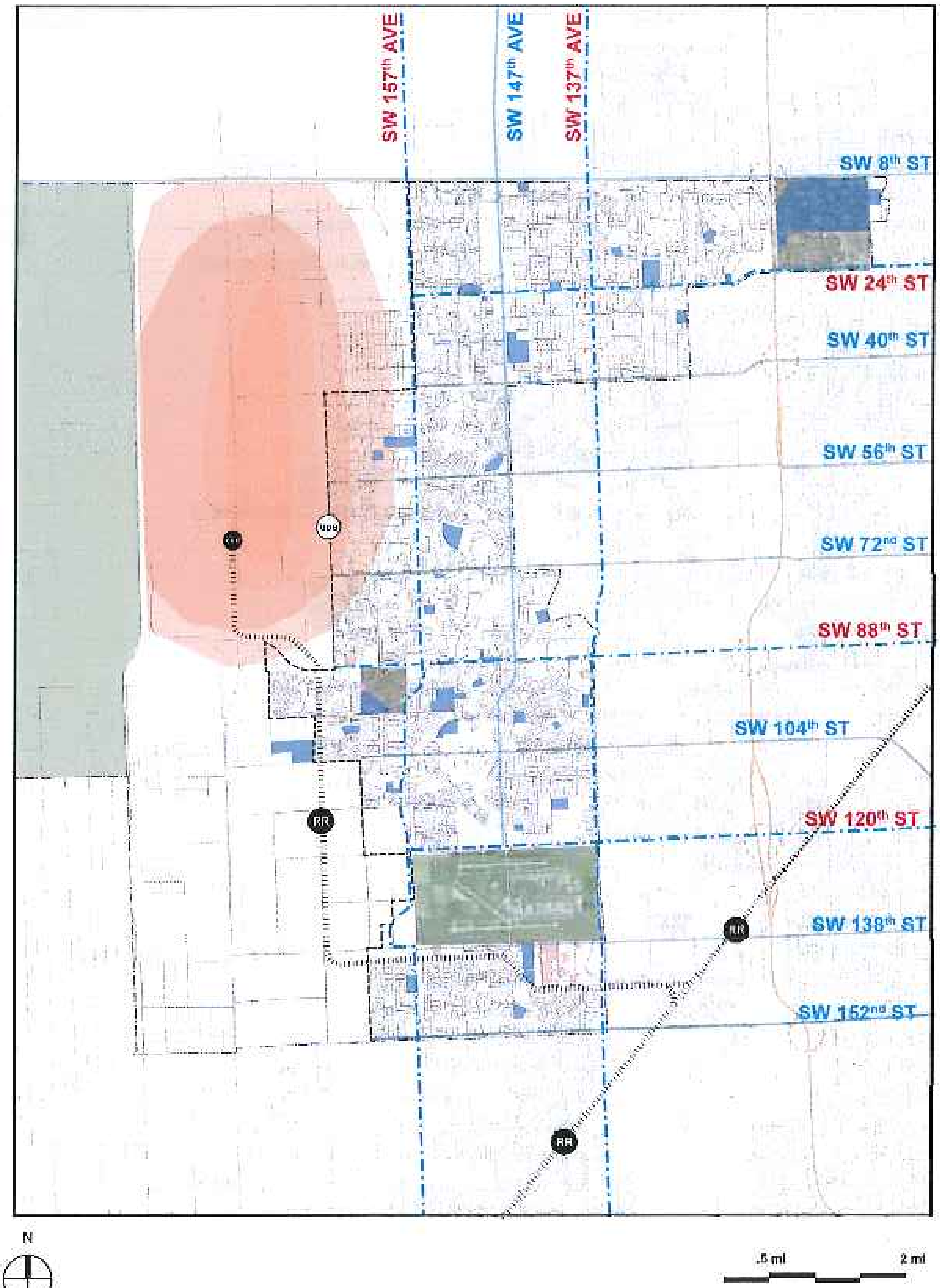

RIGHT-OF-WAY
COMMERCIAL
RESIDENTIAL
TREES
FLOWERING TREES
PALMS
SHRUBS

"BOW TIE" ROAD TYPOLOGY IMPROVEMENTS




MEDIUM TRAFFIC (4 LANES)
BUS STOPS
SIDEWALKS ADJACENT TO STREET
MEDIAN
PROVIDE CROSSING
VIA MEDIAN TO GIVE
FOR PEDESTRIAN CONVENIENCE
PROVIDE BETTER
BUS STOP AREA
SHADING
PROVIDE BETTER
BUS STOP AREA
SHADING

OFFICES + INSTITUTIONS



INDUSTRY

Employment, Industry, and Business

The employment industry and business analysis was performed by quadrants to determine whether economic variations exist within the West End, delineated as follows:

- Northeast Quadrant –
  east of SW 147th Avenue and north of SW 56th Street
- Northwest Quadrant –
  west of SW 147th Avenue and north of SW 56th Street
- Southeast Quadrant –
  east of SW 147th Avenue and south of SW 72nd Street
- Southwest Quadrant –
  west of SW 147th Avenue and south of SW 56th Street

Class of Workers

The West End is home to the County's largest portion of the regional labor force. According to 2012 ACS estimates, there are 105,477 persons 16 years and older in the labor force living in the West End, or 9% of the County's employed labor force.

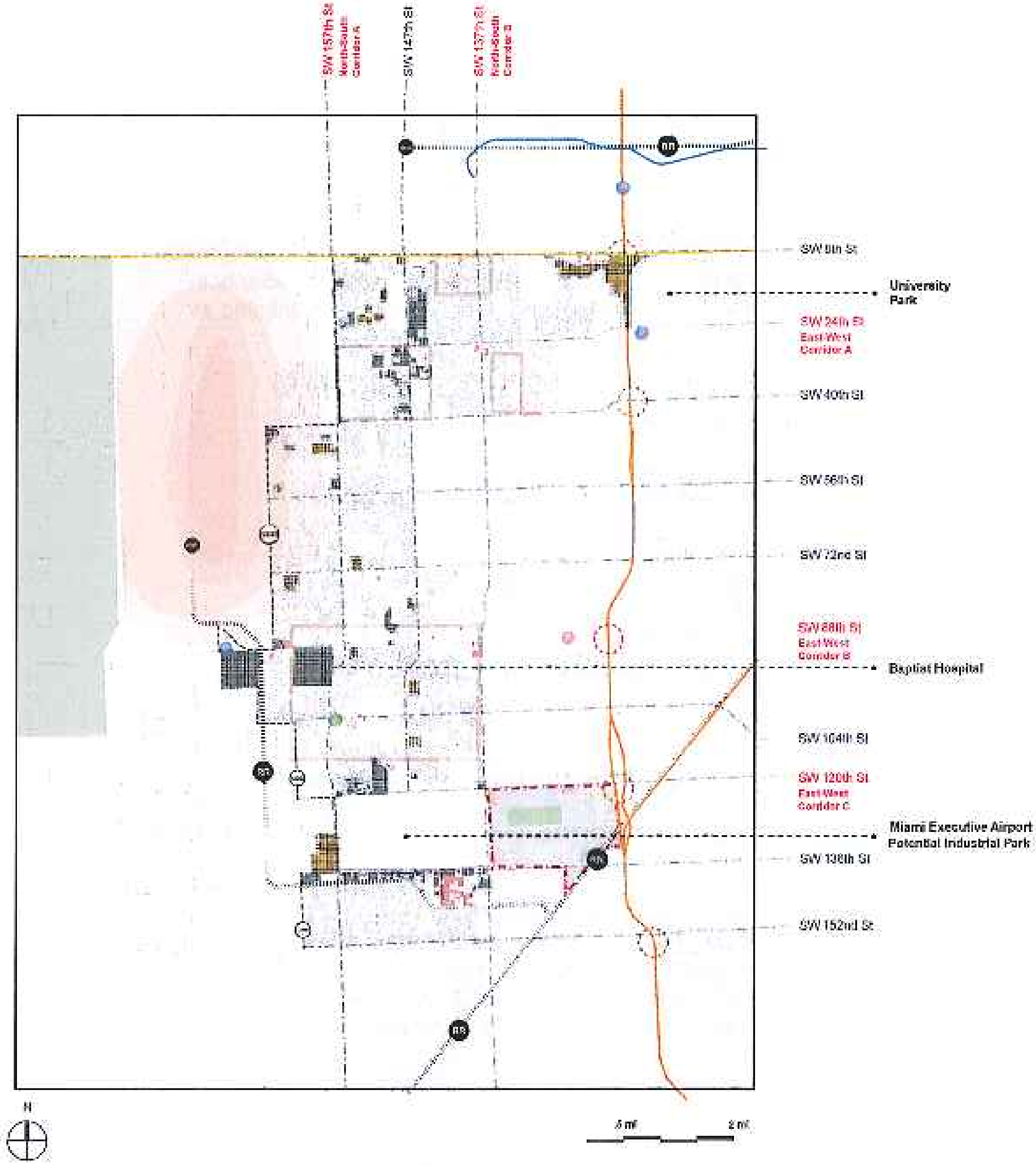
The vast majority of workers are employed in private companies, and the "class of worker" in West End is generally reflective of Miami-Dade County, as a whole. The quadrant analysis found the highest percentage of workers residing in the Southwest (36,285 workers/34 percent) and Northeast (29,265/28 percent) quadrants. The class of worker in all quadrants is generally similar and representative of the County.

The primary source of aggregate household income in the West End is from Wages and Salaries — 84.8 percent, considerably higher than the County average (77.4 percent). This is the highest percentage of all Commission Districts. The West End also has the highest percentage of total income from wage earnings of all Districts and 4th highest gross aggregate income.

Other key workforce characteristics include:

- Median household income ($59,611) 38% above the County ($43,100) and national ($53,046) median. The West End's Median Household Income declined less than the rest of the County — dropping only 2 percent from 2000 to 2010 (adjusted for Inflation).

OFFICES + VACANT LAND



Home Office Concentration
Office
Home Office
Single-Family
Industrial
Commercial
Public Park

Railroad

Urban Development Boundary

One Acre
Vacant Government Owned, Unprotected | 119 Acres
Vacant, Protected, Privately Owned | 75 Acres
Vacant, Protected, Government Owned | 10 Acres
Vacant, Privately Owned, Unprotected | 560 Acres
Total Acreage | ~764 Acres

Turnpike Exit

Florida's Turnpike
SR 836/Dolphin Expressway
SR 41

- The West End has the lowest overall poverty rate of all Districts in the County. Only 7.7 percent of the West End's population lives below the poverty level, and this is decreasing since 2000 (where it was 10.4 percent).
- Residents of the West End have higher average educational attainment than the County. Thirty percent of the West End's population over age 25 have a college degree or higher, ranking it third highest among Commission Districts and above the County's total rate of 25%. The West End population's college education attainment rate increased significantly since 2000.
- Self-employed business owners make up 13.1% of the West End's workforce, compared to 13.9% for the County and 9.4% for the US. This is a very high rate of self-employment. Additionally, 4.1% and 4.2% of the workforce of the Northeast and Southeast West End Quadrants worked full-time at home, compared to 4.5% County-wide, and 4.4% nationwide. Employment by Occupation

The West End's employed population, 16 years and older, is primarily employed in sales and office occupations (36,043 workers) and management, business, science and art occupations (34,982 workers). According to the U.S. Census, "occupation" describes the kind of work a person does on the job. The highest median earnings are in management, business, science, and art occupations ($50,369) with the lowest in service ($18,415).

The occupation mix of the West End workers differs somewhat from Miami-Dade County. The West End has a significantly higher percentage of workers than the County in sales and office occupations management, business, science and art occupations. Sales and Office occupations represent the highest share of occupations for West End residents (34.9 percent), higher than 28.9 percent County average. Conversely, West End has a significantly lower percentage of workers in service, natural resources, construction, and maintenance occupations and production, transportation, and material moving occupations.

Significant variation exists in the mix of occupations in the Southeast and Northwest quadrants where 38 percent of workers are employed in management, business, science, and art occupations. This concentration and mix of occupations is substantially higher than both the West End and Miami-Dade County.

CLASS OF WORKER FOR THE CIVILIAN EMPLOYED POPULATION 16 YEARS AND OVER				District 11			
	District 11	% District 11	% Miami-Dade County	Northeast	Southeast	Northwest	Southwest
Total	105,407	100%	100%	33,926	19,820	16,848	35,259
Private for-profit wage and salary workers:	80,982	76.70%	76.60%	25,848	14,778	12,022	28,508
Employee of private company workers	74,441	70.50%	70.30%	23,703	13,297	10,848	26,721
Self employed in own incorporated business workers	6,541	6.20%	6.30%	2,065	1,481	1,173	1,845
Private not-for-profit wage and salary workers	4,576	4.40%	5.20%	1,371	1,155	721	1,392
Local government workers	8,503	8.10%	8.00%	2,458	1,816	1,227	3,072
State government workers	1,805	1.80%	1.50%	645	312	410	453
Federal government workers	1,524	1.50%	2.00%	402	364	331	703
Self-employed in own not incorporated business workers	7,141	6.70%	6.20%	2,071	1,143	1,124	1,807
Unpaid family workers	163	0.01%	0.01%	31	53	18	66

Source: 2008-2012 American Community Survey

OCCUPATION BY CLASS OF WORKER FOR THE CIVILIAN EMPLOYED POPULATION 16 YEARS AND OVER				District 11			
	District 11	% District 11	% Miami-Dade County	Northeast	Southeast	Northwest	Southwest
Total:	105,477	100%	100%	29,785	19,829	15,848	36,785
Management, business, science, and arts occupations	34,952	33.10%	30.80%	8,850	7,222	8,118	12,792
Service occupations	17,088	16.10%	20.90%	4,853	3,156	2,178	6,861
Sales and office occupations	36,043	34.10%	26.50%	10,017	6,195	5,537	14,294
Natural resources, construction, and maintenance	8,271	7.80%	9.80%	2,551	1,495	800	3,425
Production, transportation, and material moving occupations	9,115	8.60%	10.30%	2,985	1,552	1,107	3,491

Source: 2008-2012 American Community Survey

Employment by Industry

The civilian population of the West End is employed in a wide variety of industries, most notably educational, health and social services (23,465 workers), retail trade (14,698 workers) and professional, scientific, and management (11,858 workers). According to the U.S. Census, "industry" data describes the kind of business conducted by a person's employing organization. As noted above, the vast majority of West End workers are employed by private industries within their respective occupations. West End occupations by industry are generally similar to Miami-Dade County. However, the West End has a significantly higher percentage of workers than Miami-Dade County in educational, health, and social services, financing and insurance, real estate and rental and leasing, and retail trade. There are no significant variations in worker industries among the West End quadrants though the highest concentrations of workers in each respective industry are found in the Southwest and Northeast quadrants.

INDUSTRY BY CLASS OF WORKER FOR THE CIVILIAN EMPLOYED POPULATION 16 YEARS AND OVER	District 11	% District 11	% Miami-Dade County	Northeast	Southeast	Northwest	Southwest
Total:	105 477	100%	100%	29,295	19,820	15,848	36,290
Agriculture, forestry, fishing and hunting and mining	296	0.30%	0.70%	41	113	3	182
Construction	5704	5.60%	7.20%	1846	831	670	2075
Manufacturing	5179	4.90%	5.10%	1092	751	817	2013
Wholesale trade	5755	5.00%	4.30%	1365	753	506	2241
Retail trade	14698	14.00%	12.40%	4061	2571	2107	5019
Transportation and warehousing, and utilities	7819	7.40%	7.10%	2266	1594	1004	3211
Information	2643	2.50%	2.30%	650	537	421	1025
Financing and insurance, and real estate and rental and leasing	8153	8.70%	7.50%	2737	1601	1631	2904
Professional, scientific, and Management	11858	11.20%	12.40%	3187	2440	2042	4209
Educational services, and health care and social assistance	23465	22.20%	20.30%	6477	4733	3295	8959
Arts, entertainment, and recreation and accommodation and food services	8732	8.30%	10.50%	2044	1850	1895	4042
Other services, except public Administration	6672	6.20%	6.30%	1660	1443	708	2811
Public administration	3779	3.50%	3.80%	1026	793	847	1113

Source: 2008-2012 American Community Survey

Business Inventory

According to 2014 Nielsen Business-Facts, there are 4,898 business located in the West End. The highest number of businesses is found in Retail Trade (728 businesses/14.9 percent) and Health Care and Social Assistance (656 businesses/13.4 percent). The West End has a significantly higher concentration of businesses in Construction, Retail Trade and Health Care and Social Assistance than Miami-Dade County. Conversely, the West End has significantly lower concentrations of businesses in Wholesale Trade and Professional, Scientific, and Technical Services.

The vast majority (88.5 percent) of businesses in the West End are less than 10 employees. Only 1.2 percent (89 total) of businesses are greater than 50 employees. Annual sales activity is reflective of the large number of small and micro-businesses in the West End with 75 percent (3,648 businesses) generating annual sales of under 1 million. Only 2 percent (102 total) of businesses generate over 10 million in annual sales.

The business inventory reveals a mismatch between West End the West End's labor force, local employment, worker occupations and industries:

- Despite its large employed population, the total number of jobs at businesses and firms within the West End is less than 40,000.
- Occupations and industries within the West End are also mismatched. 11.2 percent (1,328 workers) in the West End are employed in professional, scientific, and technical services occupations. However, only 9.4 percent of West End businesses (compared to 15.6 percent in the County) are classified as Professional, Scientific, and Technical Services establishments. 3.4 percent (656) of the West End's business establishments are Educational and Health Care and Social Assistance establishments but 22.2 percent (23,465 workers) are employed as educational, health care and social assistance workers.

South West End, Aerial 1

West Kendall Baptist Hospital, Aerial 2

The West End's high number of employed persons is a key element in its economic strength, resilience, and community fiber. However, the mismatch between the West End's high number of resident workers (employees), and low number of jobs and mismatched occupations means that an overwhelming proportion of the West End's residents leave the West End to work each day. This characteristic has important negative impacts on the West End (see Transportation, below).

District 11 Business Inventory

NAICS	Description	Businesses	% District 11	% Miami-Dade
44-45	Retail Trade	728	14.90%	13.40%
62	Health Care and Social Assistance	656	13.40%	11.70%
81	Other Services (except Public Administration)	480	9.80%	7.40%
54	Professional, Scientific, and Technical Services	458	9.40%	15.60%
23	Construction	353	7.20%	5.20%
72	Accommodation and Food Services	340	6.90%	6.60%
52	Finance and Insurance	313	6.40%	5.70%
53	Real Estate and Rental and Leasing	270	5.50%	6.20%
56	Administrative and Support and Waste Management and Remediation Services	253	5.20%	4.80%
42	Wholesale trade	227	4.60%	11.80%
48-49	Transportation and Warehousing	150	3.10%	4.10%
31-33	Manufacturing	143	2.90%	2.70%
99	Unclassified	143	2.90%	0.00%
61	Educational Services	127	2.60%	1.20%
51	Information	112	2.30%	1.70%
71	Arts, Entertainment, and Recreation	99	2.00%	1.30%
92	Public Administration	39	0.80%	1.50%
11	Agriculture, Forestry, Fishing and Hunting	2	0.00%	0.00%
22	Utilities	2	0.00%	0.00%
55	Management of Companies and Enterprises	2	0.00%	0.00%
21	Mining, Quarrying, and Oil and Gas Extraction	1	0.00%	0.00%
	Totals:	4,898	100.00%	77,123

Sources: Nielsen Business-Facts; U.S. Census, *County Business Patterns*.

The West End is home to three of the County's most significant economic assets: 1) Baptist Health, 2) Florida International University, and 3) Miami Executive Airport.

The West Kendall Baptist Hospital is part of the Baptist Health South Florida hospital network – a national not-for-profit system of hospitals. The Hospital is a major regional employer, with over 15,000 employees, 2,211 medical staff, net operating revenues of $2.17B, over 71,000 annual admissions, 242,177 urgent care visits, 313,116 emergency center visits, and 7,170 international patient visits each year in 2013. The Hospital is a comprehensive care facility.

Florida International University, located at the Northern edge of the West End, is a State University currently the 4th largest Public University in the Nation, with over 54,000 students, and over 8,000 faculty and staff. FIU plans to grow as a major national research institute.

Miami Executive Airport, formerly the Kendall-Tamiami Airport, is a public airport located on 1,380 acres in the southwest portion of the West End. Operated by the Miami-Dade Aviation Department, the airport serves mostly single engine light aircraft, and is a US International Port of Entry, with a US Customs Inspections station based there. Over 450 aircraft are permanently based at the airport, which hoisted over 186,000 takeoffs and landings in 2012.

West Kendall Baptist, FIU, and the Miami Executive Airport have significant economic impact in the West End, with additional significant expansion capacity that could have a critical role in the Community's future development. The West Kendall Baptist campus includes large acreage slated for future development, which may include health care facilities, research and/or medical offices. FIU received the rights to negotiate the takeover and redevelopment of the County Youth Fair Grounds — 64 acres of largely vacant land directly adjacent to the University. In addition to underutilized building space inside the Airport, Miami Executive Airport is surrounded by additional vacant acreage ideally suited for air transport, manufacturing, research, and avionics businesses.


1

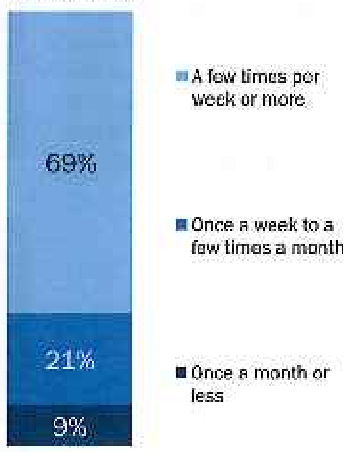

2


3

Florida International University, Aerial 1
West Kendall Baptist Hospital, Aerial 2
Miami Executive Airport, Aerial 3

Millennials frequently use multiple transportation options & describe this as an increasing trend.

Frequency of Using Multiple Transportation Options to Reach a Destination
(Among % Total)

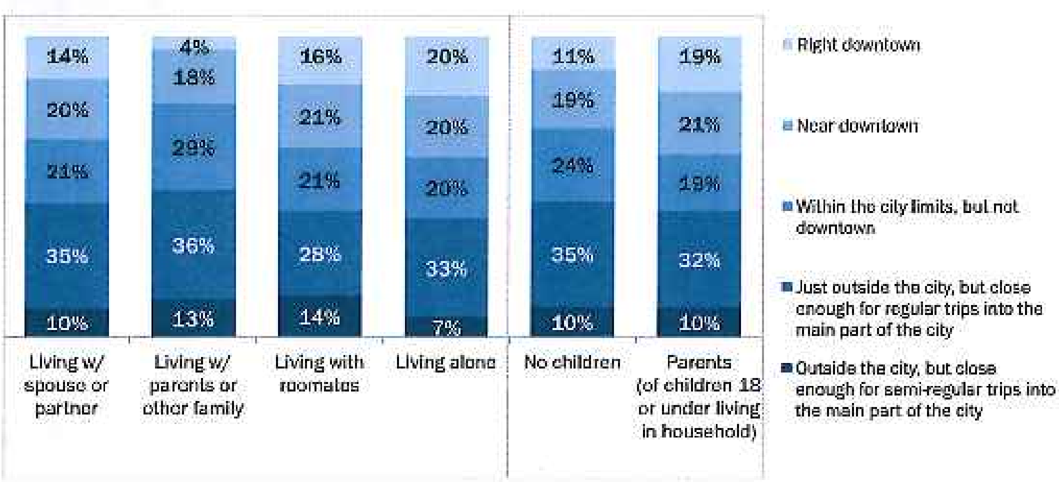


3
is the average number of transportation options used on a typical trip

Q34 - Which of these trends have you noticed others doing more of or seen more of in your own life or behaviors?	**TOTAL** (n=1,000)
Using more than one transportation option to reach a destination	42%

Those who live alone or are parents living with children are most likely to live in or near "downtown".

Home Neighborhood Proximity to "Downtown"
(Shown among Living Situation Groups & Parental Status)



IDENTITY

Identity: Residents Perceptions, Key Issues in marketing the District

This study includes an analysis of place identity as part of our fundamental belief in the significance of the perception of the character of place and it's long-term sustainability and growth. Isil Kaymaz outlines the key ideas of community identity in the following passage from "Urban Landscapes and Identity," in *Advances in Landscape Architecture*:[i]

> Place identity is an important dimension of social and cultural life in urban areas and continuity of place identity is strongly linked to place attachment and sense of belonging. In environmental psychology, it is assumed that people intrinsically strive to develop a sense of belonging to a place. Place attachment and sense of belonging are crucial in order to establish an emotional and cognitive bond with a place, which leads to the feeling of security and sense of community. Thus, identity of a place is more than just the physical appearance, but also involves a "meaning" for the individual and the community.

The following sections outline the general characteristics observed across the population, environment, and land use by the study team and how they can be enhanced to create a stronger sense of place in the West End.

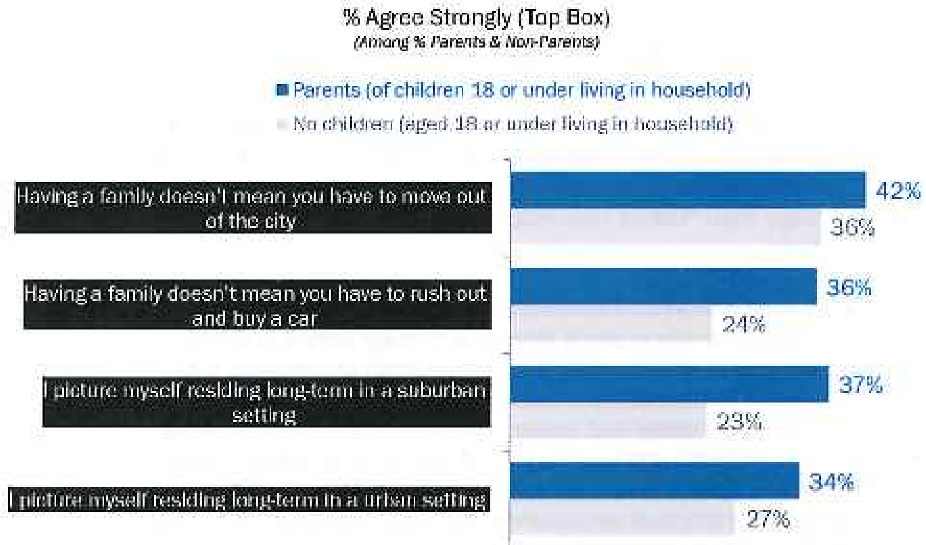
Diversity of Cultures and Incomes

Unique to the South Florida region is population diversity that includes peoples from cultures across the North and South Americas including Mexico, Venezuela, Cuba, Brazil, Argentina, Columbia, Uruguay and Panama. A constant in-out migration of foreign-born residents is unique to this area as a whole (see Demographics, this report). It is a significant factor in maintaining a viable, healthy community, as these residents are educated, entrepreneurial, and family-oriented.

Building on the similar success of neighborhoods in Miami-Dade like Doral, South Miami and Sunset Plaza, Merritt Park in Coral Gables and the special zoning district of Midtown, the West End can capitalize on the influx of foreign nationals, the millennial generation, the x and y- generations, and the baby boomers.[ii]

Although the total amounts have not been formally quantified, indicators of the increasing levels of direct foreign investment in Miami-Dade include 1) the high proportion of first, condominium sales, and more recently, single-family homes, to foreign buyers — 78% of all home sales in the Miami metro region are now in cash, 2) notable large-scale development projects, including the University of Miami Life Science & Technology Park, and 3) the large-scale entry of foreign institutional investors into the commercial real estate market, purchasing major office and commercial real estate portfolios across South Florida, and 4) foreign demand for residential properties, that both consumed post-recession inventories and drove up home prices.

On an attitudinal level, Millennial parents may be more likely to feel **freedom in options** for how they'd like to live – with or without a car, in an urban or suburban environment.



Ease of getting around, public transit availability, proximity to work, & city culture are among top reasons for current living location.

Q22 - Which of the following best describe the reasons you choose to live in this area? I live in this area because... Check All (n varies by sample group)	TOTAL	Boston, MA	Chicago, IL	San Francisco, CA	Seattle, WA	Portland, OR	Washington, DC
n=	1000	167	167	167	167	167	167
It is an easy city to get around	42%	45%	41%	43%	38%	48%	38%
It's close to my work	38%	40%	34%	42%	37%	31%	43%
I love the culture here	37%	37%	39%	37%	37%	44%	28%
There are plenty of public transit options available	36%	38%	35%	36%	34%	39%	36%
My family lives here	36%	33%	36%	42%	35%	40%	29%
My friends or significant other lives here	35%	35%	33%	36%	31%	40%	33%
There are lots of career opportunities	32%	30%	28%	34%	34%	24%	44%
It's a pedestrian-friendly city	31%	36%	22%	35%	28%	42%	23%
I grew up here	31%	29%	29%	31%	32%	42%	21%
I wanted to be in an urban location	24%	31%	32%	24%	17%	16%	23%
I don't feel "trapped" or stuck with what's around me	22%	24%	16%	23%	19%	31%	20%
I can be around like-minded people	21%	21%	21%	19%	21%	28%	19%
There are smaller neighborhoods or boroughs with distinct communities & offerings	20%	21%	18%	19%	22%	23%	17%
I wanted to be in an suburban location	16%	13%	15%	19%	16%	14%	19%
I have children now	12%	9%	11%	10%	16%	13%	12%
It was the only place I could afford	11%	10%	18%	13%	11%	6%	8%
I want to have kids someday	10%	10%	12%	9%	10%	11%	7%

How Residents want to spend Their Time

Analysis of the development patterns of recreational, cultural, entertainment and family activities within the County clearly show the West End's lack of facilities, especially considering its high disposable income. See Office and Industry for distribution and type of institutional, retail, and commercial enterprises. This issue is discussed further in the Residents Perception section of this section.

Community Institutional and Economic Assets

The West End is strategically located in the growing west corridor— within minutes of the region's most important economic assets — drivers of regional employment growth including major employers, institutions, infrastructure, and culture. They include:

Major Universities:

- Florida International University Modesto Madique Campus
- CBT College – West Kendall Campus
- University of Phoenix - Kendall Learning Center
- American Medical Academy
- Nova Southeastern University (10 minute drive)

Medical Service and Research Institutions:

- West Kendall Baptist Hospital
- Wertheim School of Medicine at FIU
- Kendall Regional Medical Center: Maternity Suites
- West Kendall Medical Center
- Miami-Dade Adult Care Center and Miami-Dade Child Development
- Terra Environmental Research Institute (15 minute drive)
- Multiple Medical Services Centers

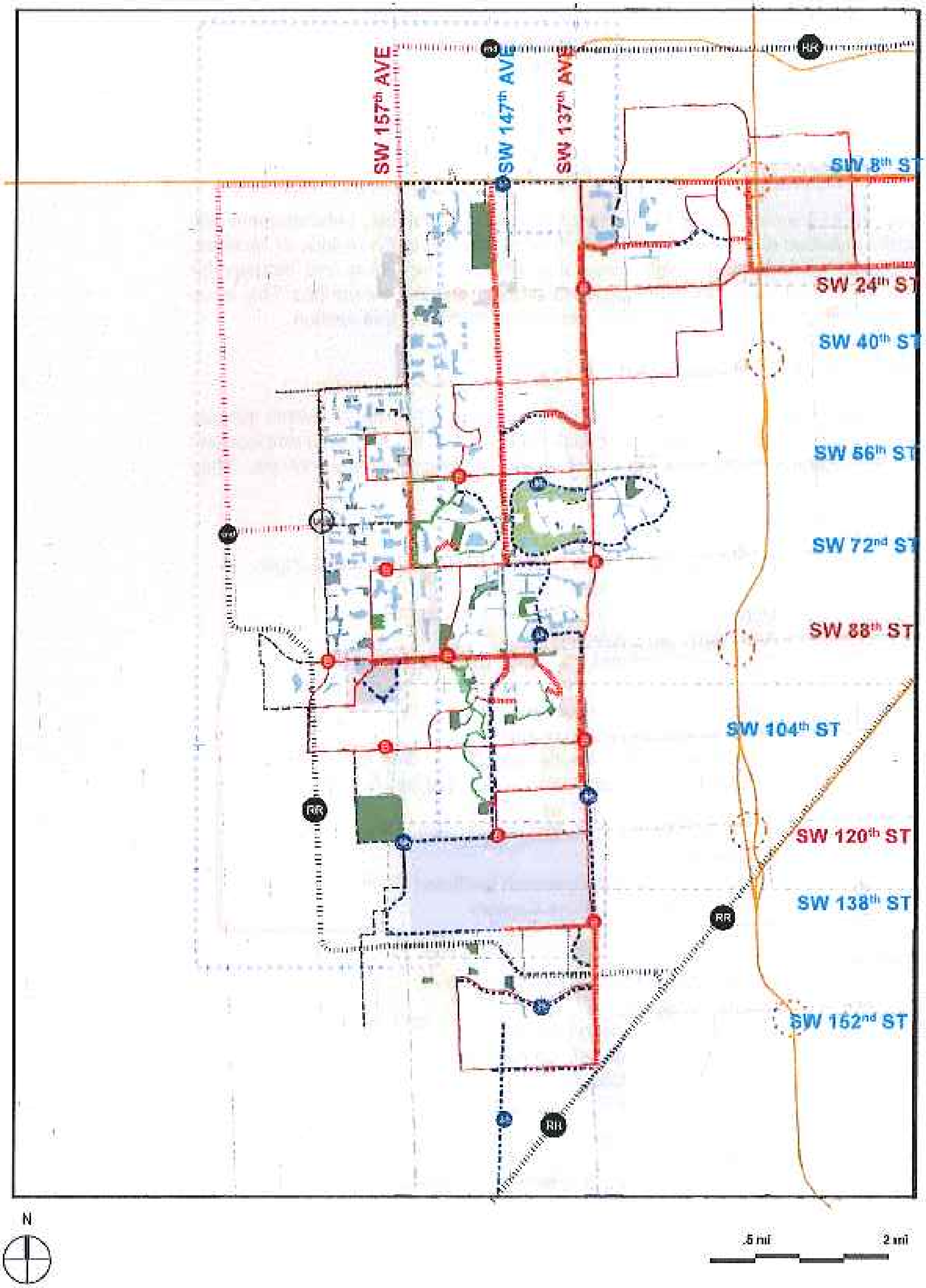
Cultural and Civic Facilities:

- West Kendall Regional County Library
- Country Walk Library
- Kendall Lakes Branch Library
- Lakes of the Meadow Branch Library
- Tamiami Branch Library
- Auto Tag Division

Parks and Recreation:

- Everglades National Park (International Biosphere Reserve, World Heritage Site and a Wetland of International Importance)
- Big Cypress Swamp
- Trail Glades Range County Park (5 minute drive)
- Hammocks Community Park
- Westwind Lakes Park

INTRADISTRICT TRANSPORTATION LOOP



- Boystown Pineland County Park
- Kendall Soccer Park (10 minute drive)
- Additional County Parks, Waterways, Canals, and Lakes

Airports and Infrastructure:

- Miami Executive Airport
- Miami International Airport and Free Trade Complex (30 minute drive)
- Fort Lauderdale-Hollywood International Airport (45 minute drive)
- Opa-Locka Executive Airport (24 minute dive)
- Port of Miami (45 minute drive)
- Port Everglades – (60 minute drive, Hollywood)
- CSX Railroad line (currently one line terminates in the West End- see Intradistrict Transportation Loop Map on the left page.)

Business Centers, Major Employers and New Neighborhoods:

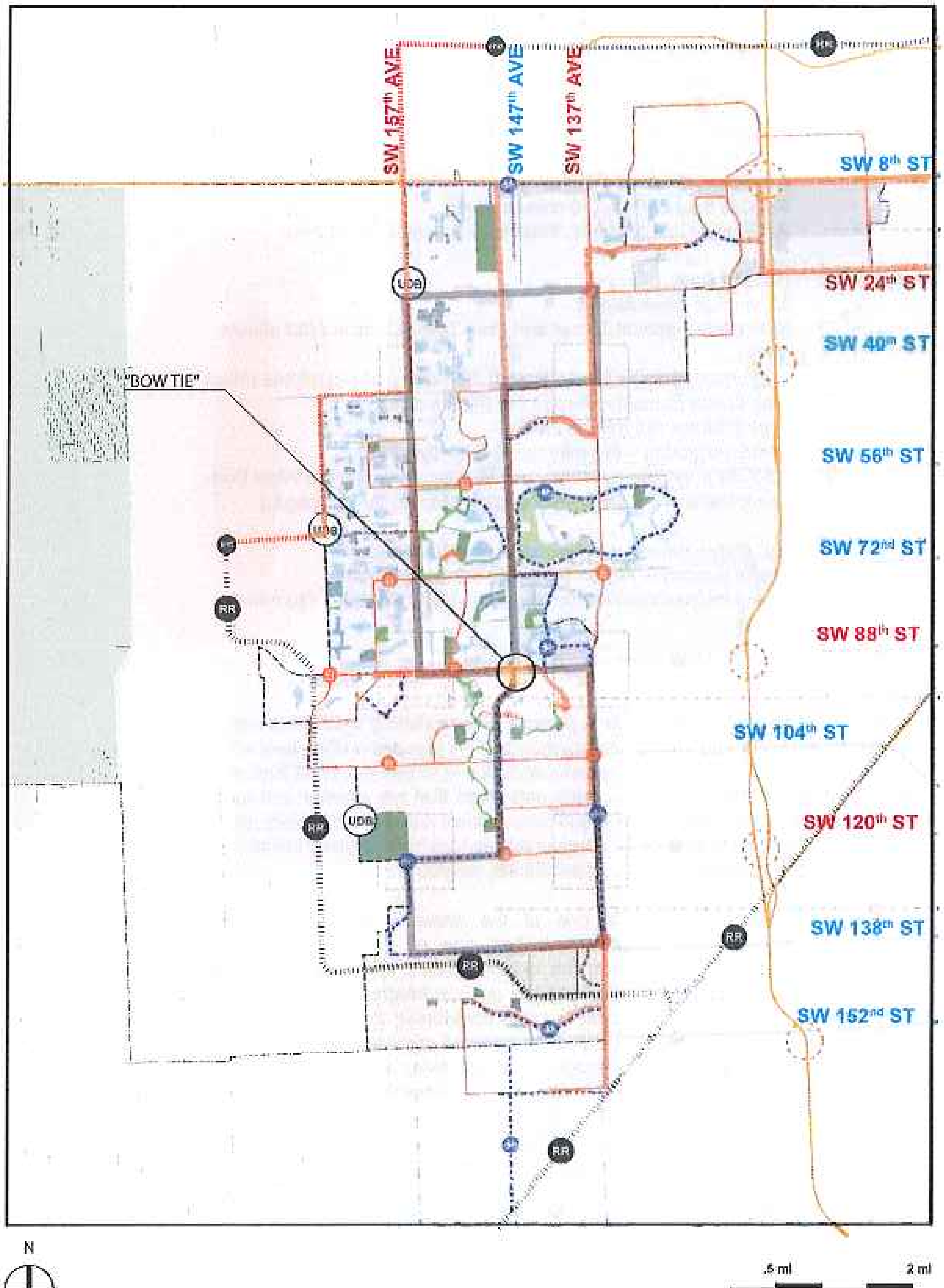
- Miami Executive Airport (formerly Tamiami Airport)
- Miami International Airport and Free Trade Complex (30 minute drive)

Brand Identity for the West End

The West End can immediately begin a process of establishing a coherent name, or names for the West End and its neighborhoods. This process is often best when it is community-driven. The current recommendation is to use the West End as a general descriptor for the area but create sub-areas that are smaller and more easily described to residents. Creating sub-areas allows residents to identity within aggregates of neighborhood groups, community services and localized institutions like elementary, middle and high school affiliations, religious and volunteer groups.

- Land Use: This is one of the areas strongest and most underutilized assets as it has one of the largest number of parks and lakes in the unincorporated Miami-Dade County. In the case of identity and the general image of the West End, limited diversity in land use has contributed to a monoculture of 'big box' retail stores, service-oriented commercial venues such as gas stations, fast-food restaurants, branch banks and supermarkets. Creating a diversity of uses from high-to-low-end retail including entertainment venues such as restaurants sports bars, movie theaters and sports facilities would add variety to the building environment and create a synergy between greenspaces, urban corridors and residential land use.

INTRADISTRICT "BOW TIE" TRANSPORTATION LOOP

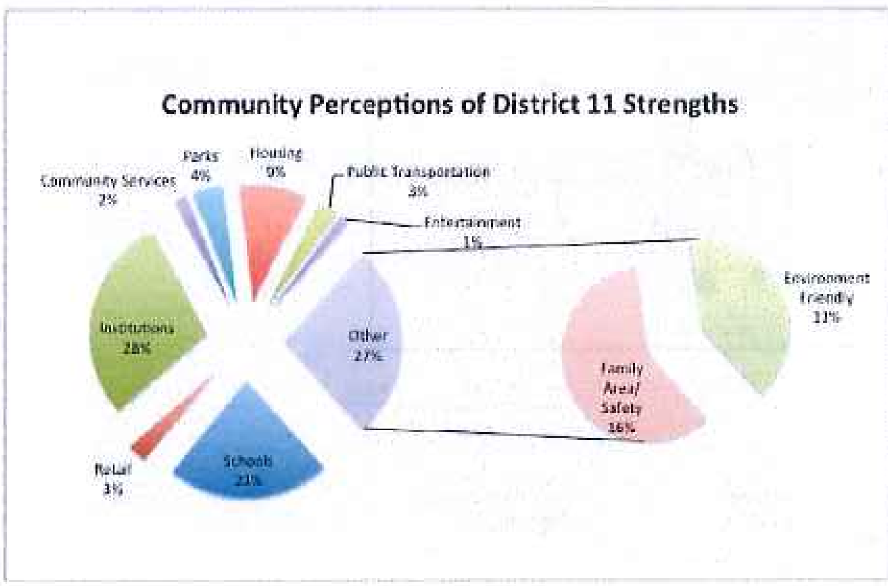


Residents Perception of the West End: Survey Findings

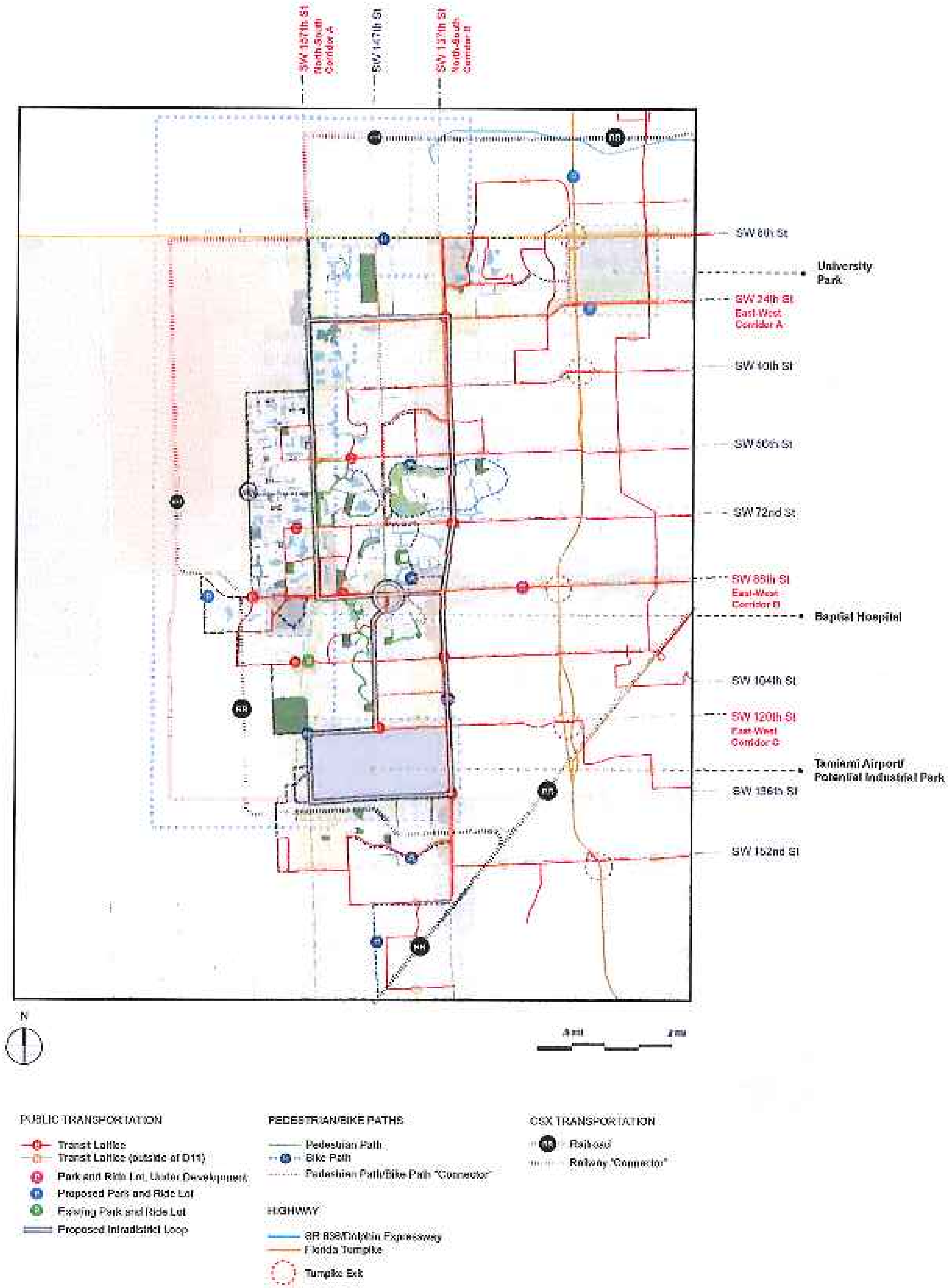
The FIU team or team members attended multiple community meetings, participated in the Kendall Avenue Charrette conducted by the Miami-Dade County Department of Planning & Zoning, the Audubon Miami Design Charrette, and met with community residents, stakeholders and institutional leaders.

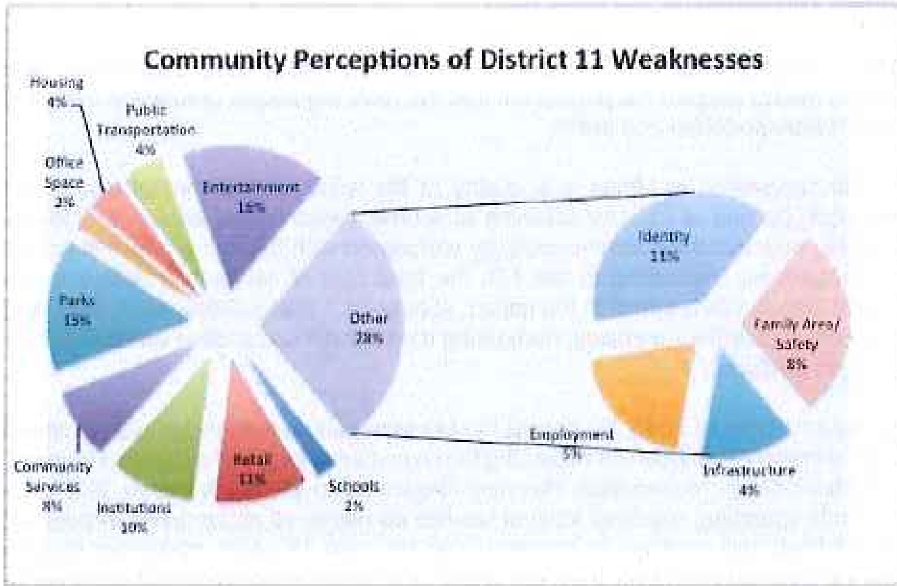
In June of 2013 we conducted a Strengths and Weaknesses Survey with West End residents during a Community Master Planning meeting. The meeting was a general introduction to the community of the FIU team and our general goals. We did not discuss with the participants any preferences for strengths, weaknesses, opportunities or threats (SWOT) analysis. Participants included community planning committee members and active community residents.

In a two-step process, attendees developed a rank-ordered listing of 1) Issues, Problems and Challenges, and 2) Assets, Opportunities and Strengths. Student facilitators compiled answers, recording each unique statement on two large posters: Issues & Problems and Assets Opportunities & Strengths. Attendees were given 10 blue dots and 10 greens dots and instructed to places as many or as few dots on any issue as they desired. The only restriction was that blue dots be placed on the Assets poster and green dots placed on the Issues poster. Issues were then ranked according to priority. The results are as follows:



INTERMODAL CIRCULATION LOOP





Results highlighted resident's perceptions of what is working and what needs improvement in their community. One of the great strengths of the West End in this survey is the Institutions (18% overall positive). This includes West Kendall Baptist, FIU, and Miami Executive Airport along with local libraries. Schools, family friendly areas and environment are also high. Of the weaknesses, three are of particular importance: public transportation, employment opportunities and retail. This result coincides with our physical and environmental findings indicating that although there is good public transportation, it is not organized in such way that residents are aware of its availability. It may also be that current services are not organized to be appealing, visually present or coordinated to resident lifestyle modes to be maximally useful.

Current retail in the West End and office space is discussed in Land Use in this report. The key points relevant to Identity are:

- Residents' median income gives them greater buying power than the standard of available retail. This includes goods, services, and entertainment opportunities.

- Current office space is inadequate and may even be inappropriate for these residents. Data indicates a high number of self-employed, work-in-home or telecommuters in the West End. Office space (> 5% of Land Use) is designed for larger corporate clients. This community may benefit from doing smaller, shared office spaces located along the Urban Corridors near community services, restaurants and public transportation.

Public Transportation and Place-ness

Our findings across all indicators (Traffic and Transportation, Economics, and Environment) support the perception that the most significant problem in the West End is transportation and traffic.

Traffic congestion in Miami is a quality of life issue, environmental issue, and increasingly, one of its most pressing economic development issues. Employers seeking new locations are increasingly concerned with the lost productivity costs of congestion. According to the TTI, the total cost of congestion delays in the Miami area the 5th highest in the nation, at over $3.7 Billion dollars each year. And this cost is steadily increasing, hampering the region's competitive advantages for new job creation.

Between 2015 and 2035, Southeast Florida transportation agencies plan to spend approximately $58 billion on improving the region's roadways and transit. However, the Miami-Dade Metropolitan Planning Organization (MPO) forecasts that even with this spending, roadway level of service on nearly all major roads throughout Miami-Dade will continue to degrade over the next 15 years, rush-hour speeds will be 20% sslower than they are today, and traffic congestion will continue to increase. Many road segments in the County are already at or above capacity.

The region's traffic congestion issues are a product of population growth, a lack of land to add new road lanes, and land-use patterns. The bulk of the City's businesses and jobs are concentrated in six zip code statistical areas — the corridor stretching from downtown through Miami International Airport to Doral, while most of the County's population lives in the arc outside of the City of Miami at mostly suburban residential densities. West End is one of the fastest growing and most important unincorporated areas in the County as it competes against increasing traffic congestion, quality of lifestyle issues that are currently beginning to effect the perception of the livability for it's various neighborhoods, urban corridors and community venues.

Addressing this is paramount in order to keep current and attract growing generations of residents, specifically the millennials (those born after 1981). Key issues for this demographic that impact community perception related to transit are:[iii]

- The new generation of users cutting across age and income demographics is a multimodal user. They choose the best transportation mode (driving, transit, bike or walk) depending on the trip they are taking.
- Providing a multitude of transportation choices supports a multi-modal lifestyle.
- Public transportation options are considered the best for digital socializing and among the most likely to connect the user with their communities. Transit should allow riders to work as they travel, a trend noted by 40% of millennials polled. These benefits

of public transit need to be fully leveraged by the industry, as they provide a clear competitive advantage.

- We looked at data for millennials to understand general trends, but recent surveys and our own survey indicate that these are general concerns shared by all groups. Transit users would like to see the following in the next ten years: 1) 61% more reliable systems, 2) 55% real-time updates, 3) 55% Wi-Fi or 3G/4G wherever they go, 4) 44% a more user-friendly and intuitive travel experience. Fully leveraging technology, through real-time transit applications that connect users with community amenities, through smartphone fare payment, and the provision of Wi-Fi and 3G/4G, will allow transit users to be more spontaneous, thus addressing the key competitive advantage of the car.

The identity of a place changes, thus perceived identity, can be used to identify and detect improvement measures towards a desired image and environment quality. For some areas or cities identity is an anchor that provides continuity for development by preserving traditions, for other areas identity can mean building on a unique characteristic whether geographical, like Miami Beach, or industry-related like Hollywood, CA and its' association with the entertainment industry. Individuals, communities, businesses and authorities cherish and safeguard various aspects of the identity of place and its people for different reasons including originality, sense of belonging, pride and branding.[IV]

Lush landscape + Traffic-calming measures 1
Sidewalk Cafes 2
Narrow Streets + Wide Sidewalks 3

[I] Isil Kaymaz (2013). Urban Landscapes and Identity, *Advances in Landscape Architecture*, Dr. Murat Ozyavuz (Ed.), ISBN: 978-953-51-1167-2, InTech, DOI: 10.5772/55754. Available from: http://www.intechopen.com/books/advances-in-landscape-architecture/urban-landscapes-and-identity. See also, M Sepe, Place identity and placemaker: planning the urban sustainability. Journal of Urban Planning and Development, 136 (2), DOI: 10.1061/(ASCE) 0733-9488(2010) 136:2(139 EOF146 EOF)

[II] **Millennials** (also known as the **Millennial Generation** [1] **or Generation** Y) are the demographic cohort following Generation X. There are no precise dates when the generation starts and ends. Researchers and commentators use birth years ranging from the early 1980s to the early 2000s. The US millennial population is predicted to be 90 million. As of 2012 there are 80 million millennial in the US. From, William Strauss, Neil Howe (2000). *Millennials Rising: The Next Great Generation*. Cartoons by R.J. Matson. New York, NY: Vintage Original. p. 370. ISBN 0-375-70719-0. Retrieved 17 October 2013.

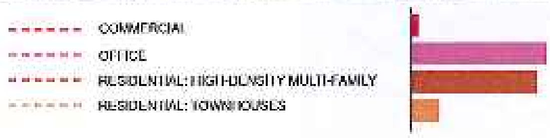
[III] From Millennials and Mobility: Understanding the Millennial Mindset, APTA, American Public Transportation Association (APTA), with funding provided through the Transit Cooperative Research Program (TCRP) Project J-11, Quick-Response Research on Long-Term Strategic Issues. The TCRP is sponsored by the Federal Transit Administration (FTA); directed by the Transit Development Corporation, the education and research arm of the APTA; and administered by The National Academies, through the Transportation Research Board. Project J- 11 is intended to fund quick response studies on behalf of the TCRP Oversight and Project Selection (TOPS) Committee, the FTA, and the APTA and its committees.

[IV] Nils Scheffler, Paulius Kulikauskas, Fernando Barriero, "Managing Urban Identities: Aim or Tool of Urban Regeneration?" in Urbanact Tribune, http://urbact.eu/fileadmin/general_library/Managing_Urban_Identities_01.pdf

MIAMI-DADE COMPARATIVE SITE STUDY

Downtown Doral 1
Midtown Miami 2
The Shops at Sunset Place 3
Office Space 4

1 Downtown Doral



Aerial view of Downtown Doral 1
High-Density Residential Space 2
Townhouses 3
Office Space 4

2 Midtown Miami


1

2


3

Lush landscape + Traffic-calming measures 1

Sidewalk Cafes 2

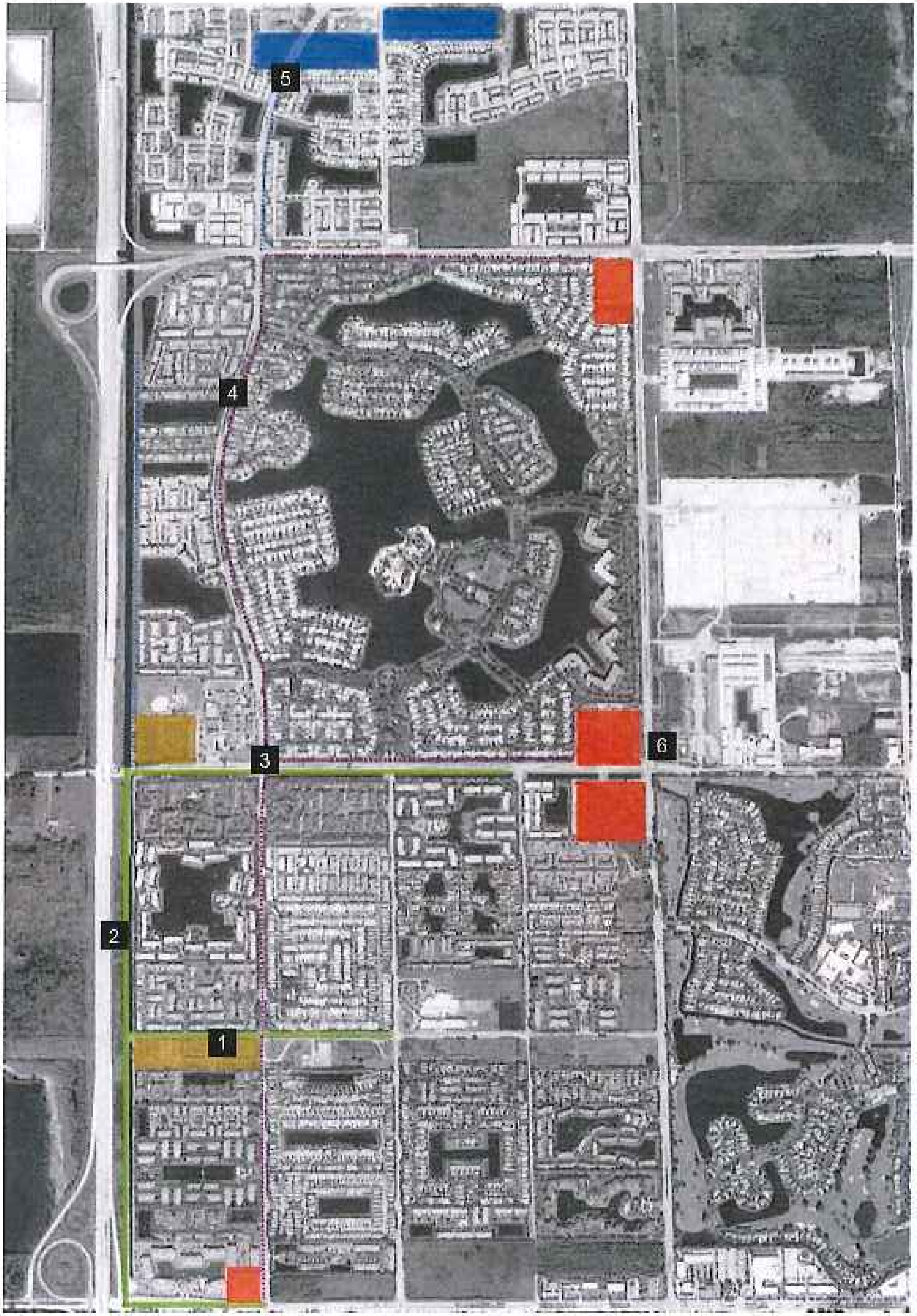
Narrow Streets + Wide Sidewalks 3

3 The Shops at Sunset Place

N

Pedestrian-friendly Paths 1
Open/Public Space 2
Outdoor Seating Areas 3

4 Doral



Parks 1
Linear Park 2
Linear Parks + walkways 3
Resident walkways 4
Future Parks + Corridors 5
Commercial 6

APPENDIX A

List of Documents

Description	Name	Type	No.
MAPS	Clearwater_Map	png	1
Land Use	FortLauderdale_Map		1
Land Use	Gainesville_Map		1
Land Use	Hollywood_Map		1
Land Use	MiamiGardens_Map		1
Land Use	PembrokePines_Map		1
Land Use	Tallahasse_LandUse	jpg	1
Land Use	Tallahassee_Map	png	1
	BOB GRIFFITH CMP_BOT_Sept 2010_FINALREV - 10-20-10.pdf	pdf	1
FIU	FIU_CMP_Focus_Group_1_Mtg_4_2013_1_09.pdf	pdf	1
FIU	FIU_CMP_Focus_Group_1_Session_1_08_28_12.pdf	pdf	1
FIU	FIU_CMP_Session_2_Focus_Group1_PowerPoint_10_4_12.pdf	pdf	2
FIU	FIU_Section1_main3		3
FIU	FIU_Section2_main4		1
FIU	FIU_Vision PlanUP_main1		1
FIU	FIU_VisionPlan_EC-BB_main2_0		1
	Focus_Group_1_Academics_FIU_CMP_12_4_12	pdf	2
	MMC_2010_2020	pdf	1
	*commission-district-2013-adopted.pdf		
	CurrentMunicipalitiesMDC	pdf	15
EAR Changes	LandUse_MapofChanges	pdf	1
	Map_AllCommissionDistricts	pdf	1
Sus Env	Map_BrownfieldsAreas	pdf	1
	Map_commission-district-11	pdf	1
	Map_CommissionDistrict11Boundaries	pdf	1
	Map_dist11_lrg_map	pdf	1
Cad	Map_District11-Boundaries	pdf	1
Cad	Map_District11-Boundaries2	pdf	1
	Map_District11-Comission.pdf	pdf	1
Land Use	Map_District11-LandUse	pdf	1
	Map_District11-lrg	pdf	1
	Map_District11-MetrobousRoutes	pdf	1
Trans	Map_District11-Streets	pdf	1
	Map_District11-UnincorporatedZoningDistricts	pdf	1
	Map_District11-WellfieldProtectionAreas	pdf	1
	Map_District11	pdf	1
	Map_District11BaseMap_smaller	jpg	1
	Map_District11BaseMap	jpg	1
	Map_District11BaseMapwithBoundaries_optimized	pdf	1
Cad	Map_District11BaseMapwithBoundaries	jpg	1
Cad	Map_District11BaseMapwithBoundaries	pdf	1
Cad	Map_District11Boundaries	pdf	1
	Map_Florida-Counties	pdf	1
	Map_FloridaCounties	pdf	1
Land Use	Map_land-use	pdf	1
Trans	Map_metrobous-routes	pdf	1
	Map_MiamiDade-AllCommissionDistricts	pdf	1
Sus Env	Map_MiamiDade-BrownfieldAreas	pdf	1
Sus Env	Map_MiamiDade-BrownfieldsAreas	pdf	1
	Map_MiamiDade-CommissionDistricts2013	pdf	1
	Map_MiamiDade-Parks-Masterplan	jpg	1
	Map_MiamiDade-ParksMasterplan	jpg	1

Description	Name	Type	No.
	Map_MiamiDade-Towns	pdf	1
Trans	Map_MiamiDade-TransitSystem	pdf	1
	Map_SouthFlorida-DRIs	pdf	1
Trans	Map_street	pdf	1
Trans	Map_Transit-system	pdf	1
	Map_wellfield	pdf	1
Zoning	Map_zoning-use	pdf	1
	Maps_TownsOfMiamiDadeCounty	pdf	1
Historic Maps	Map_Florida_2009	jpg	1
Land Use	Map_MiamiDadeCounty_1839	jpg	1
Land Use	Map_MiamiDadeCounty_1842_GreenLeafMap	jpg	1
Land Use	Map_MiamiDadeCounty_1845	jpg	1
Land Use	Map_MiamiDadeCounty_1850	jpg	1
Land Use	Map_MiamiDadeCounty_1850(2)	jpg	1
Land Use	Map_MiamiDadeCounty_1856	jpg	1
Land Use	Map_MiamiDadeCounty_1857	jpg	1
Land Use	Map_MiamiDadeCounty_1859	jpg	1
Land Use	Map_MiamiDadeCounty_1863	jpg	1
Land Use	Map_MiamiDadeCounty_1865	jpg	1
Land Use	Map_MiamiDadeCounty_1873	jpg	1
Land Use	Map_MiamiDadeCounty_1874	jpg	1
Land Use	Map_MiamiDadeCounty_1877	jpg	1
Land Use	Map_MiamiDadeCounty_1880	jpg	1
Land Use	Map_MiamiDadeCounty_1880(2)	jpg	1
Land Use	Map_MiamiDadeCounty_1882	jpg	1
Land Use	Map_MiamiDadeCounty_1883	jpg	1
Land Use	Map_MiamiDadeCounty_1886	jpg	1
Land Use	Map_MiamiDadeCounty_1888	jpg	1
Land Use	Map_MiamiDadeCounty_1888(2)	jpg	1
Land Use	Map_MiamiDadeCounty_1888(3)	jpg	1
Land Use	Map_MiamiDadeCounty_1890	jpg	1
Land Use	Map_MiamiDadeCounty_1916	jpg	1
Land Use	Map_MiamiDadeCounty_1916(2)	jpg	1
Land Use	Map_MiamiDadeCounty_1917	jpg	1
Land Use	Map_MiamiDadeCounty_1920	jpg	1
Land Use	Map_MiamiDadeCounty_1921	jpg	1
Land Use	Map_MiamiDadeCounty_1925	jpg	1
Land Use	Map_MiamiDadeCounty_1932	jpg	1
	Source_MiamiDade-Parks-MasterPlan	txt	1
Land Use	Parks and Recreation Areas In District 11	docx	2
Zoning	Schools	doc	3
	Websites	txt	3
MDX	FY2012-2016_Work_Program	pdf	3
MDX	FY2013-2017_Work_Program	pdf	11
MDX	Home - MDXWay	pdf	16
MDX	Map_FY2012-2016_Work_Program	pdf	
	CIE-Formap	pdf	
	CurrentMunicipalitiesMDC	pdf	
	LandUse_MapofChanges	pdf	1
	Map_BrownfieldsAreas	pdf	1
Land Use	Map_land-use	pdf	1
Sus Env	Map_MiamiDade-BrownfieldAreas	pdf	1
	Map_MiamiDade-CommissionDistricts2013	pdf	1
	Map1_36x48_A	pdf	1
	Map1_36x48_B	pdf	1
	Map2_24x31	pdf	1
Zoning	Zoning Legend for Map1		1
	36x72_A1	pdf	1
	36x72_A2	pdf	1
	36x72_B	pdf	1
View	_ags_56ca64b4a13e4ea8baf31c0986b580a9	AERIAL	1
View	_ags_3686e2ce658b4209b588a707db1d48ad	AERIAL	1
View	_ags_51059248b54c47fb94457758589b4c43	AERIAL	1
Land Use	land-use-map	jpg	1
Land Use	land-use-map	pdf	1
Land Use	land-use-maplr	jpg	1
Trans	street-map		1

APPENDIX A

LIST OF DOCUMENTS

APPENDIX B

Description	Name	Type	No.
Area	Commission District 1 (11x17)	pdf	
Area	Commission District 2 (11x17)	pdf	
Area	Commission District 3 (11x17)	pdf	
Area	Commission District 4 (11x17)	pdf	
Area	Commission District 5 (11x17)	pdf	
Area	Commission District 6 (11x17)	pdf	
Area	Commission District 7 (11x17)	pdf	
Area	Commission District 8 (11x17)	pdf	
Area	Commission District 9 (11x17)	pdf	
Area	Commission District 10 (11x17)	pdf	
Area	Commission District 11 (11x17)	pdf	
Area	Commission District 12 (11x17)	pdf	
Area	Commission District 13 (11x17)	pdf	
Area	Miami-Dade County Commission District Map		
Area	Draft Maps of Possible Miami-Dade Commission Districts Data Tables		7
Census	Commission District Demographics (8.5x11) 1MB		
Census	Percent Population Change by Commission District (24x36) 1.2MB		
Census	Existing Population by Commission District (8.5x11) 79KB		
Area	2011 Adopted Plan map		
Area	current County Commission District map Revised March 2013		
Area	County Commission District map		
Sus Env	Rock Mining Overlay Map		
Land Use	Map of Vacant Land Inside UDB (1.6 MB)		
Land Use	Parks, Conservation and Vacant Lands Map		
Land Use	1995 Land Use		
Sus Env	1995 Natural Resouce Areas (8.2 MB)		
Land Use	1998 Land Use (7.6 MB)		
Ag Sus	Composite Agricultural Suitability (8.2 MB)		
Ag Sus	Agricultual Suitability - Environmentally Sensitive Areas (8.2 MB)		
Ag Sus	Agricultural Suitability - Wellfields (8 MB)		
	Charette - Flood Zones (2.4 MB)		
	Charette - Road Map		
	DOQQ (1.5 MB)		
Land Use	Existing & Proposed Conservation & Public Lands (8.2 MB)		
	Flood Zones (10.1 MB)		
	Hydrologic Soils Group (9.3 MB)		
Ag Sus/Composite	Lands Under Pressure for Conversion to Non-Agricultural Use - Composite (8.3 MB)		
Ag Sus/Sus Env	Lands Under Pressure for Conversion to Non-Agricultural Use - Environmentally Sensitive Areas (8.2 MB)		
Ag Sus/Infre	Lands Under Pressure for Conversion to Non-Agricultural Use - Major Power Lines (8.3 MB)		
Ag Sus/Trans	Lands Under Pressure for Conversion to Non-Agricultural Use - Traffic Analysis Zone (8.1 MB)		
Ag Sus/Sus Env	Lands Under Pressure for Conversion to Non-Agricultural Use - Wellfield Protection Area (8.1 MB)		
	Municipal Boundaries (8.1 MB)		
	Parcel Acerage (9.3 MB)		
Sus Env	Potential for Flooding - Soil Drainage (9.2 MB)		
	Potential for Flooding - Water Table Elevations (9.6 MB)		
	Public Facilities (8.1 MB)		
Trans	Road Network (8.5 MB)		
	Study Area (8.6 MB)		
Trans	Traffic Analysis Zones (8 MB)		
	Topographic Contours (2.5 MB)		
Sus Env	Water Control Facilities (8 MB)		
Sus Env	Wells, Wellfield Protection Areas & Surficial Aquifer Vulnerability (8.2 MB)		
Land Use	2015-2025 Land Use Plan map (13.5 MB)		
	TOC, Introduction & Statement of Legislative Intent (7.9 MB)		
Land Use	I. Land Use Element (7.5 MB)		
Trans	II. Transportation Element (5.5 MB)		
Housing	III. Housing Element		
Sus Env	IV. Conservation, Aquifer Recharge and Drainage Element		
Infra	V. Water, Sewer and Solid Waste Element		
	VI. Recreation and Open Space Element		
Sus Env	VII. Coastal Management Element		
	VIII. Intergovernmental Coordination Element		
Eco	IX. Capital Improvements Element (5.8 MB)		
	X. Educational Element		
Eco	XI. Economic Element		
Health	XII. Community Health and Design Element		

Description	Name	Type	No.
IMAGES/PHOTOS	Typical Commercial District_	TBS	30
	Neigborhood No. xx - See Plan Key	TBS	14
	Signage - Typical		22
	SR821		34
	SW 117th	TBS	30
	Tamiami Airport	TBS	35
ARTICLES	{CF00A2D1-FCAD-4919-BB91-6381967A80AD} City of North Miami Beach		
	Elizabeth_Plater-Zyberk	PDF	
	Miami Herald STEM Story		
	TheHiddenSTEMEconomy610		
Newsletters	2013-newsletters-april	pdf	
Newsletters	2013-newsletters-february	pdf	
Newsletters	2013-newsletters-june	pdf	
Newsletters	2013-newsletters-march	pdf	
Newsletters	2013-newsletters-may	PDF	
Miami-Dade County | Bureau of Economic and Business Research			
	Census shows fewer seniors in some South Florida cities		
	Harsh recession brings painfully slow rebound for South Florida		
	Florida growth outpaces national trend		
	Census snapshot of S. Florida: Poverty up; wealth down		
	Florida's population grows again after first decline since mid-1940s		
	Dade's population is revised up		
	More Commuters Cross County Lines, Census Finds - Sun Sentinel		
	Miami Matters / Demographics		
	Miami Dade Health Action Network		
	http://www.miamidadematters.org/index.php?module=htmlpages&func=display&pid=5038		
Miami-Dade County - Office of Economic & Demographic Research			
	Census: Miami-Dade ranks high for black-owned firms		
	http://www.bizjournals.com/southflorida/stories/2006/04/17/daily29.html?page=2		
	GEN NEWS SOURCE		
	http://www.nbcnews.com/id/33659232/ns/us_news-miamidade_county_florida?q=Miami-Dade%20County,%20Florida		
	Miami in Focus: A Profile from Census 2000 | Brookings Institution		
SURVEYS	Boynton Beach High School Charette Summary	pdf	
	Historic-High-School-Survey-Results_03212011-FINAL	pdf	
STUDIES	Economic Contribution of FIU 2010	PDF	
	Dist 11 Foreclosure 4-2011	PPT	
Metropolitan Plolcy Program			
	TheHiddenSTEMEconomy610	pdf	
	UF Innovation Square Research Park|Downtown Gainesville|Conference Facility copy		
STAKEHOLDERS	EYE ON MIAMI 2013-04-14	pdf	
	LOBBYISTREGISTRATIONLIST2011	pdf	
	EYE ON MIAMI 2013-04-14	pdf	
	LOBBYISTREGISTRATIONLIST2011	pdf	xlsx
Data/GIS	Dist 11 Data - Comparitive Cities		xlsx
	comparativeAnalysis		
	EAR_Amendments_Workshop	pdf	
EAR	ear-based-amend-entire-te-element-all-subelements	pdf	
EAR	ear-based-amend-signed-cm-element	pdf	
EAR	ear-based-amend-signed-eco-element	pdf	
EAR	ear-based-amend-signed-ice-element	pdf	
EAR	ear-based-amend-signed-lu-element	pdf	
EAR	ear-based-amend-signed-ros-element	pdf	
EAR	ear-based-amend-signed-ws-element	pdf	
Sus	FloridaBrownfields_RedevevopmentProgram	pdf	
Health	HealthSnapshot_District_11_2012	pdf	
	List of Facilities_District11	pdf	
	Miami-Dade County MapStats from FedStats	pdf	
Health	MiamiDadeCounty_HealthProfile_2007	pdf	
	FIUGISCenter_Guide_For_Student_Software_Installation_02132013	Software Guides	

Description	Name	Type
Demo/Census	ADULTCAREFACILITY.ZIP	GIS
Demo/Census	ADULTLIVINGFACILITY.ZIP	GIS
Demo/Census	BIKELANE.ZIP	GIS
Demo/Census	BLOCK10POP.ZIP	GIS
Demo/Census	COMMUNITYBASEDORGANIZATION.ZIP	GIS
Demo/Census	DAYCARE.ZIP	GIS
Demo/Census	DCFFACILITY.ZIP	GIS
Demo/Census	DESIGNATEDPLACE10POP.ZIP	GIS
Demo/Census	GEOADDRESS.ZIP	GIS
Demo/Census	INTERMEDIATECAREFACILITY.ZIP	GIS
Demo/Census	NURSINGHOME.ZIP	GIS
Demo/Census	PAVEDPATH.ZIP	GIS
Demo/Census	PAVEDSHOULDER.ZIP	GIS
Demo/Census	PORT_LINE.ZIP	GIS
Demo/Census	PORT_POLY.ZIP	GIS
Demo/Census	PORTS.ZIP	GIS
Demo/Census	TRACT10POP.ZIP	GIS
Demo/Census	WIDECURBLANE.ZIP	GIS
	fzdefaults.xml.example	Filezilla Info
	filezilla.exe	Filezilla Info
	fzputtygen.exe	Filezilla Info
	fzsftp.exe	Filezilla Info
	fzshellext_64.dll	Filezilla Info
	fzshellext.dll	Filezilla Info
	GPL.html	Filezilla Info
	mingwm10.dll	Filezilla Info
	NEWS	Filezilla Info
	defaultfilters.xml	Filezilla Info
	dialogs.xrc	Filezilla Info
	down.png	Filezilla Info
	dropdown.png	Filezilla Info
	finished.wav	Filezilla Info
	leds.png	Filezilla Info
Dist 11 Information		
	Copy of CD 11 Sub Area Stats 26apr2013.xlsx	
Map	FPL Map1	pdf
Census	Gmail - Fwd_ Elderly, Youth & Poverty Statistics by Zone.pdf	
Trans	West KendallProposedTransmission Corridor.pdf	
	Limonar Exh 36	
Census/Maps	profile_commission-district-11.pdf	maps, census data
PRESENTATIONS	Presentation Summary 08 19 13	
	MASTER PLAN FOR THE DISTRICT 11 DEVELOPMENT	
	Dist 11_Schedule_01 Sheet1	
Miami-Dade Data	2010: Hispanic-Owned Businesses	
Census	2007: Wages	
Census	2011: Black Owned Businesses in Miami-Dade	
Census	2010: Women Owned Businesses in Miami-Dade	
Census	2010: Decade of Changes in Miami-Dade Business Patterns	
Census	2010: Analysis of Miami-Dade Industry Clusters	
Census	2007-2009: Analysis of Miami-Dade Business Patterns	
Census	2007: Profile of Black Owned Businesses in Miami-Dade	
Census	2007: Profile of Women Owned Businesses in Miami-Dade	
Census	2007: Profile of Hispanic Owned Businesses in Miami-Dade	
Census	1998-2006: Analysis of Miami-Dade Industries	
Census	2007: Population	
Census	2008: Education	
Census	2008: Household Structure	
Census	2008: Domestic Migration	
Census	2009: Population Profiles	
Census	2011 Commission District Census Profiles	
Census	2013: Education	
Census	2013: Asian Population Growth in Miami-Dade	
Census	2012: Miami-Dade is the Seventh Most Populous U.S. County	
Census	2011: Hispanics by Country of Origin in Miami-Dade	

Description	Name
Census	2010: Population Estimates for Miami-Dade
Census	2010: Miami-Dade Census Participation Rates
Census	2010: Geographic Mobility (Movers) in Miami-Dade
Census	2009: Domestic Migration and Population Growth
	Zip Codes Map (2 MB)
	Major Streets and Urban Development Boundary (2002)
	Major Streets and Urban Development Boundary
	Map of Miami-Dade County municipalities (3 MB)
Census	Demographic Profile: Broward, Miami-Dade, Palm Beach and Florida (8.7 MB)
	Tamiami
	Kendall
	Kendall West
	Full Report (3.3 MB)
Zoning	Executive Summary of the Leisure City / Naranja Lakes Charrette Report (5.7 MB)
Zoning	Leisure City Community Urban Center Zoning District Regulations (LCUC District) (10.2 MB)
ZONING	Standard Urban Center Zoning Regulations
Zoning	Downtown Kendall Executive Summary (3.0 MB)
Zoning	Downtown Kendall Urban Center (DKUC) District (1.5 MB)
Zoning	East Kendall Charrette Report part 1 (10.8 MB)
Zoning	East Kendall Charrette Report part 2 (9.6 MB)
Urb Des	Urban Design Manuals Volume I (25 MB)
Urb Des	Urban Design Manuals Volume II (11 MB)
Landscape	Landscape Manual (Updated - Draft) (31 MB)
Landscape	Landscape Manual (Adopted) (4 MB)
Sus Env	green.miamidade.gov
Sus Env	GreenPrint -- Our Design to a Sustainable Future
Sus Env	Water Conservation Program website
Sus Env	Sustainable Buildings Program Annual Report 2010-2011 (4/11/2012)
Sus Env	Sustainable Capital Improvement Process Guidelines & Recommendations (9/19/2011)
Sus Env	Miami-Dade Sustainable Development & Building Code
	Project Code Diagnosis Report and Priority Recommendations (8/2011)
Sus Env	Southeast Florida Regional Climate Change Compact - First Annual Report (2/24/2011)
Sus Env	Sustainable Buildings Program Annual Report 2009-2010 (2/11/2011)
Sus Env	GreenPrint – Our Design for a Sustainable Future (12/2010)
Sus Env	Resolution No. R-143-10 Voluntary Energy Efficiency and Renewable Energy Program (5/17/2010)
LAND USE	Adopted 2015 and 2025 Land Use Plan Map (13 MB)
LAND USE	Parks, Conservation and Vacant Lands Map (13 MB)
ZONING	2011 (3 MB) Zoning Ord
	SFRTAMDadeMiami.pdf
Census	Miami-dade County, Fl Census Statistics2010 Release

Everglades Coalition http://www.evergladescoalition.org/papers.html

January 2014 - Legislative Priorities 2014
http://www.evergladescoalition.org/PDF/2014%20Legislative%20Agenda%20FINAL.pdf

January 2014 - Resolution: Kissimmee River Restoraion Project
http://www.evergladescoalition.org/PDF/EVCO_Kissimmee_River_Resolution.pdf

January 2014 - Resolution: Merritt Island National Wildlife Refuge Space Complex Development
http://www.evergladescoalition.org/PDF/EVCO_Merritt_Island_Resolution.pdf

February 2014 - Letter: Clean Water Act
http://www.evergladescoalition.org/PDF/EVCO_CWA_Letter_2014.pdf

March 2014 - Resolution: HB 703
http://www.evergladescoalition.org/PDF/EVCO_14_HB703.pdf

March 2014 - Resolution: SB 372
http://www.evergladescoalition.org/PDF/EVCO_14_SB_372.pdf

March 2014 - Letter: FY15 House Energy & Water Appropriation
http://www.evergladescoalition.org/PDF/EVCO_FY15_Approps_House_Energy.pdf

March 2014 - Letter: FY15 House Interior & Environment Appropriations
http://www.evergladescoalition.org/EVCO_FY15_Approps_House_Interior.pdf

March 2014 - Letter: FY15 Senate Energy & Water Appropriation
http://www.evergladescoalition.org/PDF/EVCO_FY15_Approps_Senate_Energy.pdf

March 2014 - Letter: FY15 Senate Interior & Environment Appropriations
http://www.evergladescoalition.org/PDF/EVCO_FY15_Approps_Senate_Interior.pdf

March 2014 - Resolution: Everglades Curriculum
http://www.evergladescoalition.org/PDF/EVCO%20Curriculum%20Reso%20DRAFT.pdf

April 2014 - Letter: Attorney General Bondi - Chesapeake Bay Clean Water Blueprint Amicus Brief
http://www.evergladescoalition.org/PDF/EVCO_ChesapeakeBay_CleanWaterBlueprint
_AmicusBrief.pdf

Description	Name
	April 2014 - Letter: CEPP - USACE Assistant Secretary of the Army Jo-Ellen Darcy http://www.evergladescoalition.org/PDF/USACE%20fed%20EvCo%20Letter%20CWRB%204-28-14.pdf
	April 2014 - Letter: CEPP to President of U.S. http://www.evergladescoalition.org/PDF/POTUS%20EvCo%20Letter%20CWRB%204-28-14.pdf
	July 2014 - Letter: WRRDA http://www.evergladescoalition.org/PDF/Final%20DRAFT%20WRRDA%20Thank%20You%20Letter%202014-1.pdf
	July 2014 - Letter: Senator Nelson - Water Thank You Letter http://www.evergladescoalition.org/Nelson%20Everglades%20Coalition%20Letter_%2007%2011%2014%20edit.pdf
	July 2014 - Letter: Fisheating Creek Comments http://www.evergladescoalition.org/EVCO_FisheatingCreek_Letter_July2014.pdf
	August 2014 - Resolution: WRRDA http://www.evergladescoalition.org/PDF/FINAL%20WRRDA%20Resolution%202014.pdf
	August 2014 - Letter: Call for CERP Interagency Manatee Task Force http://www.evergladescoalition.org/FINAL%20Manatee%20Letter%202014.pdf
	September 2014 - Resolution: Marine Reserve in Biscayne National Park http://www.evergladescoalition.org/EVCO%20Resolution%20Biscayne%20Conservation.pdf
	October 2014 - Resolution: Proposed Sugar Hill Sector Plan in Hendry County http://www.evergladescoalition.org/EVCO_SugarHillResolution_Oct3.pdf
	January - 2020 Vision for the Everglades http://www.evergladescoalition.org/PDF/EvCo2020VisionEvergladesJan10.pdf
Beacon Council	http://beaconcouncilfoundation.org/onecommunityonegoal/
	OCOG Overview Flyer http://miami.beaconcouncil.com/webdocs/ocog/website/ocogflyernovember2013.pdf
	OCOG Overview Powerpoint Presentation ocogpresentationmarch2014.pptx
	OCOG Implementation ocogimplementationtable.doc
	OCOG Target Industry Strategies Report #4 (Full PDF File: 5.9 MB) http://miami.beaconcouncil.com/webdocs/Foundation/targetindustrystrategiesreport.pdf
	Target Industry Strategies Report #4 Executive Summary (Full ODF File: 3.4 MB) http://miami.beaconcouncil.com/webdocs/Foundation/targetindustrystrategiesexecsummary.pdf
	OCOG Education Assets Inventory Report #3 (Full PDF File: 8.1 MB) http://miami.beaconcouncil.com/webdocs/Foundation/educationassetsinventory.pdf
	Education Assets Inventory Report #3 Executive Summary (Full PDF File: 4.7 MB) http://miami.beaconcouncil.com/webdocs/Foundation/educationassetsinventoryexecutivesummary.pdf
	OCOG Target Industries Report #2 (Full PDF File: 12.7 MB) http://miami.beaconcouncil.com/webdocs/Foundation/miamidadetargetindustryreportpdf.pdf
	Target Industries Report #2 Executive Summary (Full PDF File: 7.4 MB) http://miami.beaconcouncil.com/webdocs/Foundation/targetindustriesexecutivesummary.pdf
	OCOG Competitive Assessment Report #1 (Full PDF File: 10.1 MB) http://miami.beaconcouncil.com/webdocs/Foundation/OCOGCompetitiveAssessment.pdf
	Competitive Assessment Report #1 Executive Summary (Full PDF File: 4.6 MB) http://miami.beaconcouncil.com/webdocs/Foundation/competitiveassessmentexecutivesummary.pdf

Research Data

1. US Census Bureau: Population & Demographic Forecasts 2010-2025 (By Metro Area, Block Group).
2. US Census Bureau: Transportation & Travel Patterns (By Metro Area, Block Group).
3. US Bureau of Labor Statistics: Employment, Employment Fore casts by Industry (Metro Area & Zip code Geographies).
4. US Bureau of Labor Statistics: Employment Status Industry (Metro Area & Block Group Geographies).
5. US Bureau of Labor Statistics: Employment & Employers (Establishments) by Size & Industry (Metro Area & Block Group Geographies).
6. Benchmark Comparison: Selected University Research Parks (Various Data Sources)
7. Miami-Dade County Office of the Property Appraiser: Various Statistics Including Property Values, Taxable Value Miami-Dade County.
8. National Association of Home Builders, Metro Area Home Starts Forecast Q3 2013).
9. Miami-Dade County Office of the Clerk of Courts: Various Statistics Including Building Permits, and Foreclosures in Miami-Dade County.
10. RealtyTrac.com: Current Real Estate Listings, Sales Data and Foreclosures, District 11, Q2 – Q3 2013.

Existing Plans

1. Miami-Dade County: Annual Brownfields Report, 2012.
2. Miami-Dade County: Comprehensive Development Master Plan (CDMP), as Amended, 2013).
3. Miami-Dade County: Comprehensive Development Master Plan (CDMP), as Amended, 2013).
4. Miami-Dade Beacon Council: One Community One Goal Strategic Plan.
5. Miami-Dade County: Annual Budget, 2010 through 2013.

Reports & Studies

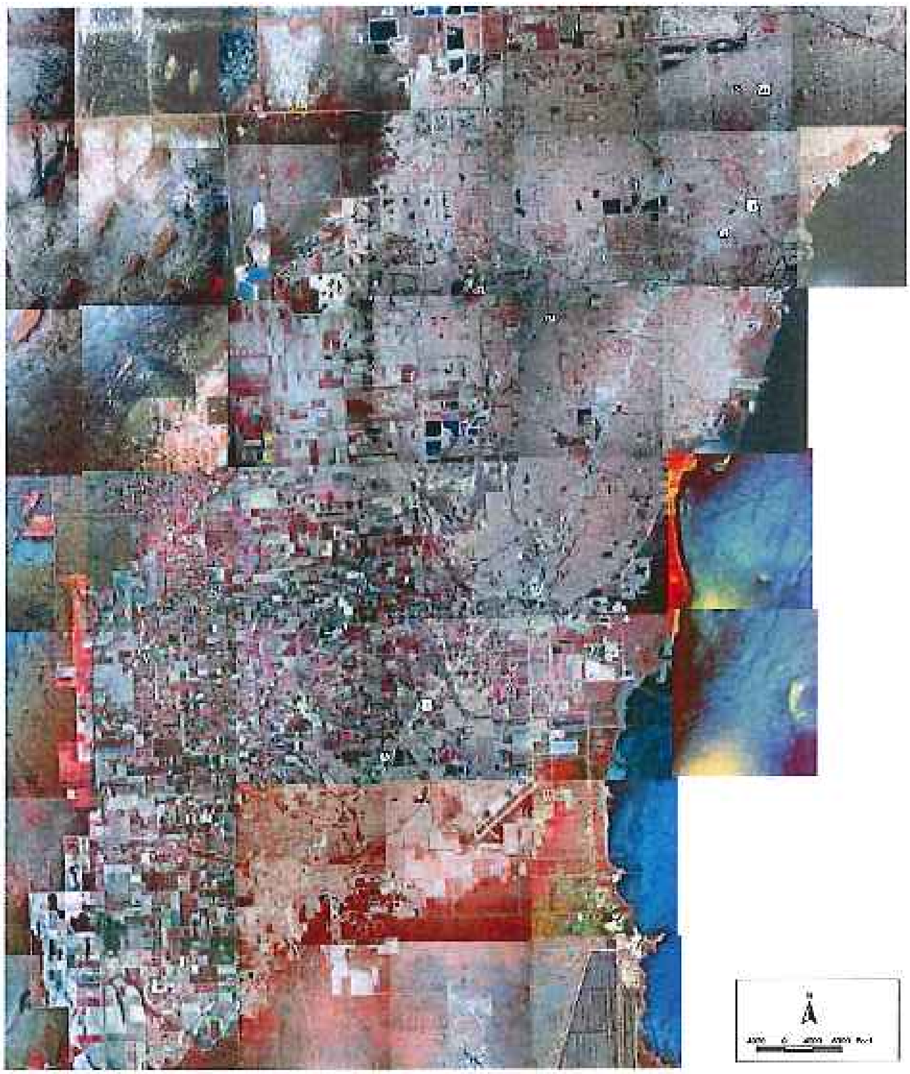
1. US Department of Housing & Urban Development, Office of Policy Development and Research: Comprehensive Housing Market Analysis, Miami-Dade County, 2012.
2. Colliers International: US Market Summary Reports (2009 – 2012).
3. National Association of Home Builders, Division of Survey and Housing Policy Research: What Home Buyers Really Want Survey (2013).
4. The John D. and Catherine T. Macarthur Foundation with Hart Research Associates: How Housing Matters: Americans' Attitudes Transformed By The Housing Crisis & Changing Lifestyles; A National Survey Among Adults.
5. U.S. PIRG Education Fund & The Frontier Group: A New Direction Our Changing Relationship with Driving and the Implications for America's Future (2013).

1. Forbes Innovation Index Rankings 2013 (Metro Areas)
2. The Economist Intelligence Unit: Fostering Innovation-Led Clusters; A Review of Leading Global Practices.
3. Florida International University, Department of Economics: Economic Contribution of FIU, 2010.
4. The Brookings Institute: Building an Innovation-Based Economy.
5. The Brookings Institute: The hidden STEM Economy (June 2013).

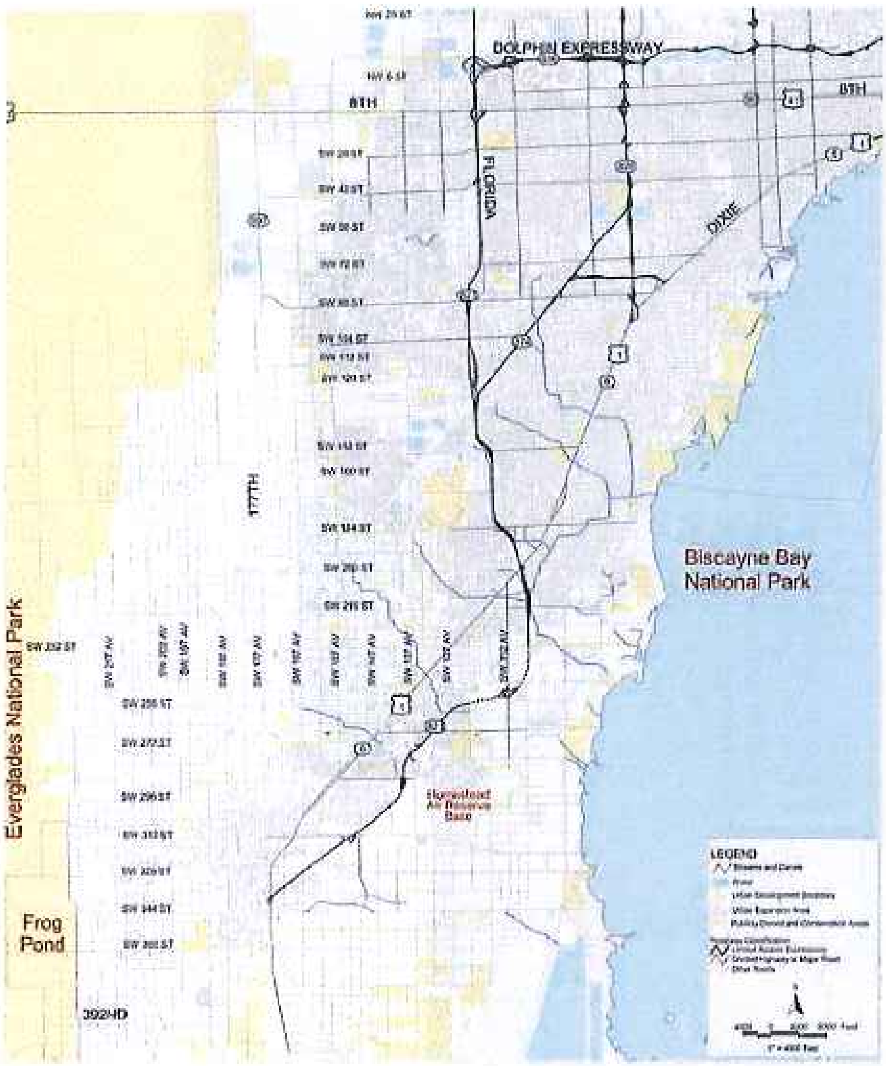
APPENDIX B

MAPS

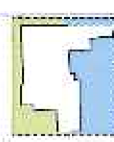
Map 01.00 *South Florida Satellite View.*

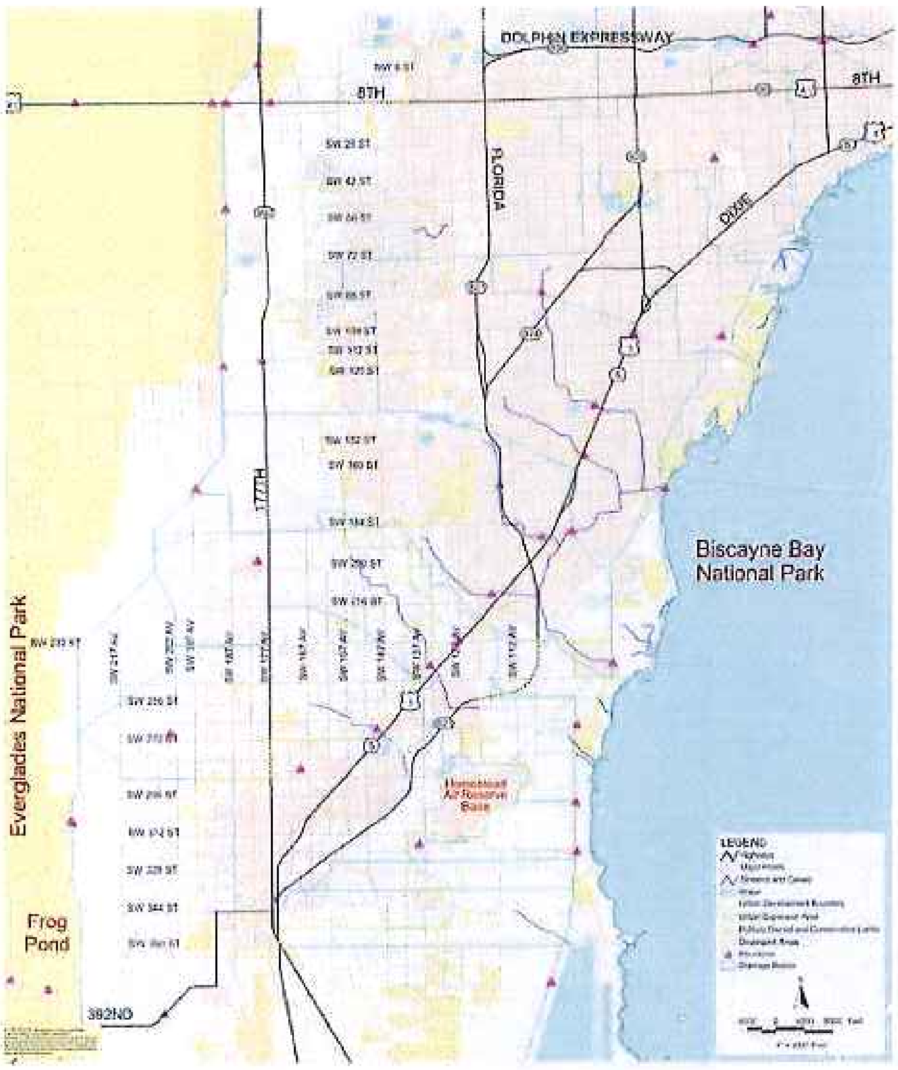


Map 02.00 *Miami-Dade Agricultural Project, 1995*

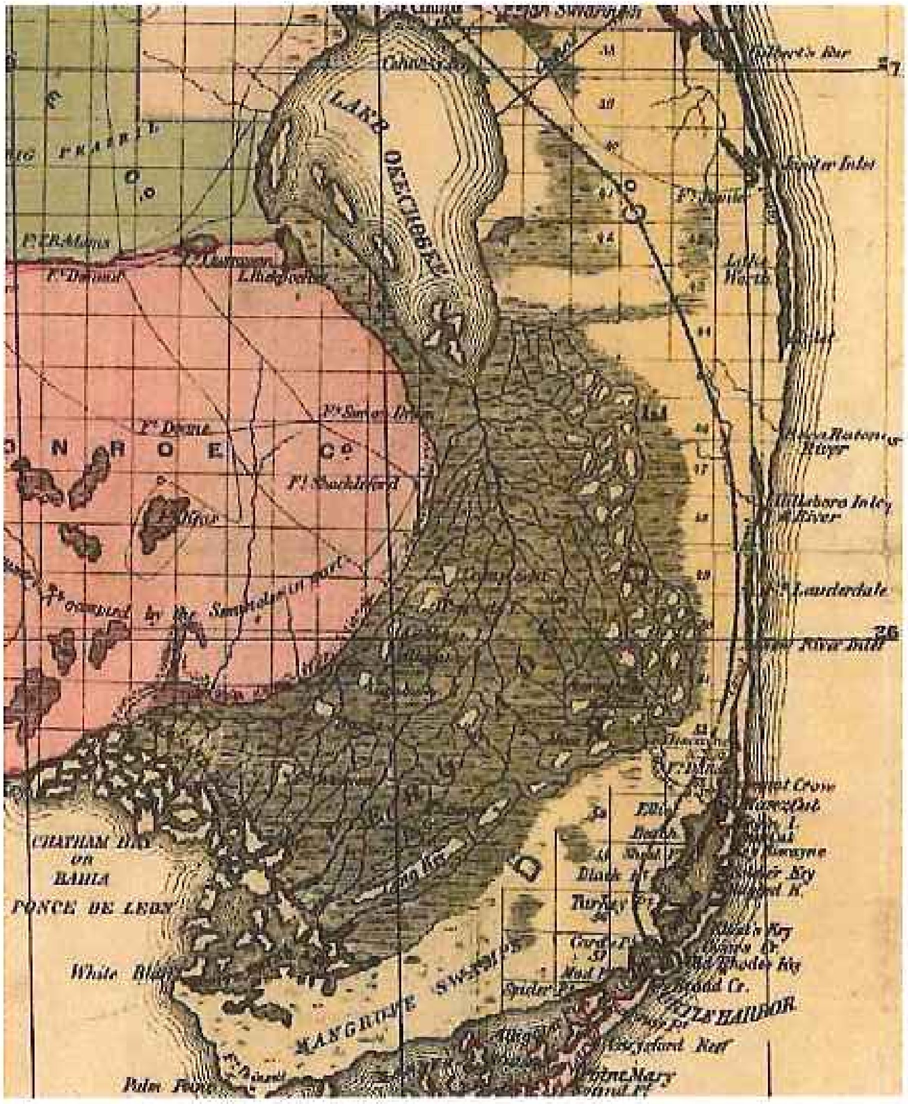


Map 01.00 *Road Ways Miami-Dade County*

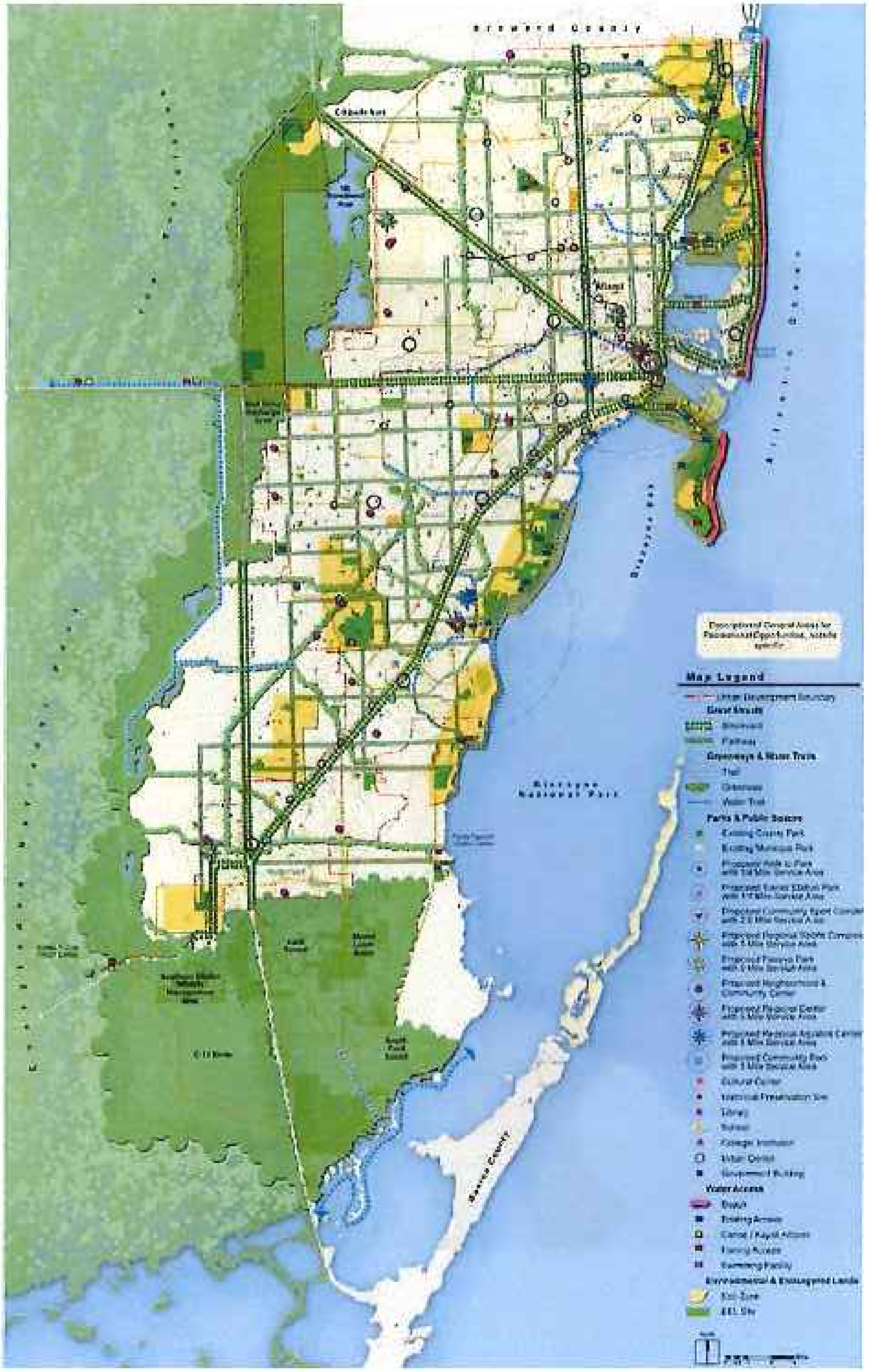




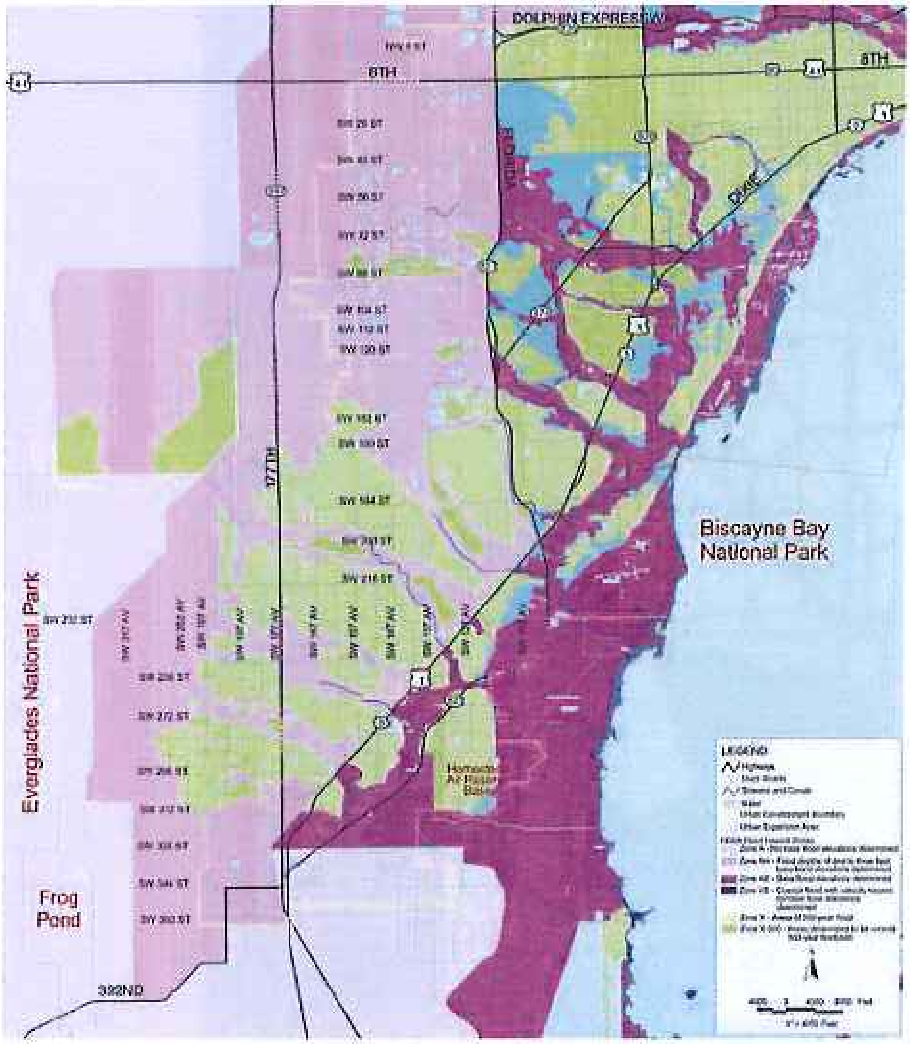
Map 02.00 *Water Control Facilities Miami-Dade County*



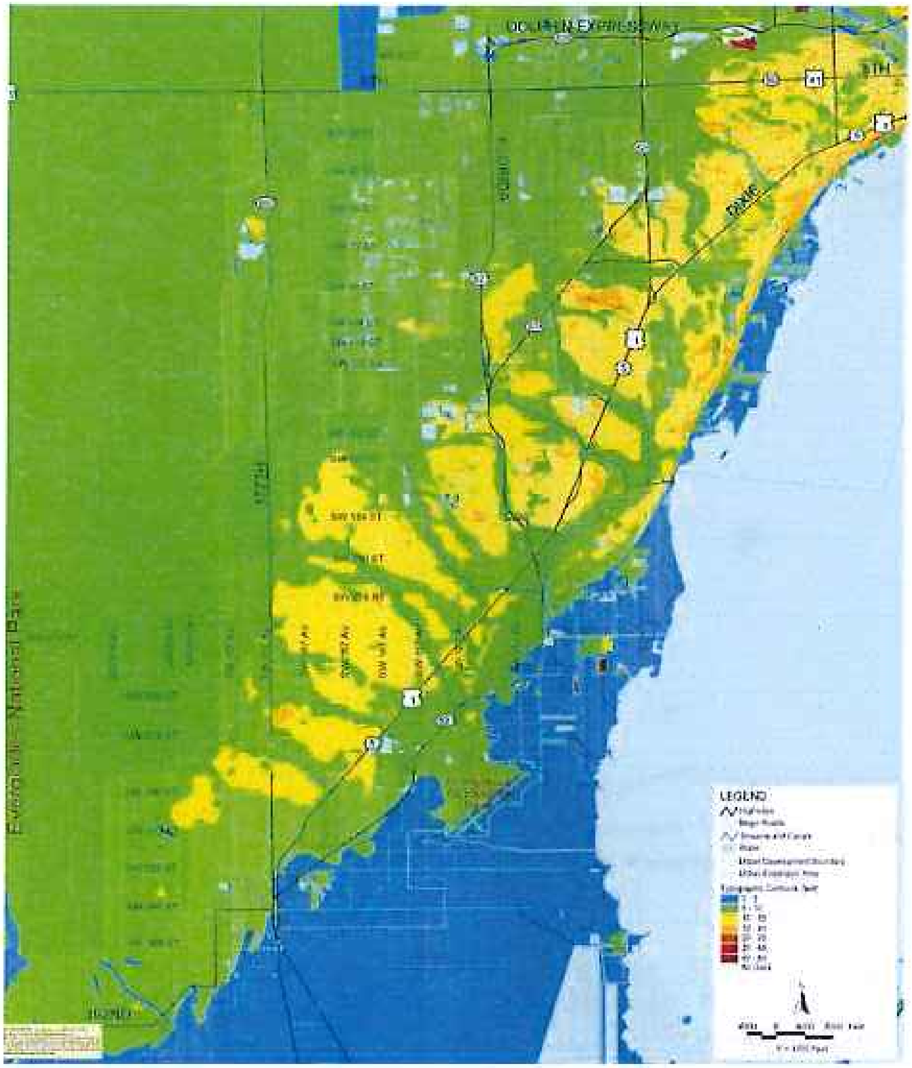
Map 01.0 *Miami-Dade County 1874*



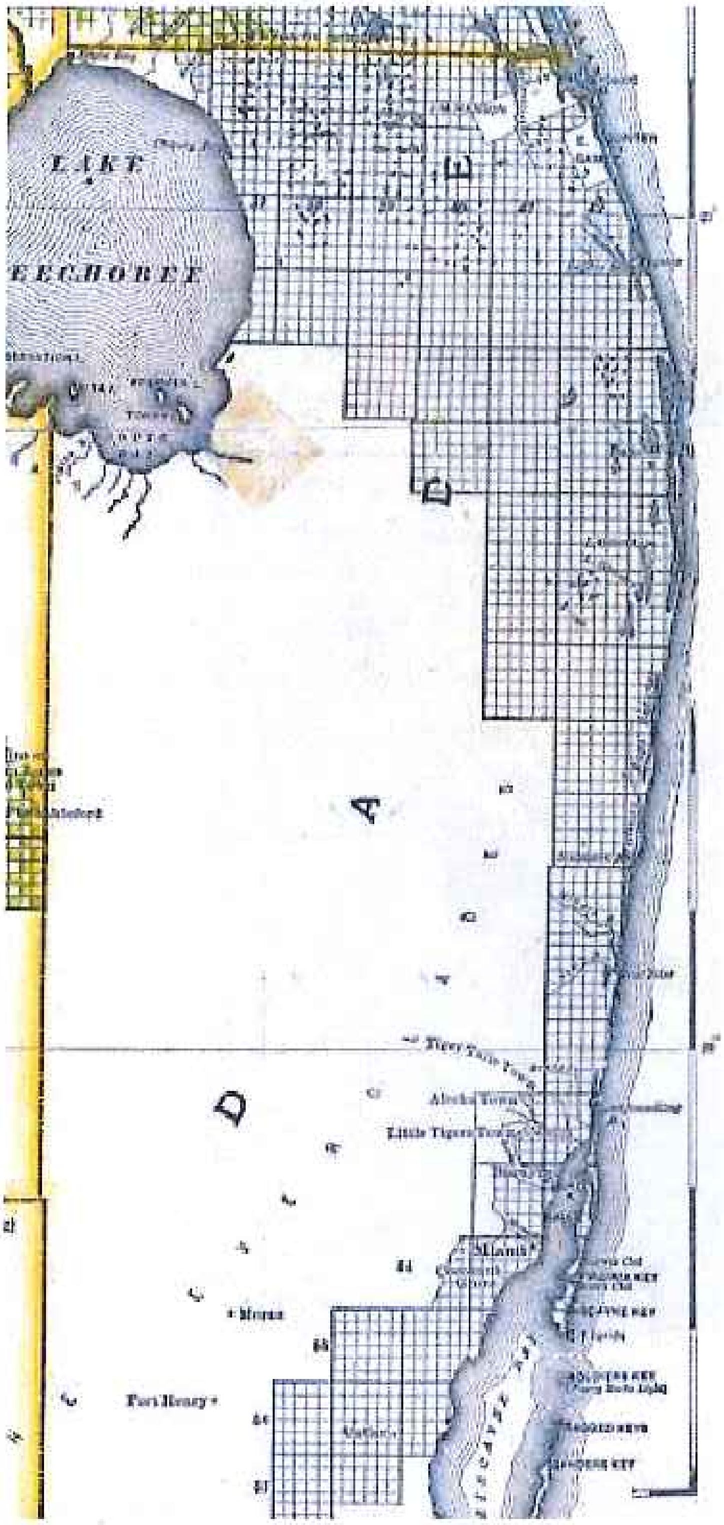
Map 02.00 *Miami-Dade Parks Master Plan*



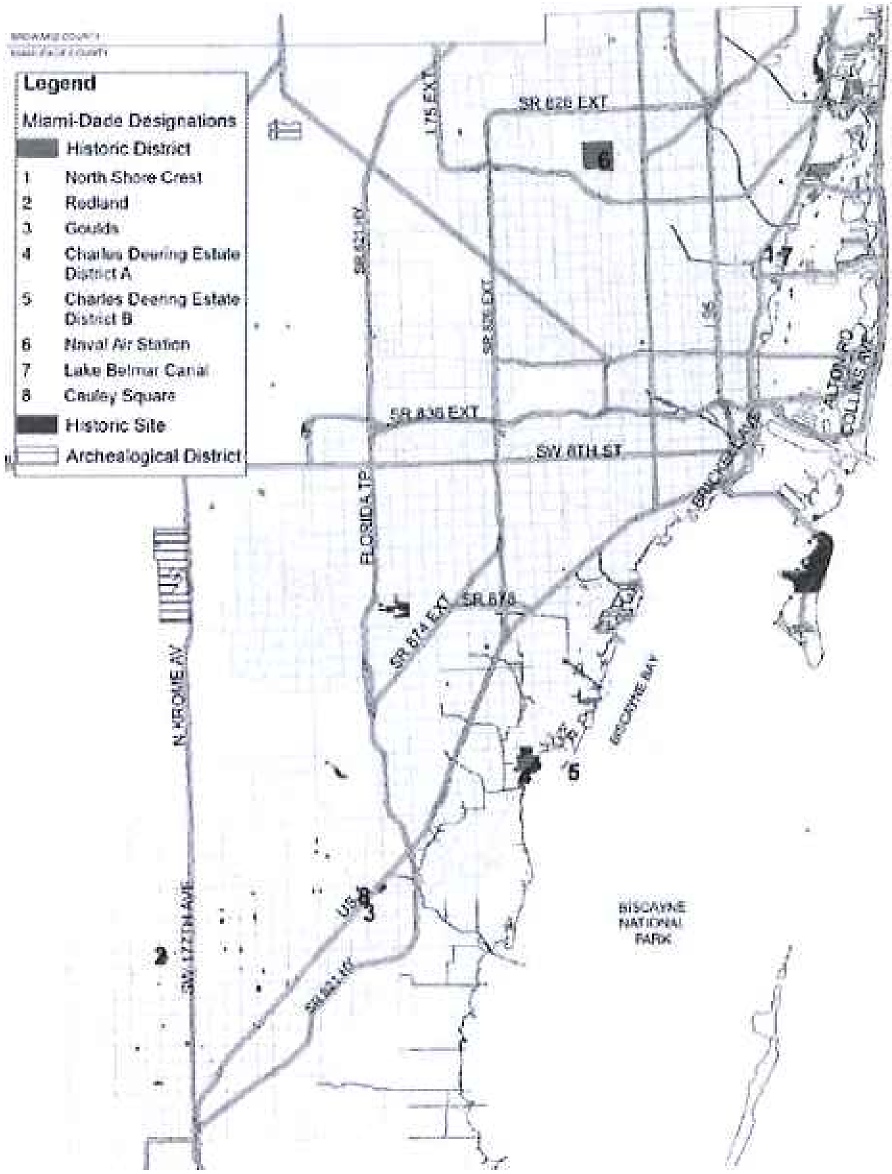
Map 01.00 *Sea-Level Rise Miami-Dade County*



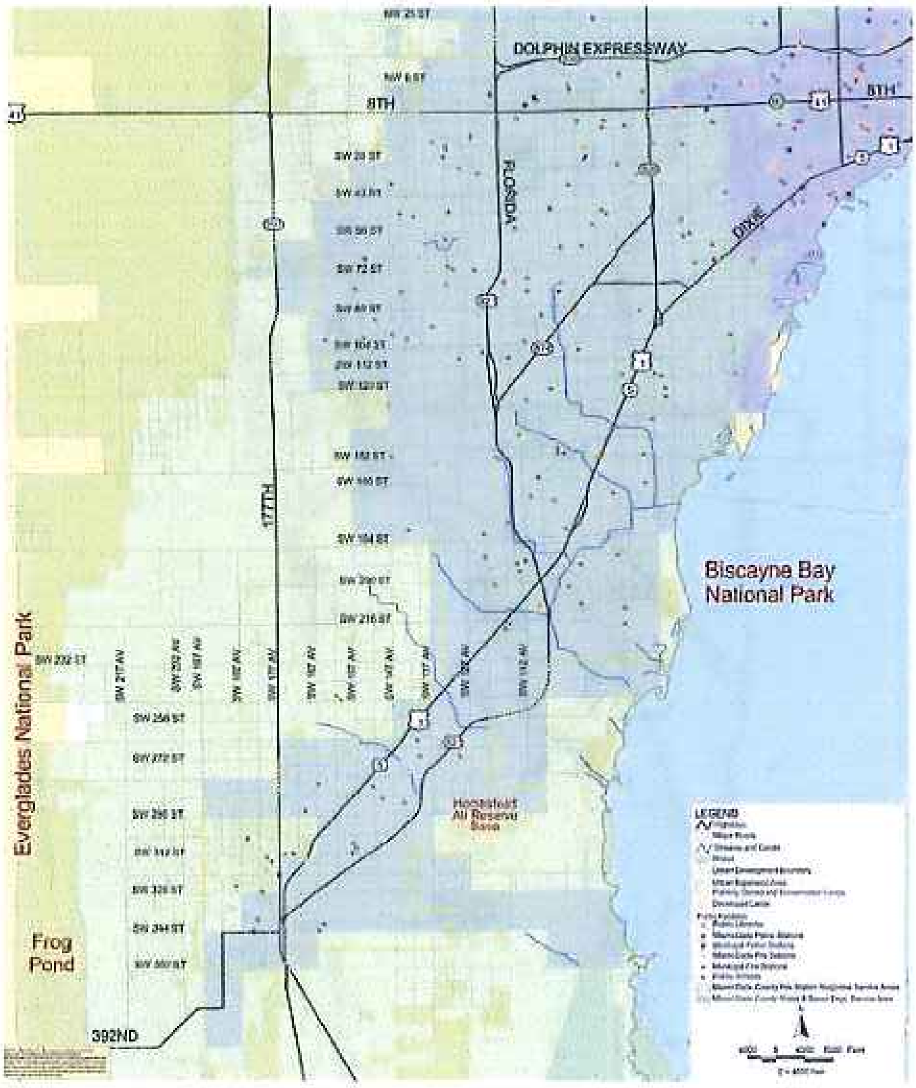
Map 02.00 *Topographic Contours Miami-Dade County*



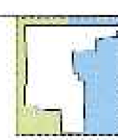
Map 01.00 *Topographic Contours Miami-Dade County*

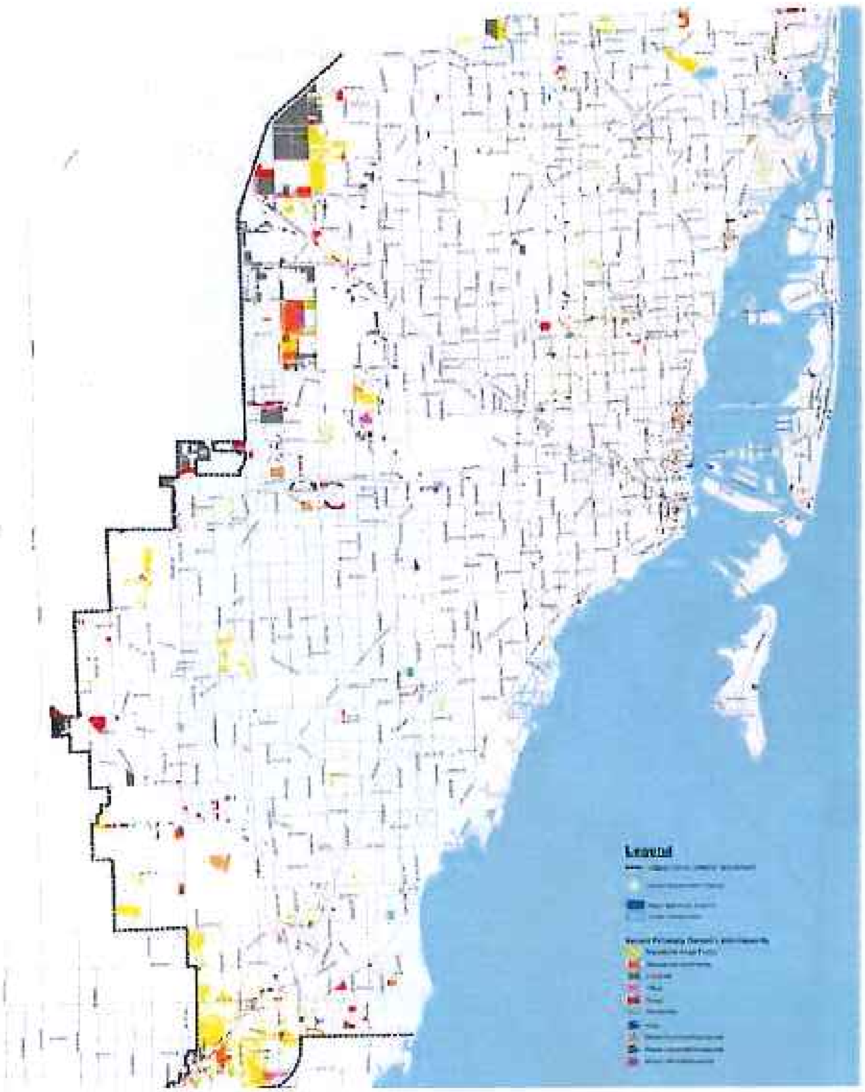


Map 02.00 *Miami-Dade Historic Conditions Map*

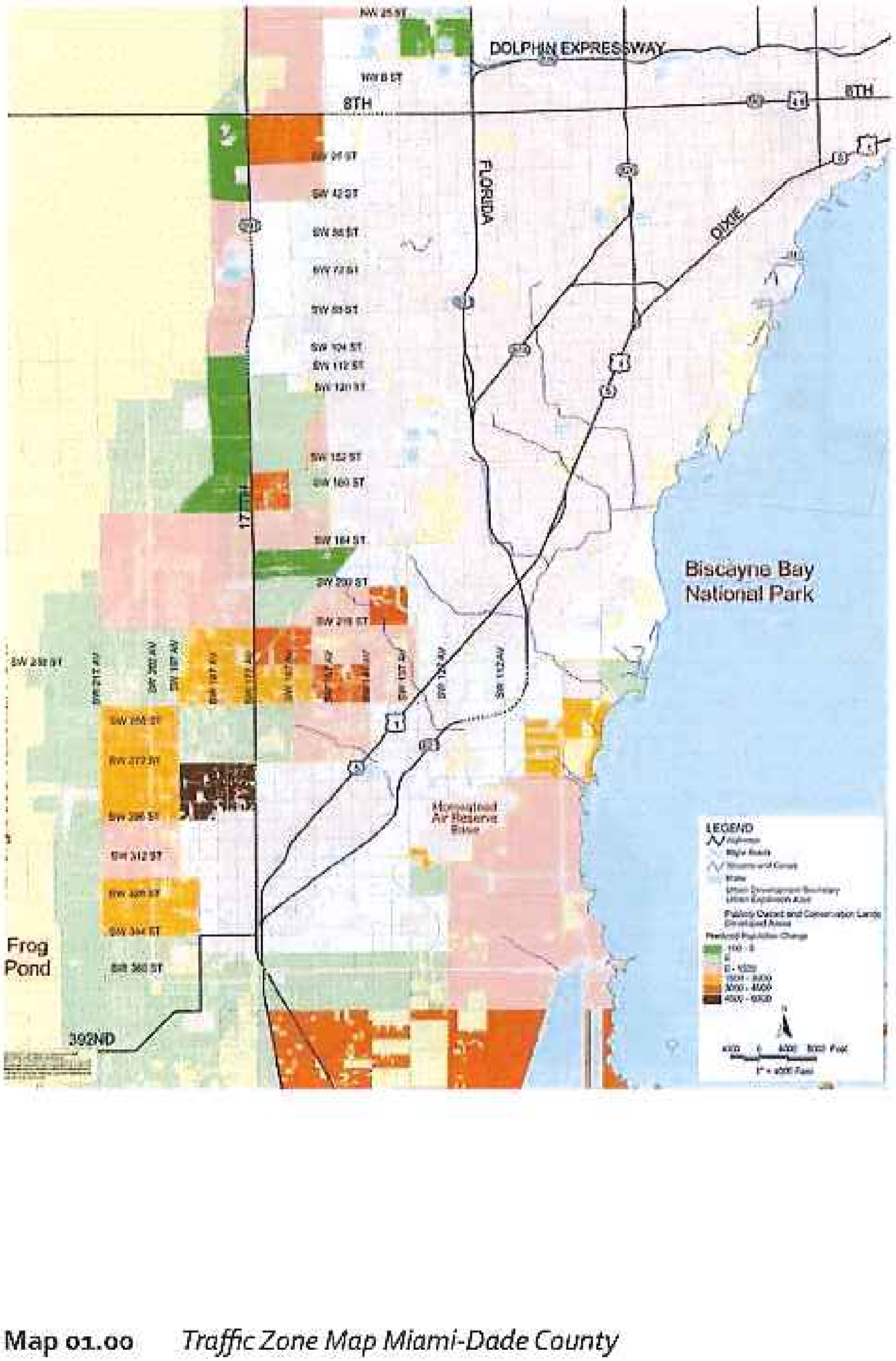


Map 01.00 *Public Facilities Miami-Dade County*



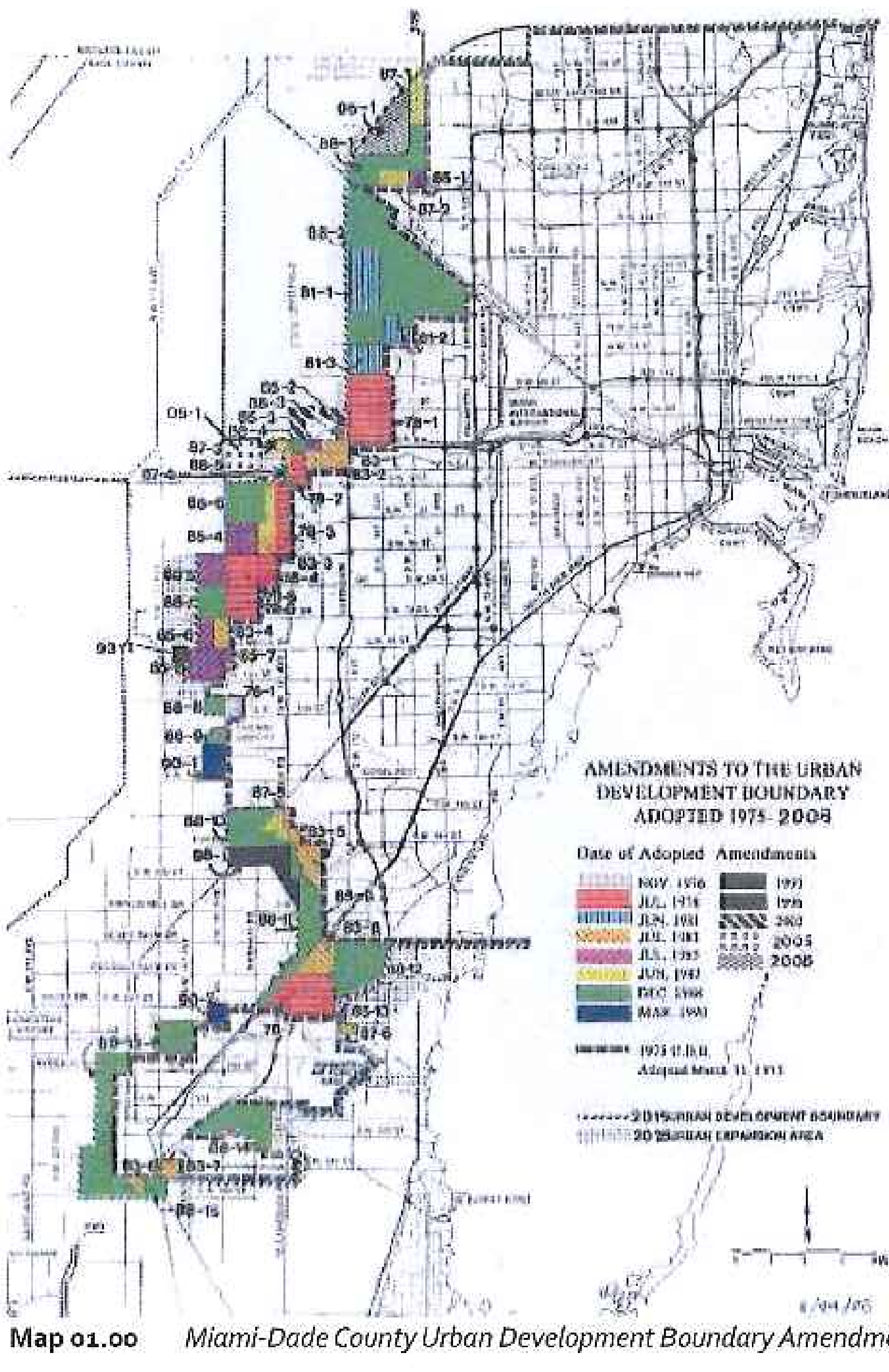


Map 01.00 *Vacant Land by Zoning-Use Miami-Dade County*

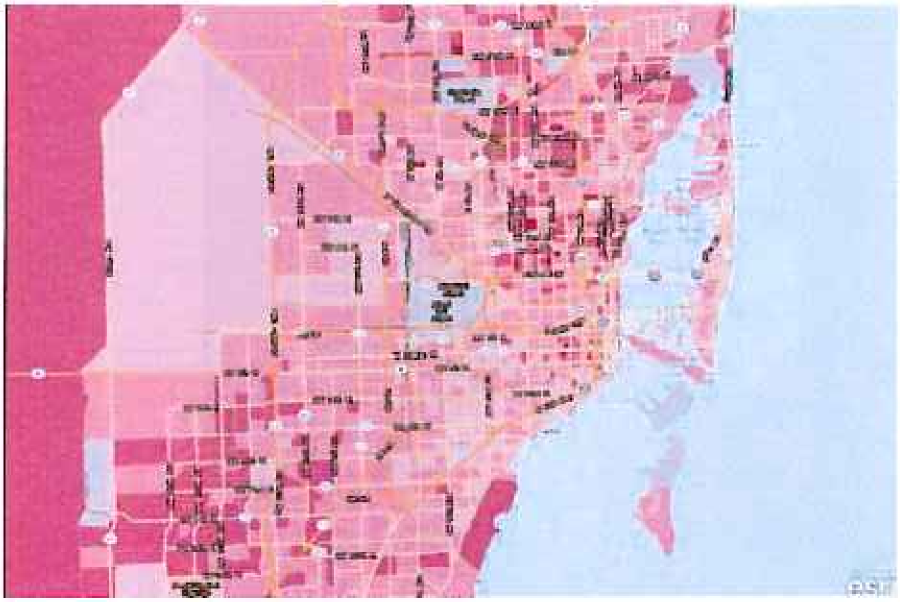


Map 01.00 *Traffic Zone Map Miami-Dade County*

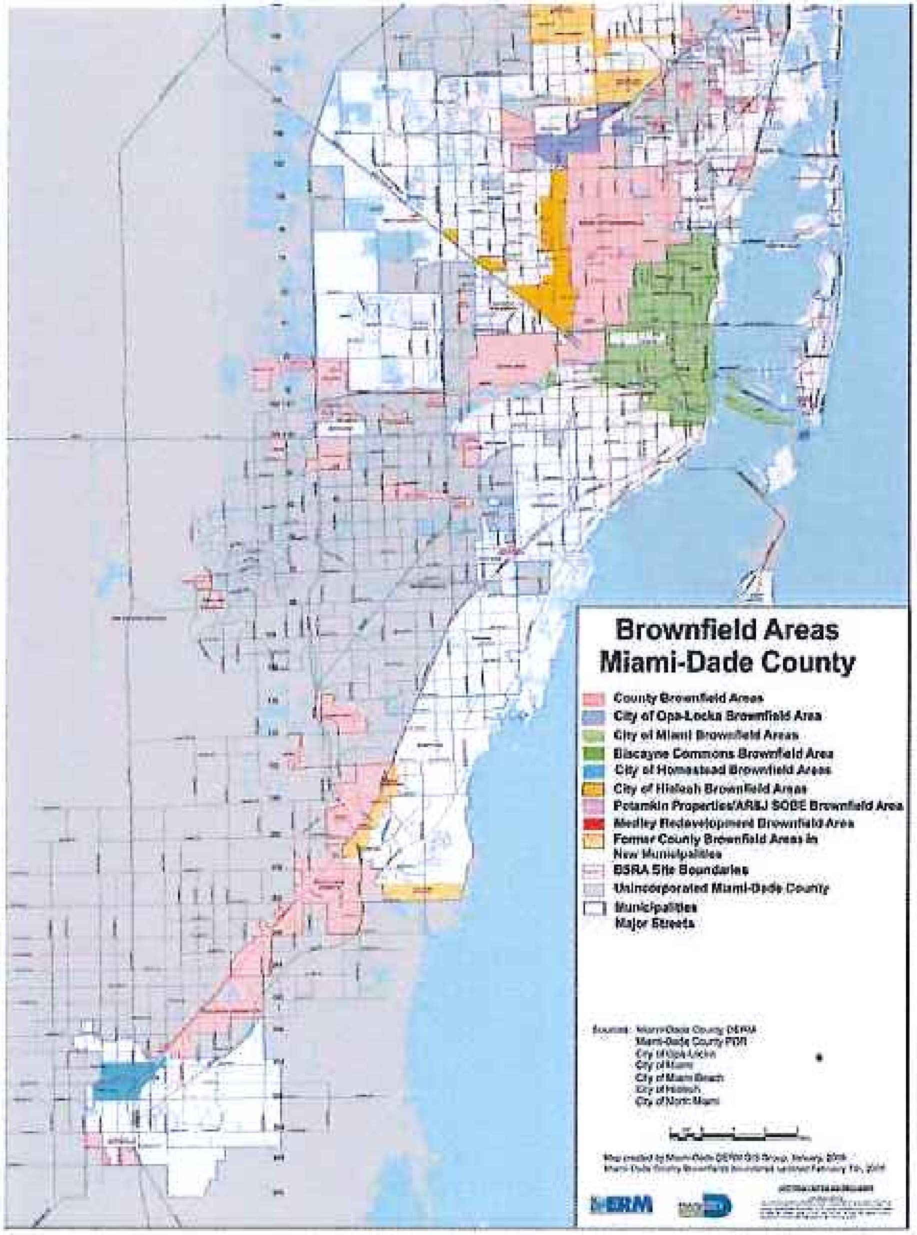
Map 02.00 *Transit Routes Miami-Dade County*



Map 01.00 *Miami-Dade County Urban Development Boundary Amendments*

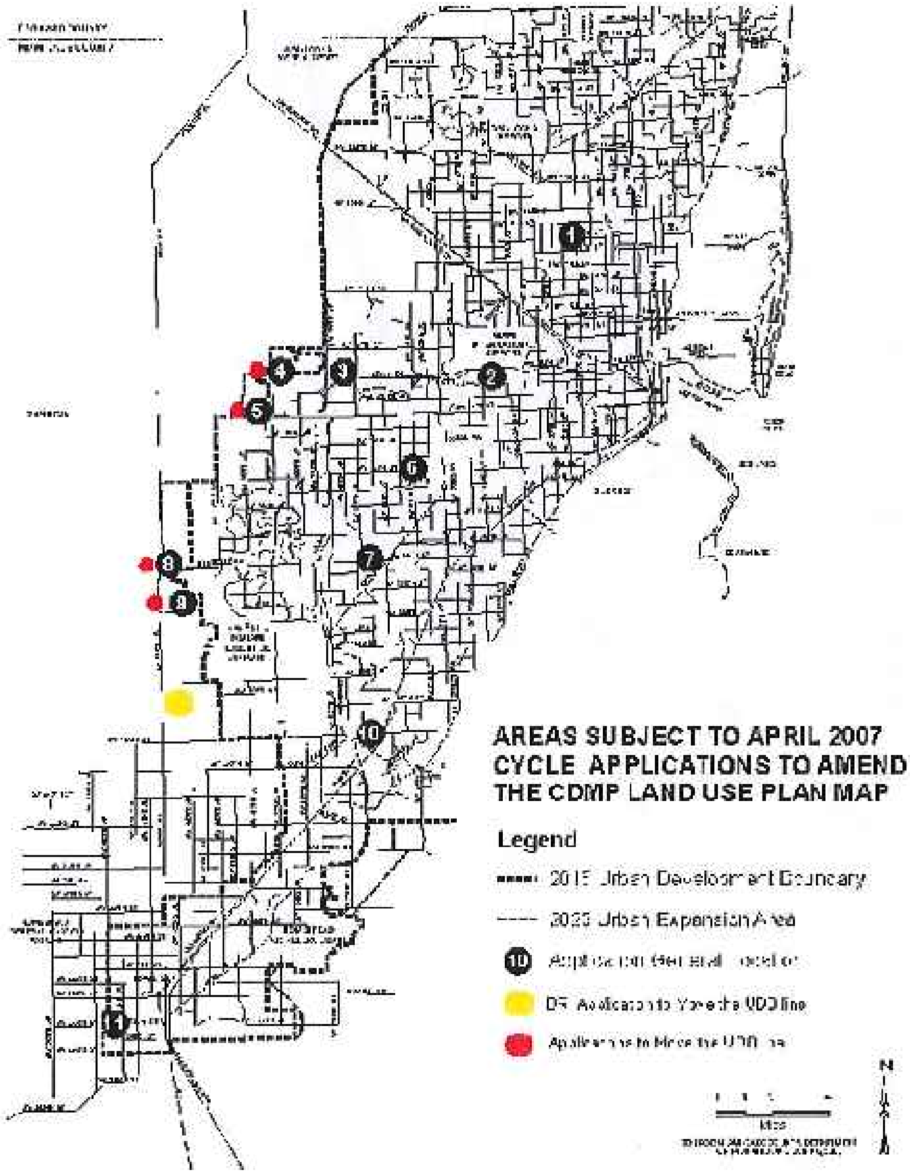


Map 02.00 *Miami-Dade, Map of Average Travel Time to Work*

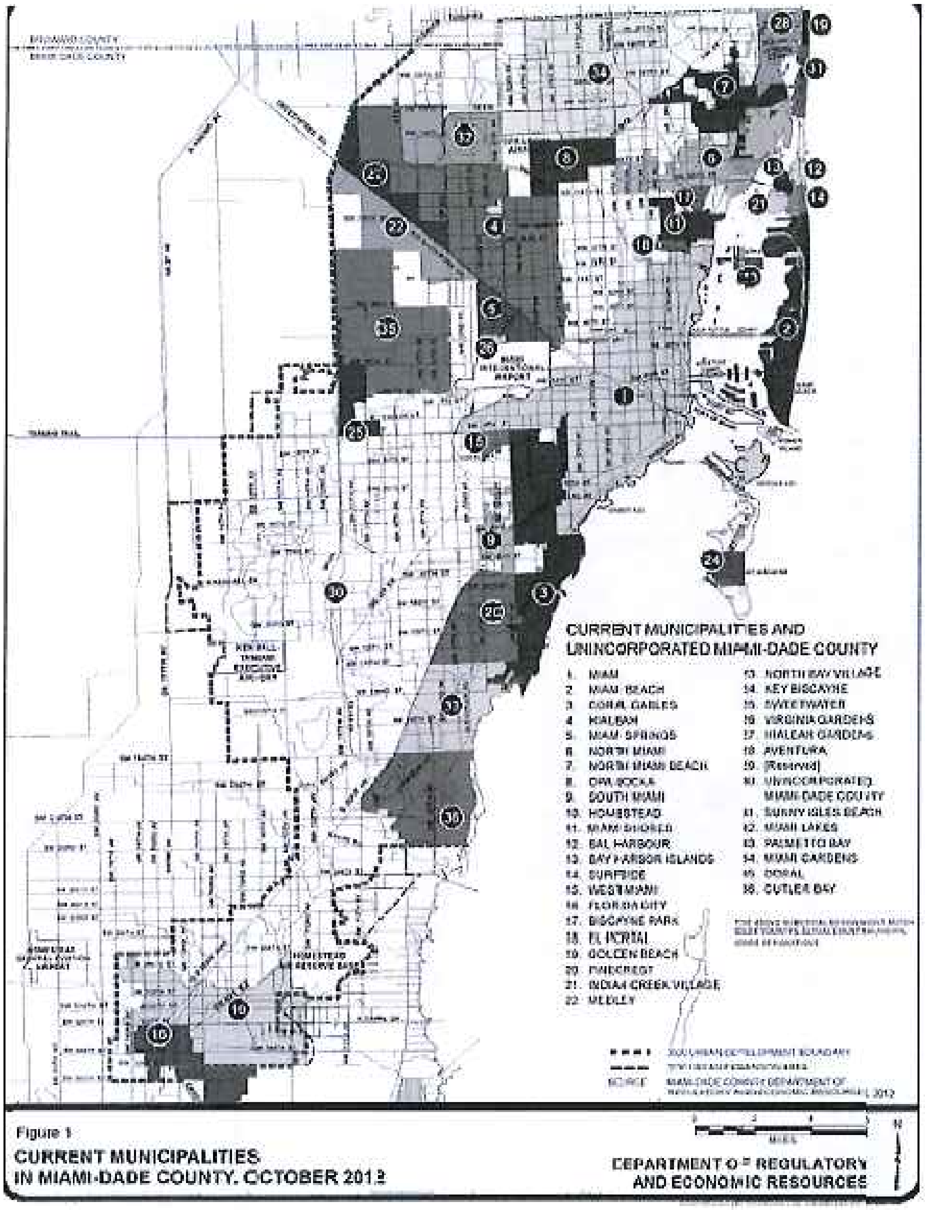


Map 01.00 *Miami-Dade Brownfield Areas Map*

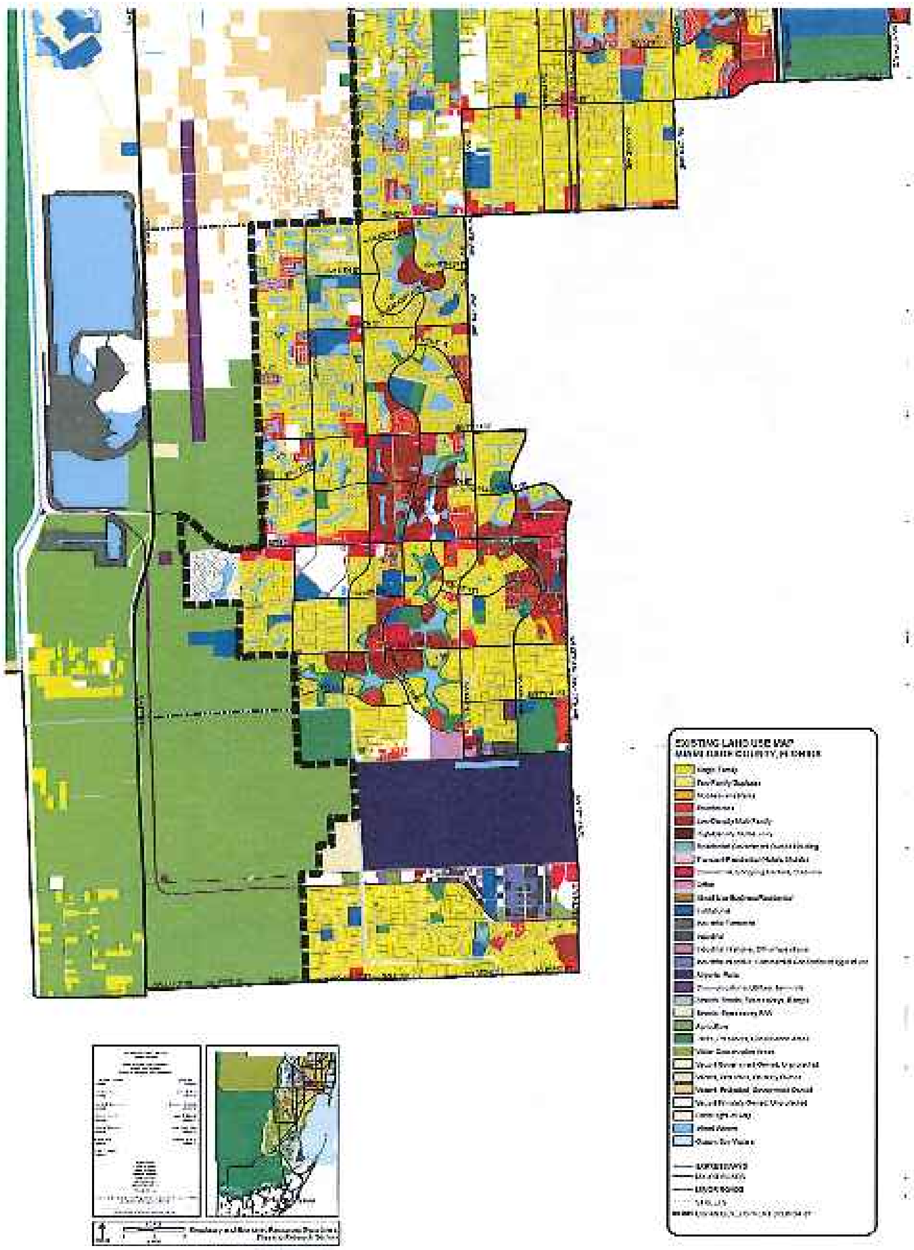
Map 02.00 *MPO near Term Transportation Plan 2010*



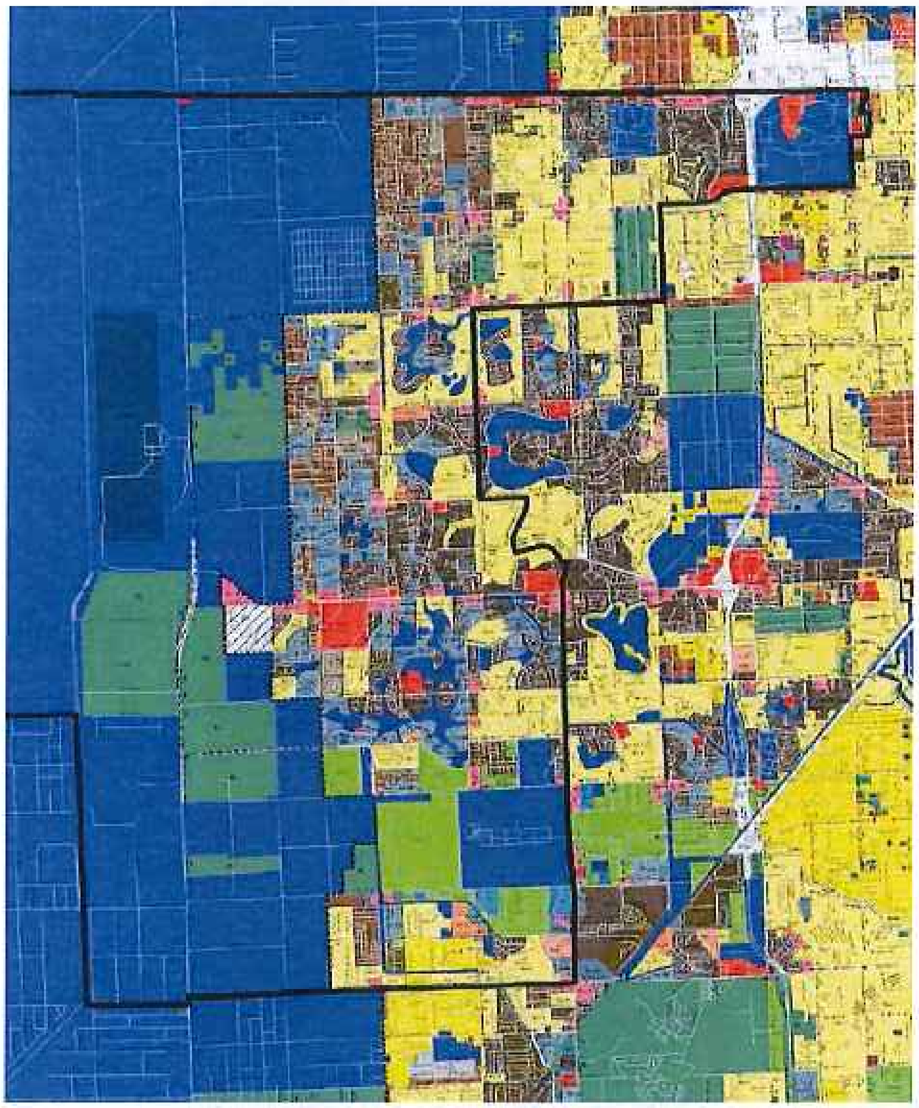
Map 01.00 Ammendment areas for *CMPD Land Use Plan Map, April 2007*



Map 02.00 *Current Municipalities in Miami-Dade County, October 2006*



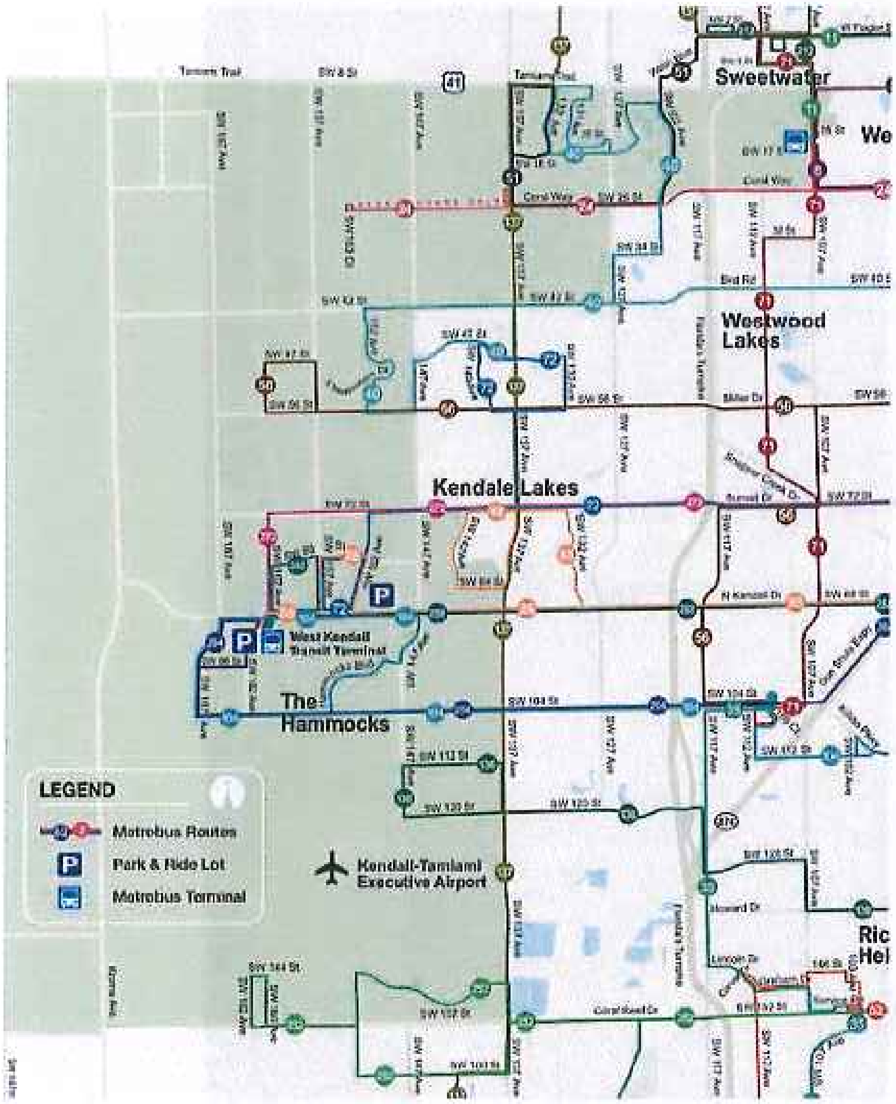
Map 01.00 *District 11 Existing Land Use*



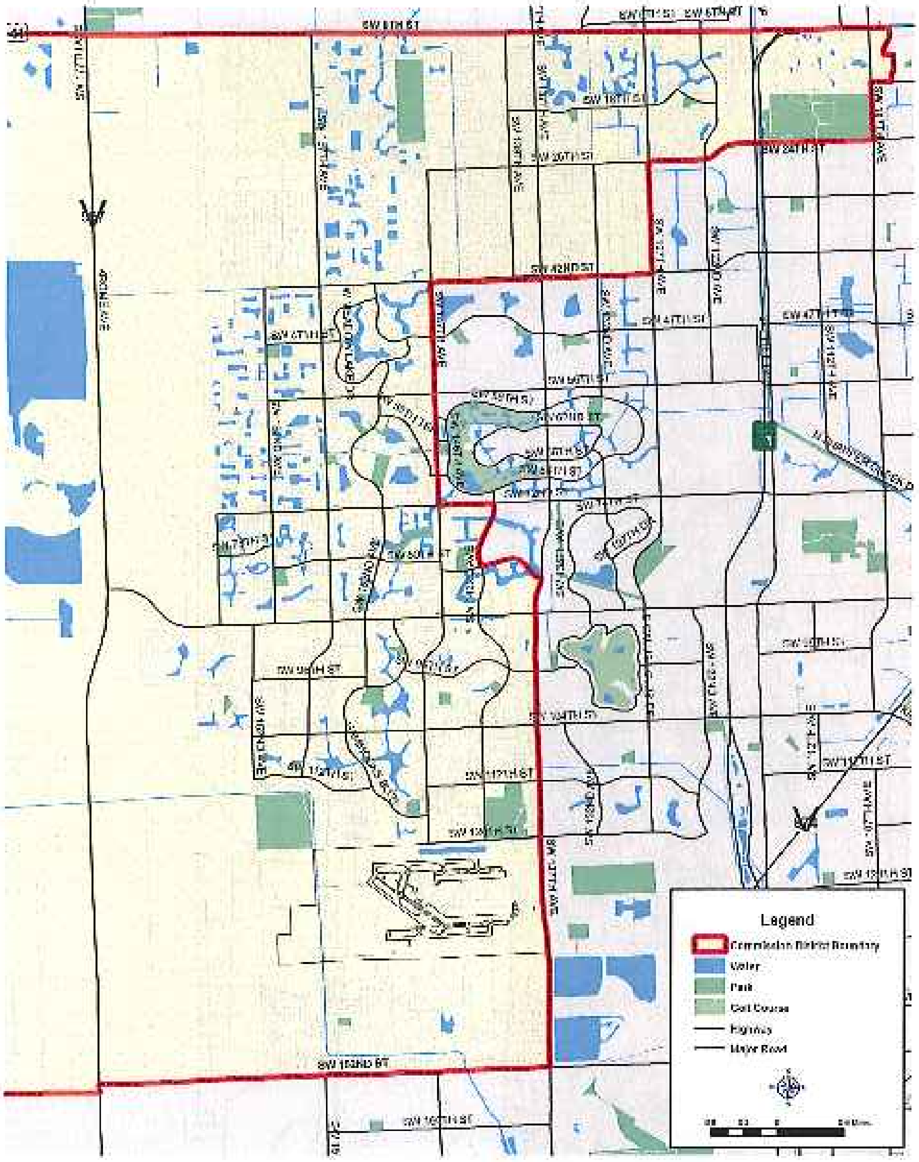
Map 02.00 *Unincorporated Zoning Districts*
Miami-Dade County Commission District 11

Map 01.00 *Project 836 Kendall Extension*

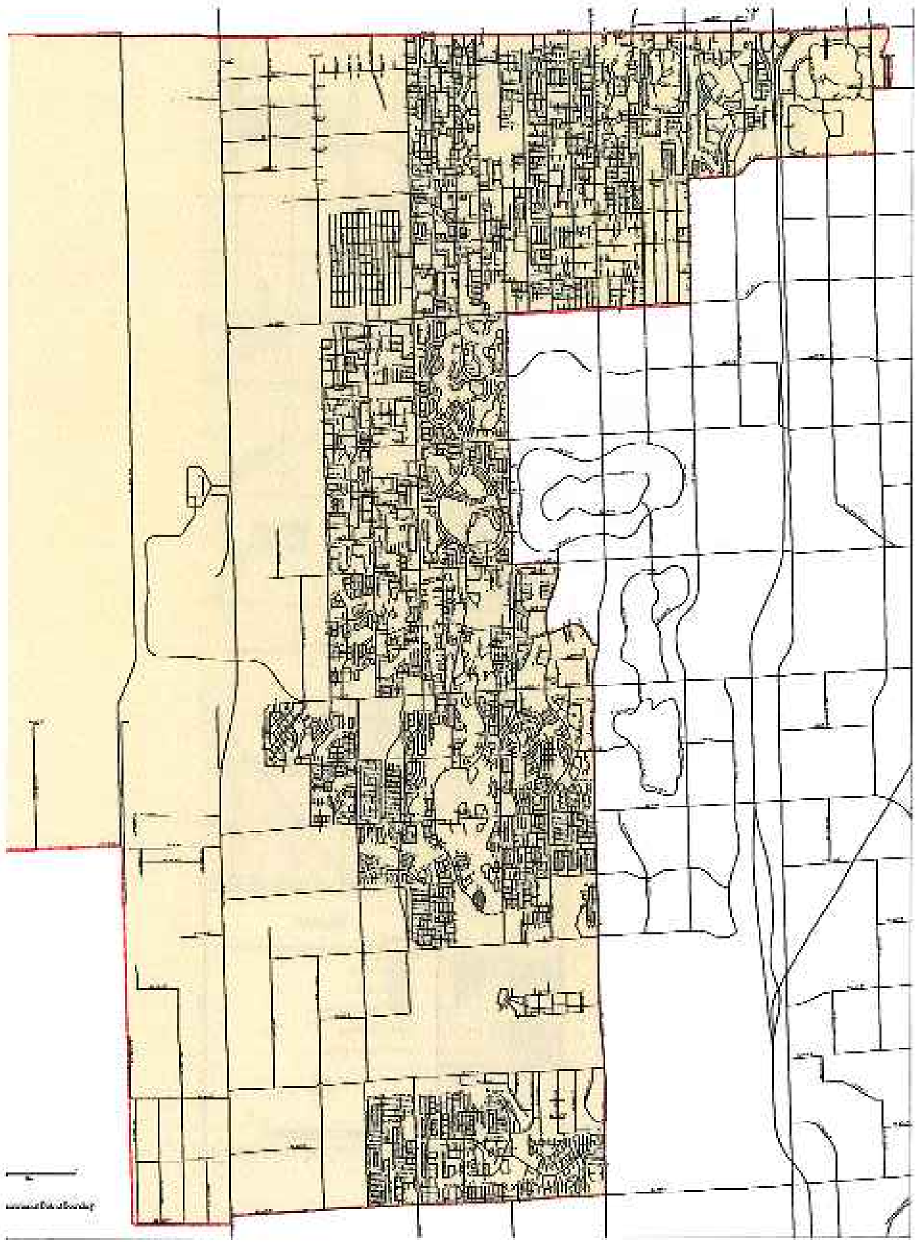
Map 02.00 *MDX Kendall Extension Master Plan*



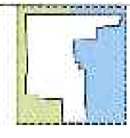
Map 01.00 *Metrobus Routes Serving Miami-Dade County Commission District 11*

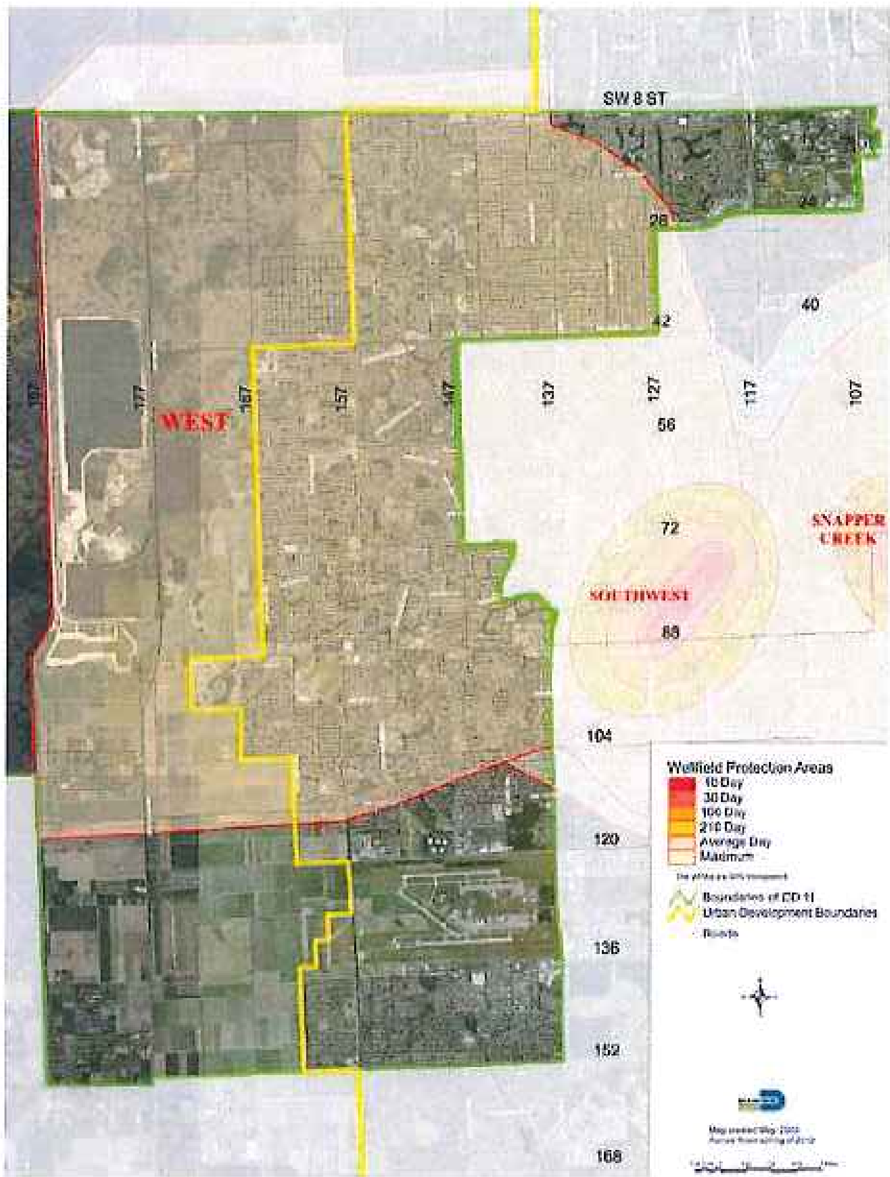


Map 02.00 *Miami-Dade County Commission District 11*



Map 01.00 *Transportation, Circulation Routes: Streets in District 11, Miami-Dade County, FL*





Map 02.00 *Wellfield Protection Areas, May 2013. Miami-Dade County Commission District 11*