



 **SFRPC**
South Florida Regional Planning Council
Proudly serving South Florida since 1974

2022 - 2027 South Florida Comprehensive Economic Development Strategy

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SOUTH FLORIDA REGIONAL PLANNING COUNCIL



***COMPREHENSIVE ECONOMIC
DEVELOPMENT STRATEGY FOR SOUTH FLORIDA
2022 – 2027***

October 1, 2022

Adopted by the CEDS Committee on October 13, 2022

Adopted by the SFRPC on October 17, 2022



*This document was prepared under financial assistance
award EDA ED21ATL3020015 from the
Economic Development Administration of the U.S. Department of Commerce.*

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CHAIR'S LETTER



Dear Regional Stakeholders,

Welcome to 2022-2027 Comprehensive Economic Development Strategy Report for South Florida (The “CEDS”). The South Florida CEDS is prepared every 5 years, with yearly updates, through leadership of the South Florida Regional Planning Council (SFRPC) and with direction and input from the CEDS Strategy Committee and SFRPC Board for submittal to the U.S. Department of Commerce’s Economic Development Administration.

The CEDS highlights key economic challenges and opportunities facing Miami-Dade, Broward, and Monroe counties and its population of 4.7 million residents. The CEDS also contains an articulation of the key issues and strategic direction the region’s leaders should pursue to advance economic development, equitable access to opportunity, and prosperity in South Florida in the future.

The work put forth by Executive Director Isabel Cosio Carballo and SFRPC staff was truly amazing. The CEDS update process began more than a year and a half ago. We began with the development of the CEDS Strategy Committee and four subject area Workgroups. A SWOT (Strength, Weaknesses, Opportunities, Threats) Analysis was undertaken by the CEDS Committee and followed up with their preparation of four Priority Goals with many subgoals under each priority, Evaluation Framework, Key Projects, etc. This alone took many meetings.

I have served as an elected official since the late 1980’s and have participated as a member of many high-level Blue-Ribbon Committees and Commissions. *I have never served on a Committee with a membership of such high quality.* The CEDS Committee Membership includes multiple University and College Presidents, top CEOs / Business Leaders, the Presidents, CEOs, and Directors of the region’s Economic Development Organizations and County Economic Development Offices, Job/Workforce Training Organizations, the top Leadership of Water Management & Regional Transit Agencies, Elected and Appointed Government leaders, etc. The CEDS Committee met both in person and electronically with more than 15 meetings. I would like to extend my personal thanks to these Leaders, who all have great demands on their time, for giving so much of their time and expertise to the CEDS Committee.

There is a tremendous amount of data included in the CEDS. There will be some deviations in the data. Because some of the data used herein covers the Metropolitan Statistical Area consisting of Miami-Dade, Broward, and Palm Beach counties, the three largest population counties in Florida, some of the numbers used in this report will include Palm Beach County (of the Treasure Coast Regional Planning Council region), while some will not. Additionally, some of the data will be from 2022, while the most recent reports on some of the data may be from 2021 or even earlier based on best available data. We have tried to show when and where each data point came from, but in some cases there will not be exact matches.

This CEDS addresses myriad complex issues. One of the biggest problems in the SFRPC jurisdictional area is the lack of sufficient Affordable Housing. The CEDS explains why this is and offers proposals to deal with this. We talk about the need for Transit-Oriented Development (TOD) and other Transit needs. We discuss our current jobs strengths and weaknesses, and how to improve job opportunities through improved K-12 educational achievement and training. We discuss Education and Quality of Life issues. We discuss the region's infrastructure, environment, and the sustainability problems unique to this very low-lying region with impending Sea Level Rise. We discuss Regionalization, Resiliency Preparedness, and how to reduce current income inequality. In short, the CEDS Blueprint analyzes the current economy, paves the path for the region's future improved economy, and suggests how to achieve it. Included as Appendices to the CEDS are specific projects that we hope to see funded which we hope will better the quality of life in this area. The CEDS can be referred to for information on specific points or can be read as a document in its entirety. If you read the entire CEDS, you will have a much better understanding of this area than you do now.

In closing, on behalf the Council and its staff, I would like to thank the individuals, institutions, and organizations that comprise the CEDS Strategy Committee and CEDS Workgroups, the University of Florida's Shimberg Center for Housing Studies, the Florida Chamber Foundation, and consultant Kara Mattini for their many contributions and guidance.

We also thank the East Central Florida Regional Planning Council and Emerald Coast Regional Council for data, GIS mapping, and other support, and the U.S. Department of Commerce and Economic Development Administration for their financial support which, in part, made preparation of this CEDS for South Florida possible. We look forward to our continued work with the CEDS Strategy Committee, CEDS Work Groups, and other regional stakeholders as we build a better future for South Florida residents.

Sincerely,

A handwritten signature in cursive script that reads "Steve Geller".

Steve Geller

Broward County Commissioner, District 5

Former Florida Senator, District 31

Chair, SFRPC & CEDS Committee

INTRODUCTION

Economic Development District

The South Florida Regional Planning Council (SFRPC) is one of Florida's ten regional planning councils whose missions include coordinating intergovernmental and multi-sector regional collaboration to effectively address challenges and opportunities of regional importance. The Florida Legislature has recognized that regional planning councils are the only multipurpose regional entity in position to plan for intergovernmental solutions to growth related problems and meet other needs of communities in each region.

The SFRPC serves Monroe, Miami-Dade, and Broward counties; 70 municipalities; and 4.8 million residents. By 2045, the region is expected to grow to an estimated population of more than 5.7 million¹ residents. The SFRPC supports regional and community economic development efforts through its economic planning activities, technical assistance and project development support in coordination with the region's local governments and economic development organizations, regional convenings and planning, and the operation of multiple revolving loan funds supporting entrepreneurs, creating affordable housing, and furthering the remediation and redevelopment of brownfields.

Since 1994 the SFRPC has served as the Economic Development District (EDD) for South Florida and as the Economic Development Administration's (EDA) regional point of contact. In this role, the SFRPC works closely with regional stakeholders and the EDA to identify, secure, and deploy funding and technical assistance programs in South Florida. As the EDD, the SFRPC is responsible for developing, maintaining, and updating South Florida's Comprehensive Economic

Development Strategy (CEDS) every five years working in partnership with the region's leaders and community stakeholders.

The EDA directs each designated Economic Development District to develop and maintain a Comprehensive Economic Development Strategy (CEDS) with the assistance of public involvement. A CEDS is the result of a regionally managed planning process designed to build capacity and guide the economic prosperity and resiliency of an area or region.

Comprehensive Economic Development Strategy (CEDS)

In preparation for the 2022-2027 CEDS, SFRPC staff reviewed past CEDS, the Seven50 Regional Prosperity Plan, Census Data, JobsEQ for Workforce (a software tool that provides timely data on local workforce and employers, including demographics, occupations, wages, certifications, and more), United Way ALICE Reports, Economic Mobility Project Studies (an initiative of The Pew Charitable Trusts), and strategic economic development plans prepared by the Beacon Council, Greater Fort Lauderdale Alliance, the Florida Chamber Foundation. SFRPC staff also reviewed documents and statistical modeling prepared by the Southeast Florida Regional Climate Change Compact and other public sources of information. In reviewing these and other materials, particularly past CEDS developed in 2007, 2012, and 2017, it is noteworthy that many of the challenges identified in the past continue to be challenges today, in some instances with greater complexity.

How to use this Report

The CEDS Strategy Committee consists of the region's top public, private, and nonprofit CEOs representing educational institutions, economic development organizations, chambers of commerce, employers, transit agencies, workforce training, local governments,

resilience officers, and senior level staff among others. This report reflects the Committee’s work and conclusions on regional goals and key strategies to leverage regional assets and opportunities, diminish barriers, and create a vibrant and competitive economic environment that is diversified and resilient. The CEDS serves as a guiding document for economic development activities that regional leaders have agreed are important to advance.

For applicants seeking funding from the federal government, particularly the U.S. Economic Development Administration (EDA), a finding by the SFRPC of a grant proposal’s consistency with the CEDS is a key step toward securing funding from the EDA. The Council believes that "consistency" is also a critical step toward securing funding from other federal agencies. Grant proposals that advance the priority goals, activities, and investments contained in the CEDS are deemed to be “consistent” with the CEDS.

Alignment with the regional CEDS effectively bolsters local efforts as communities and businesses build strategic partnerships and search for federal and state funding for investments and local economic development and recovery efforts. The CEDS is a “living document” which will be updated periodically to reflect changes in data, regional conditions, and trends.

Defining the Region

In 2021 the South Florida Region had a resident population of 4.7 million, which is a population larger than that of 27 states. South Florida’s role as a national and international banking, commerce, and tourism gateway is supported by three major international airports, executive airports, three major seaports, industrial parks, foreign trade zones and other critical infrastructure. Apart from the SFRPC’s three-county region, Miami-Dade, Broward, and Palm Beach counties form a

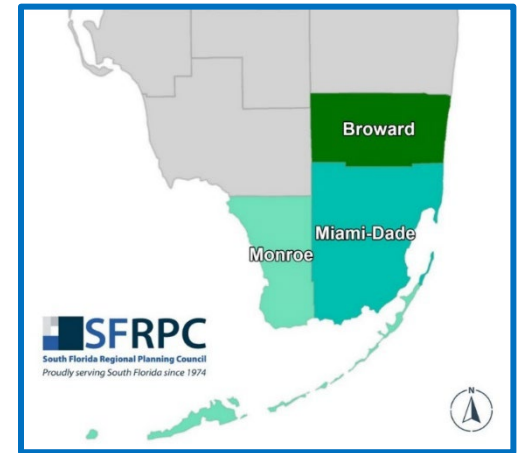
separate census area known as the Metropolitan Statistical Area of Miami-Fort Lauderdale-Pompano Beach.

For most of South Florida’s history, tourism has been the key driver of the economy leaving the Region’s economy vulnerable to economic downturns when tourism decreases. With varying landscapes and culture, each county offers tourists and snowbirds different natural and man-made amenities and experiences. Broward County and the majority of Miami-

Dade County are uniformly developed, large, dense, urbanized area. Its cosmopolitan international vibe, beaches, cultural arts, and special events such as Art Basel, Formula 1 Miami Grand Prix, and the Tortuga Music Festival make South Florida an attractive location for domestic and multinational firms, and native-born and international residents. South Miami-Dade, home to NASCAR, rodeos, and Everglades National Park and Biscayne National Park, is historically known for its rich farmlands, tropical agriculture, and exotic fruit stands although, increasingly, South Dade’s farmland is being converted to housing and non-agricultural uses.

Monroe County - home to the world-famous Florida Keys - enjoys a slower pace of life with villages and smaller cities. The Keys are known for sportfishing, boating, scuba diving and seafood as well as a laid-back island lifestyle. The City of Key West with more than 26,000 residents is the most populated city in Monroe County and the county seat. Seventy miles west of Key West is the Dry Tortugas National Park, a unique treasure of the National Park System featuring Fort

South Florida Region



Jefferson which was constructed in 1846 to defend the United States. The three counties support important military installations and personnel that perform critical national security functions: Naval Air Station Key West; Homestead Air Reserve Base, U.S. SouthCOM; and the South Florida Ocean Measurement Facility (U.S. Navy).

The regional overview which follows provides an illustrative snapshot of each county individually as well as the region in its entirety. The CEDS is intended to inform discussion regarding the region’s goals to encourage robust growth and diversification of the economy. Please note that economic conditions are presently fluctuating at a rapid pace with inflation, supply chain difficulties, rising prices for food, housing, insurance, etc. so this data may under or over represent certain economic indicators.

Geography & Geology

***Broward, Miami-Dade, Monroe Counties
Historical Unemployment Rates 2017-2022
(NOT SEASONALLY ADJUSTED)***

<i>County</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>2020</i>	<i>2021</i>	<i>August 2022</i>
<i>Broward</i>	4%	3.5%	3.1%	9.6%	4.9%	2.8%
<i>Miami-Dade</i>	4.8%	3.9%	2.7%	7.4%	5.2%	2.3%
<i>Monroe</i>	3.3%	2.6%	2.1%	8.4%	3.0%	1.7%

Source: Local Area Unemployment Statistics – FloridaJobs.org

The South Florida Region is a coastal region of approximately 7,500 square miles, of which approximately 45% (3,338 square miles) is water.² The Atlantic Ocean is the eastern boundary of the region. The Everglades and wetlands are the western boundary of Miami-Dade and Broward counties. Monroe County’s western boundary is the Gulf of Mexico. This geographic constraint limits development and greatly contributes to rising housing costs and the lack of sufficient affordable

housing. Built upon a limestone geology, resilience concerns include sea-level rise, flooding, storm surge and other related effects that impact both inland and coastal communities.

South Florida is characterized by a relatively flat topography with elevations trending downwards from the east and along the Atlantic Coastal Ridge to the west. Elevation is generally under 10 feet above sea level, excluding the Coastal ridge where it reaches 20 feet above sea level in certain areas. Most of South Florida’s landscape is composed of karst landforms, created through the dissolution of the limestone bedrock by groundwater. This creates honeycombed underground formations, subterranean tunnels, and cavities filled with freshwater, collectively termed the Floridian Aquifer which is overlaid by the Biscayne Aquifer. The water table is close to the surface which makes South Florida’s water supply susceptible to pollution from the urban and agricultural environment. In addition, the high-water table makes South Florida more susceptible to flooding due to sea level rise. The combination of low topography, karst substrate, and coastal proximity creates unique environmental and climate resilience vulnerabilities for South Florida, exacerbated by the possibility, and sometimes actual landfall, of hurricanes between June and November every year.

Employment & Job Creation

Unemployment throughout the region had been trending downwards 2017 to 2019. In 2020, unemployment more than tripled and peaked due to the COVID pandemic. As of August 2022, unemployment rates were lower than in 2017 with 2.3% in Miami-Dade County, 2.8% in Broward County, and 1.7% in Monroe County. This compares to an August 2022 unemployment rate of 2.7% in Florida and 3.8% nationally.

The trend of SFRPC counties having lower than national unemployment rates continued until the onset of the COVID-19

pandemic. Monroe County especially felt the acute pain of the shut-down with unemployment soaring as tourism collapsed. However, since 2021 the unemployment rates in all counties have remained below the national average. Most indicators point to a strong economy.

Please note that because the South Florida region is part of the Metropolitan Statistical Area of Miami-Fort Lauderdale-Pompano Beach, much of the available data is for the Metropolitan Area is referred to as the “Miami Metro Area” which is comprised of Miami-Dade, Broward, and Palm Beach counties.

- The Miami Metro Area had the fastest over-the year job growth rate among Florida’s metro areas in August 2022 (+7.9%)
- The Miami Metro Area gained the highest number of private sector jobs among Florida’s metro areas in August 2022, adding 82,500 jobs
- The Miami Metro Area’s nonagricultural employment increased by 80,400 jobs (+6.8% over the year)
- The Miami Metro Area’s unemployment rate dropped 2.8 percentage points over the year to 2.3%
- Industries gaining the most jobs in the Miami Metro Area over the year were as follows:
 - Trade, transportation, and utilities with 26,300 jobs
 - Leisure and hospitality with 15,700 new jobs
 - Education and health services with 12,000 jobs
 - Professional and business services with 11,900 new jobs³
- According to the U.S. Bureau of Labor Statistics from August 2021 – July 2022, the Civilian Labor Forces for each county grew:
 - by 10,089 persons in Miami-Dade
 - by 34,769 persons in Broward County
 - by 4,512 persons in Monroe County



<https://biznews.fiu.edu/2018/05/study-reveals-small-businesses-strength-in-miami-dade-countys-economy/>

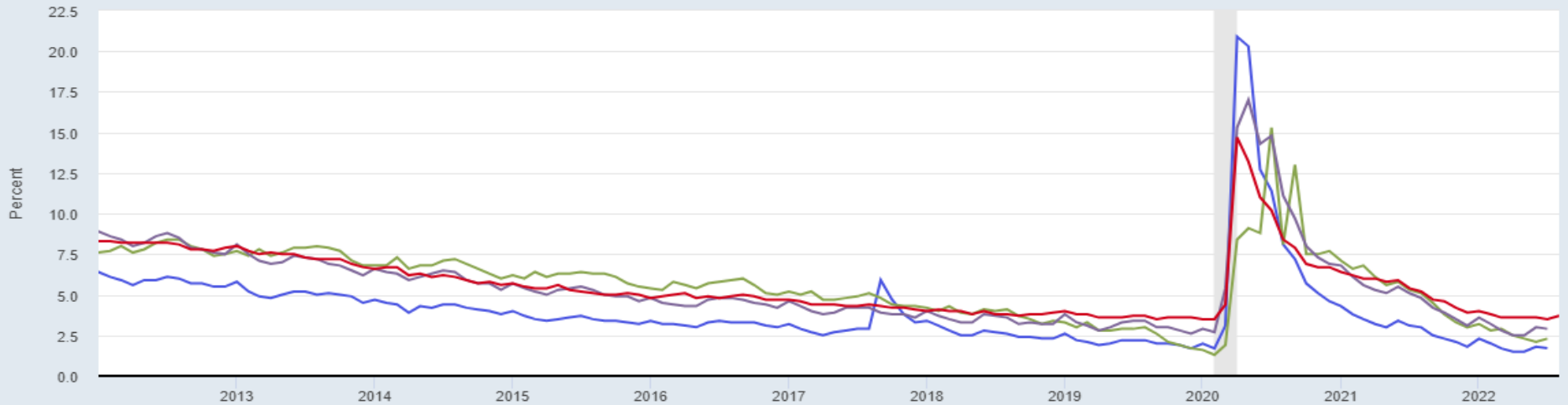


<https://www.caribbeannationalweekly.com/community-news/broward-county-provides-small-business-assistance/>



- Unemployment Rate in Monroe County, FL
- Unemployment Rate in Miami-Dade County, FL
- Unemployment Rate in Broward County, FL
- Unemployment Rate

SFRPC Area & National Unemployment



Shaded areas indicate U.S. recessions.

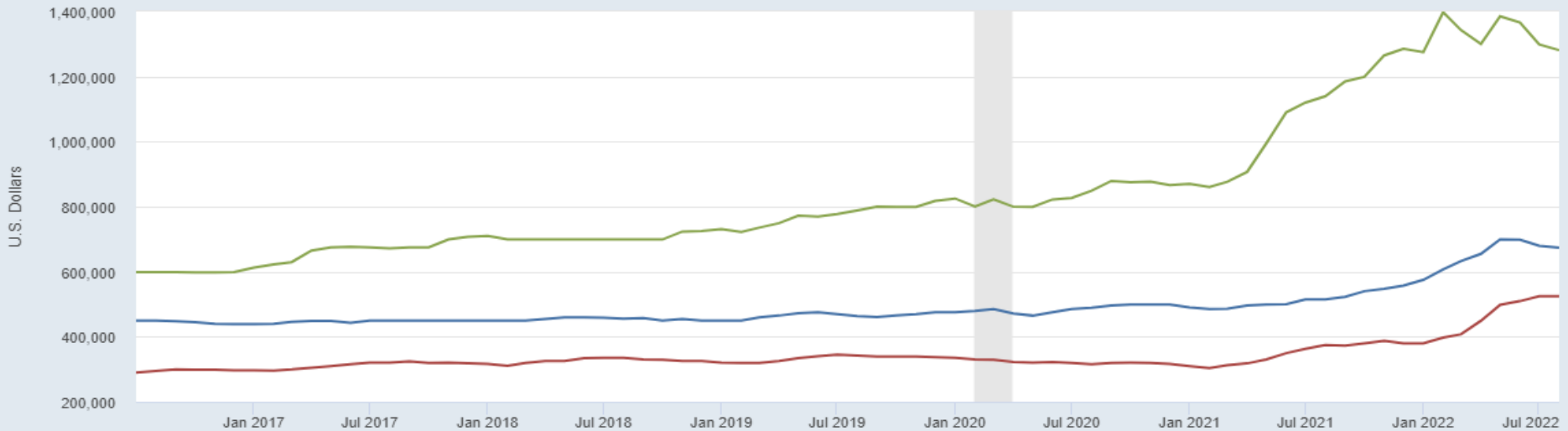
Source: U.S. Bureau of Labor Statistics

fred.stlouisfed.org



- Housing Inventory: Median Listing Price in Miami-Dade County, FL
- Housing Inventory: Median Listing Price in Broward County, FL
- Housing Inventory: Median Listing Price in Monroe County, FL

SFRPC Area Median Listing Prices



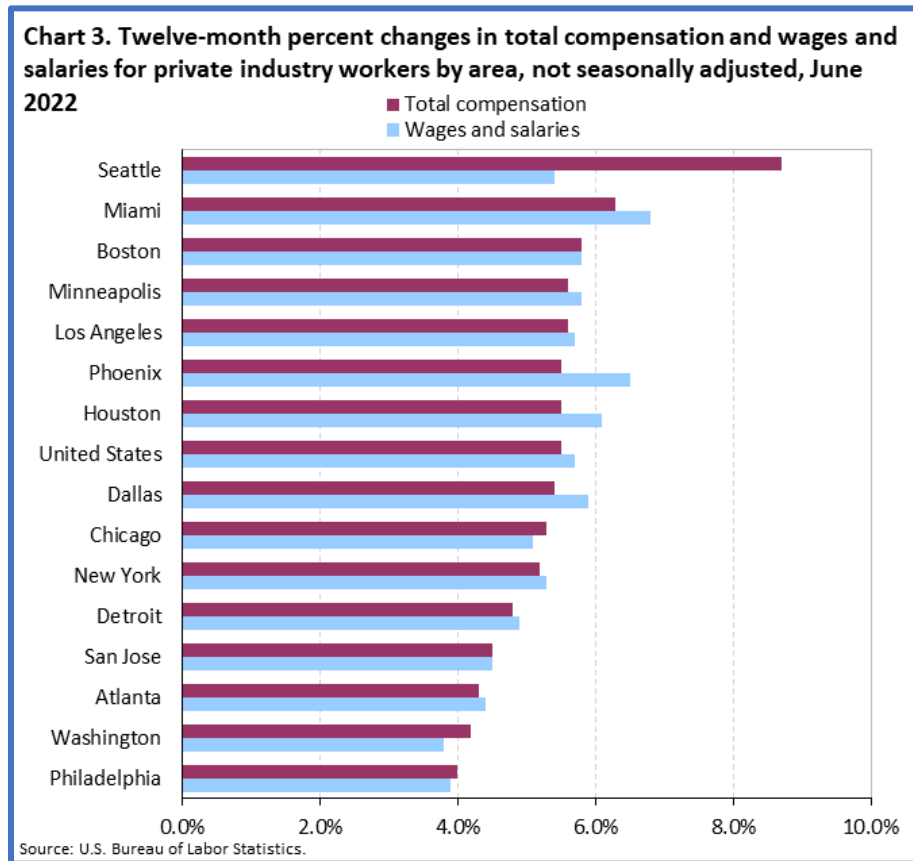
Shaded areas indicate U.S. recessions.

Source: Realtor.com

fred.stlouisfed.org

The extremely low August 2022 unemployment rate of 2.3% in Miami-Dade County, 2.8% in Broward County, and 1.7% in Monroe County, combined with the high cost of housing, transportation, and inflation, makes it challenging for employers to find employees to fill vacant positions.

The most significant economic challenge facing the South Florida economy is affordability. The Consumer Price Index (CPI) as of August 2022 was up 8.3 percent⁴ for the U.S. with a 10.7 percent increase in the Miami - Fort Lauderdale - Pompano Beach MSA over the past year.⁵ Items such as food have increased 11.4 percent over the last year (July 2021 - August 2022) and energy has risen 23.8% during this same period nationally.⁶



Housing is one of the largest household budget costs followed by transportation. On June 29, 2022, Miami-Dade County was deemed the epicenter of the country’s housing crisis” by the U.S. Secretary of Housing and Urban Development.

The housing crisis extends to neighboring Monroe and Broward counties as well. The Median Sale Listing Price in Monroe County is presently over \$1.28 million; \$674,000 in Miami-Dade County; and nearly \$525,000 in Broward County⁷ making housing unaffordable to many South Florida residents.



Liberty City Square Redevelopment Project, Miami-Dade County

Rental prices have skyrocketed. Rentcafe, a nationwide internet listing service providing apartments and houses for rent throughout the United States, named Miami as one of the most competitive rental markets in the country. Rentcafe recorded the average rent in Miami at \$2,307 with an average apartment size of 887 Square Feet as of July 2022.

Using the previous example, a yearly rental of \$27,684 represents 47% of Miami-Dade’s Median Household Income (MHI), which was \$59,259 in 2020. In Fort Lauderdale, the average rent is \$2,719 with an average apartment size of 959 Square Feet as of July 2022. Broward County’s 2020 Median Household Income was \$68,584. Therefore, the average rent equivalates to a housing cost of 51% of the Median Household Income; 21% over the U.S. Department Housing and Urban Development affordability standard of 30% of household income.

In Monroe County, Rentcafe data is not available, but Rent.com, a similar listing service, reports an average one-bedroom rental in Key West at \$2,500 per month. This is nearly 44% of Monroe County’s Median Household Income.

The housing crisis stems from a confluence of factors including limited availability of land, high demand from Latin American investment buyers, large numbers of employees in low-wage industry sectors such as Hospitality & Leisure, and people relocating from higher priced states for remote work opportunities. Limited land for development, rising construction costs, and skyrocketing insurance prices pose additional challenges for the construction of middle-class housing.

Wages and compensation are increasing in the Miami Metro Area, but not at the same pace as inflation. In June 2022 the U.S. Bureau of Labor Statistics placed the Miami Metro Area second in the U.S. for its annual increase for total compensation as well as wages and salaries. However, the annual increase in compensation is not sufficient to overcome the rate of inflation. For the regional economy to sustain its growth, it must devise strategies and solutions to address its high housing and other costs of living.

Labor Force as a % of Population

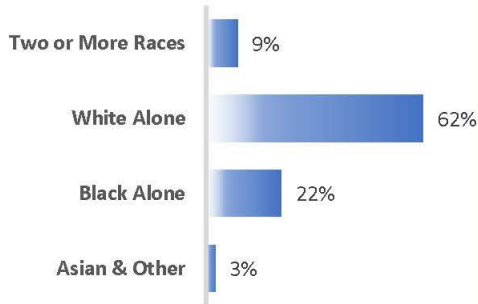
	Population April 1, 2020	Labor Force August 2022 (seasonally adjusted)	Labor Force as a % of Population	Employment August 2022	Unemployment August 2022	Unemployment Rate August 2022	Unemployment Rate August 2021
United States	331,449,281	164,746,000	50%	158,732,000	6,014,000	3.7%	5.2%
Florida	21,538,187	10,706,000	50%	10,413,000	293,000	2.7%	4.3%
Broward	1,944,375	1,077,924	55%	1,047,528	30,396	2.8%	4.8%
Miami-Dade	2,701,767	1,335,706	49%	1,305,136	30,570	2.3%	5.1%
Monroe	82,874	50,973	62%	50,120	853	1.7%	3.0%

Source: DEO, Retrieved 9/22/2022, <https://floridajobs.org/workforce-statistics/workforce-statistics-data-releases/latest-statistics>

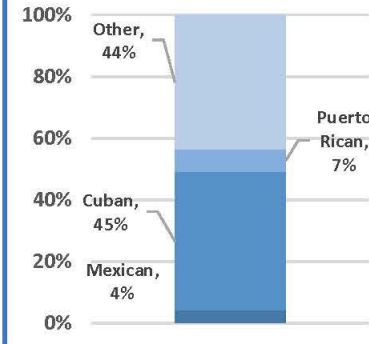
REGIONAL FACT SHEET

Southeast Florida (Broward, Miami-Dade, and Monroe Counties)

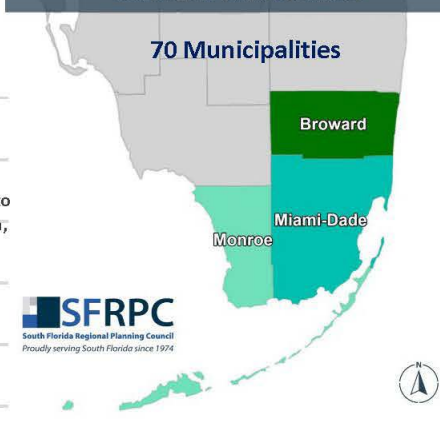
Population By Race 2020
4,722,938



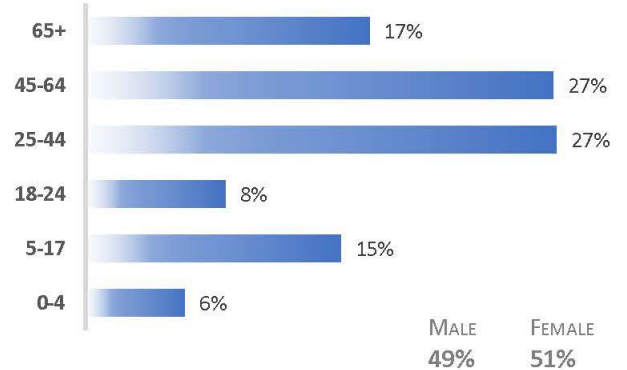
Hispanic Population
2,448,390 (51.8%)



Southeast Florida Counties



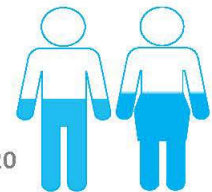
Population By Age 2020
Median Age 40.4



*Hispanic is not considered a race, as Hispanics can be from various racial backgrounds.



55.0%
US BORN 2020
45.0%
FOREIGN BORN 2020



Median Household Income

\$59,989



Florida \$67,521
U.S. \$57,703

Per Capita Income

\$31,557



Florida \$35,808
U.S. \$32,848

Labor Force

2.47 Million

Employed Civilian
Population 16 years and over
(2016 - 2020)

Business Establishments

159,027

Payroll* \$89,952,608
Employees 1,778,442
*(in thousands)

Households

1.63 Million

Family Households 1,086,441
Married w/Children 272,061
Single Parents 163,086
Living Alone 451,153

Total Population

4.7 Million (2020 Est.)



5.0M 2030 Est
7.62% Growth

Housing Units

1.91 Million / \$304,417

Owner Occupied 49%
Renter Occupied 37%
Seasonal/Rec Use 14%

Poverty Rate

14.55%

ALICE Households 37%
Poverty Households 15%
2018 Data

**Educational Attainment
25 Years & Older**

3.36 Million

Less than 9th 242,819
HS Diploma 904,156
Bachelor's 669,384
Graduate 398,418

**Means of Travel to
Work**

2.29 Million

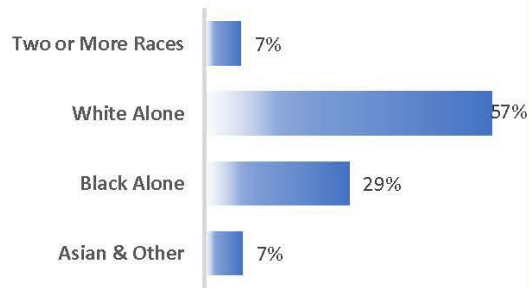
Worked at Home 154,791
Public Transportation 77,895
Walked 38,161
Drove Alone 1.76 mill
Carpooled 204,377

Sources: U.S. Census Bureau, and Stats America

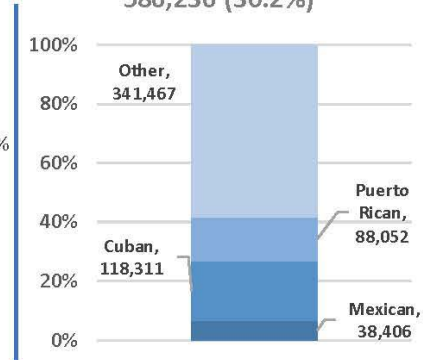
REGIONAL FACT SHEET

Broward County

Population By Race 2020
1,942,273



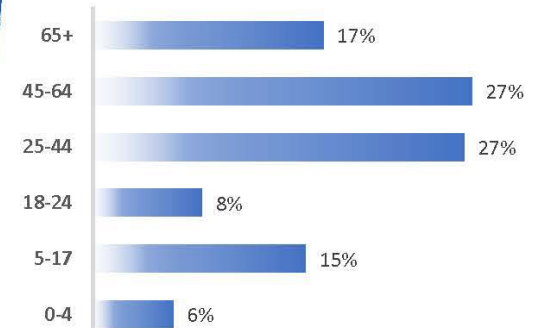
Hispanic Population
586,236 (30.2%)*



Broward County
31 Municipalities



Population By Age 2020
Median Age 40.2

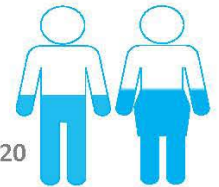


MALE 49%
FEMALE 51%

*Hispanic is not considered a race, as Hispanics can be from various racial backgrounds.



65.7%
US BORN 2020
34.3%
FOREIGN BORN 2020



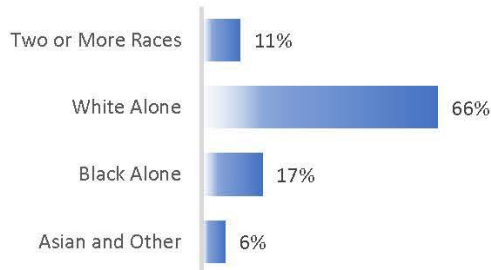
<p>Median Household Income</p> <p>\$60,922</p> <p>Florida \$57,703 U.S. \$64,994</p>	<p>Per Capita Income</p> <p>\$34,063</p> <p>Florida \$32,848 U.S. \$35,808</p>	<p>Labor Force</p> <p>1,036,095</p> <p>Employed Civilian Population 16 years and over (2016 - 2020)</p>	<p>Business Establishments</p> <p>64,660</p> <p>Payroll* \$37,387,991 Employees 736,661 (*in thousands)</p>	<p>Households</p> <p>704,942</p> <p>Family Households 447,453 Married w/Children 114,141 Single Parents 65,678 Living Alone 210,351</p>
<p>Total Population</p> <p>1.9 Million (2020 Est.)</p> <p>2.09M 2030 Est 7.18% Growth</p>	<p>Housing Units</p> <p>826,382 / \$282K</p> <p>Owner Occupied 54% Renter Occupied 32% Seasonal/Rec Use 15%</p>	<p>Poverty Rate</p> <p>12.7%</p> <p>ALICE Households 37% Poverty Households 13% 2018 Data</p>	<p>Educational Attainment 25 Years & Older</p> <p>1.37 Million</p> <p>Less than 9th 62,581 HS Diploma 372,575 Bachelor's 284,566 Graduate 172,135</p>	<p>Means of Travel to Work</p> <p>954,804</p> <p>Worked at Home 63,985 Public Transportation 22,765 Walked 11,015 Drove Alone 747,893 Carpooled 86,089</p>

Sources: U.S. Census Bureau, and Stats America

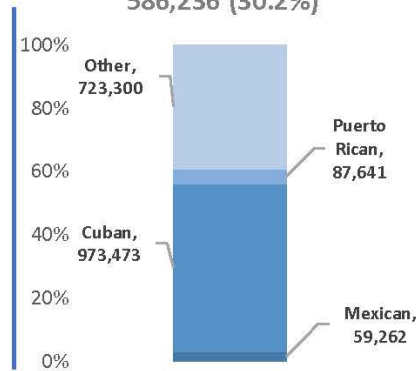
REGIONAL FACT SHEET

Miami-Dade County

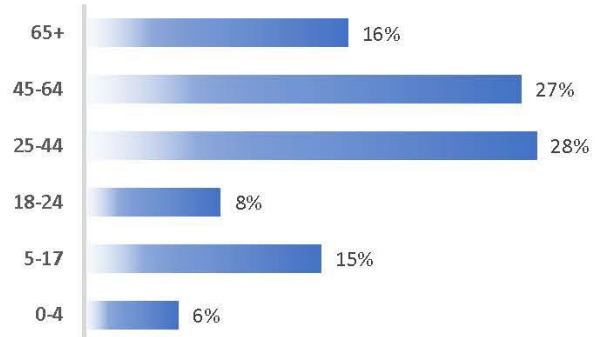
Population By Race 2020
2,705,528



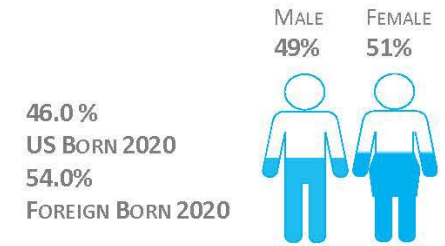
Hispanic Population
586,236 (30.2%)



Population By Age 2020
Median Age 40.5



*Hispanic is not considered a race, as Hispanics can be from various racial backgrounds.



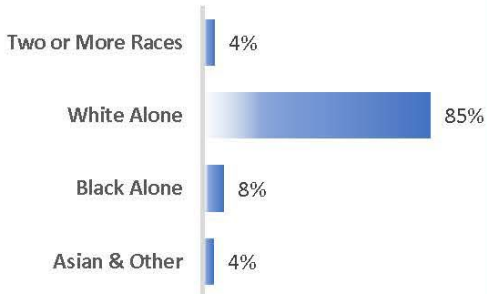
<p>Median Household Income</p> <p>\$59,259</p> <p>Florida \$57,703 U.S. \$64,994</p>	<p>Per Capita Income</p> <p>\$29,598</p> <p>Florida \$32,848 U.S. \$35,808</p>	<p>Labor Force</p> <p>1,396,973</p> <p>Employed Civilian Population 16 years and over (2016 - 2020)</p>	<p>Business Establishments</p> <p>90,482</p> <p>Payroll* \$51,381,658 Employees 1,009,024 (*in thousands)</p>	<p>Households</p> <p>902,200</p> <p>Family Households 619,475 Married w/Children 153,770 Single Parents 95,373 Living Alone 231,236</p>
<p>Total Population</p> <p>2.7 Million (2020 Est.)</p> <p>2.9M 2030 Est 7.70% Growth</p>	<p>Housing Units</p> <p>1,032,310 / \$310K</p> <p>Owner Occupied 45% Renter Occupied 42% Seasonal/Rec Use 13%</p>	<p>Poverty Rate</p> <p>16%</p> <p>ALICE Households 37% Poverty Households 17% 2018 Data</p>	<p>Educational Attainment 25 Years & Older</p> <p>1.92 Million</p> <p>Less than 9th 178,065 HS Diploma 515,319 Bachelor's 371,822 Graduate 218,483</p>	<p>Means of Travel to Work</p> <p>1,326,437</p> <p>Worked at Home 87,709 Public Transportation 54,818 Walked 25,033 Drove Alone 986,132 Carpooled 115,299</p>

Sources: U.S. Census Bureau, and Stats America

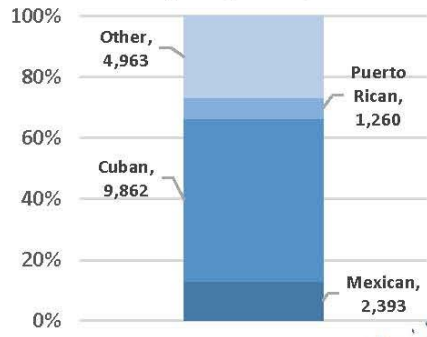
REGIONAL FACT SHEET

Monroe County

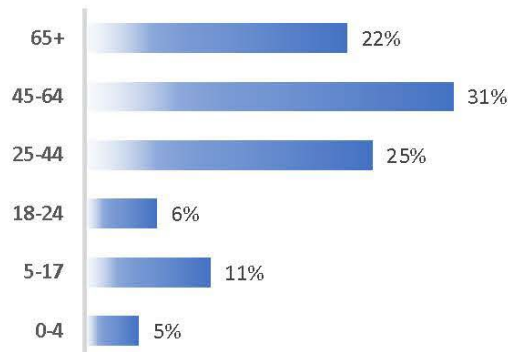
Population By Race 2020
75,137



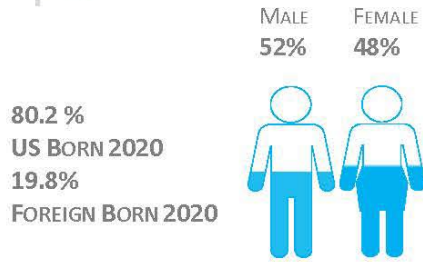
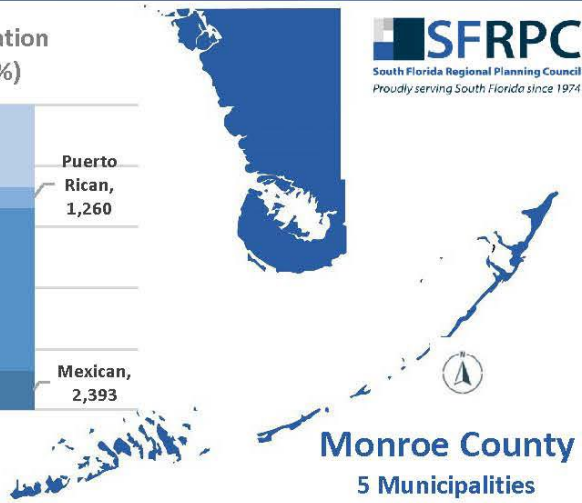
Hispanic Population
18,478 (24.6%)



Population By Age 2020
Median Age 47.9



*Hispanic is not considered a race, as Hispanics can be from various racial backgrounds.



Median Household Income

\$60,922

Florida \$57,703
U.S. \$64,994

Per Capita Income

\$47,382

Florida \$32,848
U.S. \$35,808

Labor Force

40,166

Employed Civilian Population 16 years and over (2016-2020)

Business Establishments

3,885

Payroll* \$1,182,959
Employees 32,757
*(in thousands)

Households

32,794

Family Households 19,513
Married w/Children 4,150
Single Parents 2,035
Living Alone 9,566

Total Population

82,170 (2020 Est.)

93K 2030 Est
12.2% Growth

Housing Units

53,759 / \$558K

Owner Occupied 36%
Renter Occupied 25%
Seasonal/Rec Use 39%

Poverty Rate

10.6%

ALICE Households 29%
Poverty Households 8%
2018 Data

Educational Attainment 25 Years & Older

58,963

Less than 9th HS Diploma 2,173
Bachelor's 12,996
Graduate 7,800

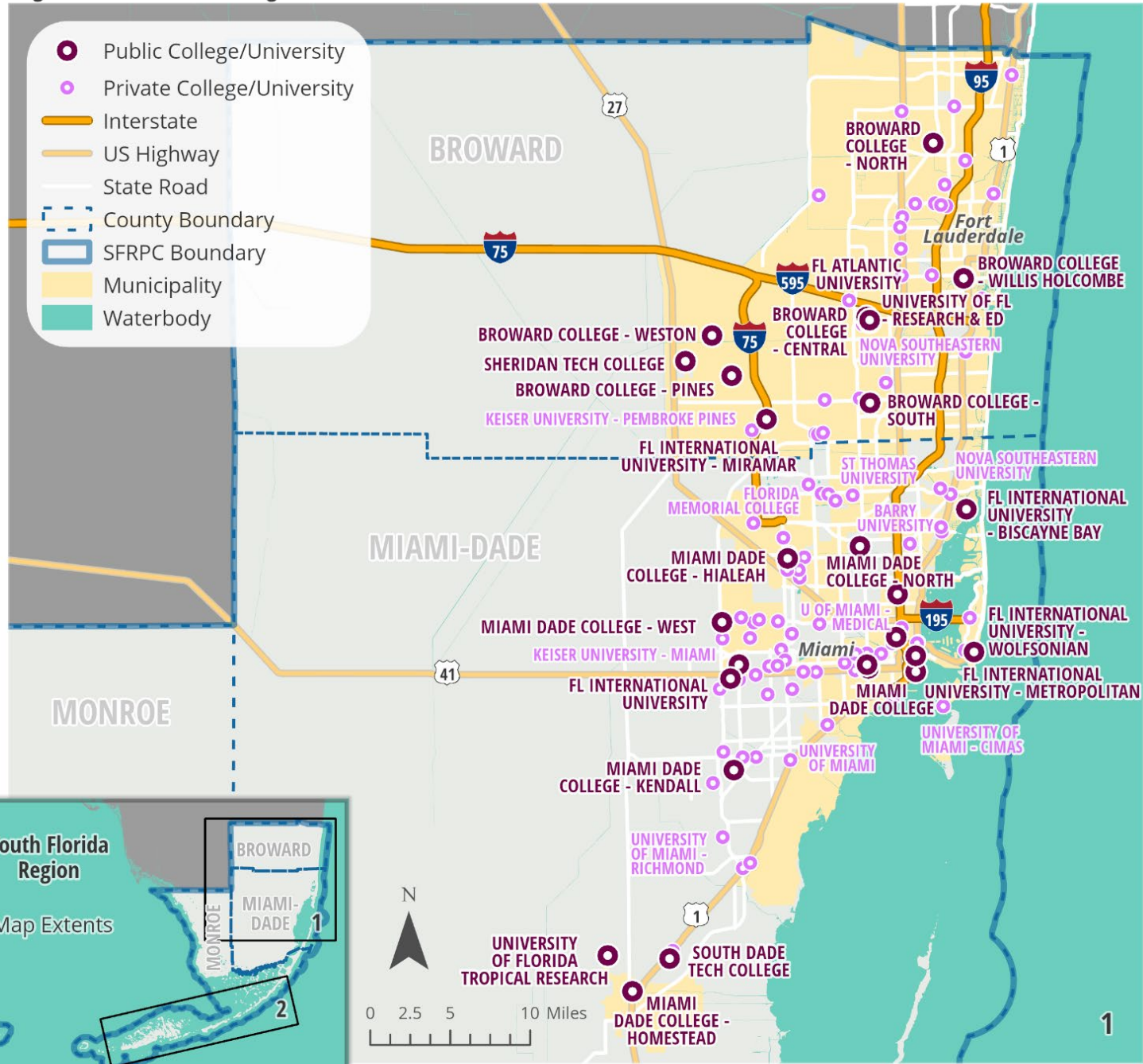
Means of Travel to Work

40,129

Worked at Home 3,097
Public Transportation 312
Walked 2,113
Drove Alone 27,285
Carpooled 2,989

Sources: U.S. Census Bureau, and Stats America

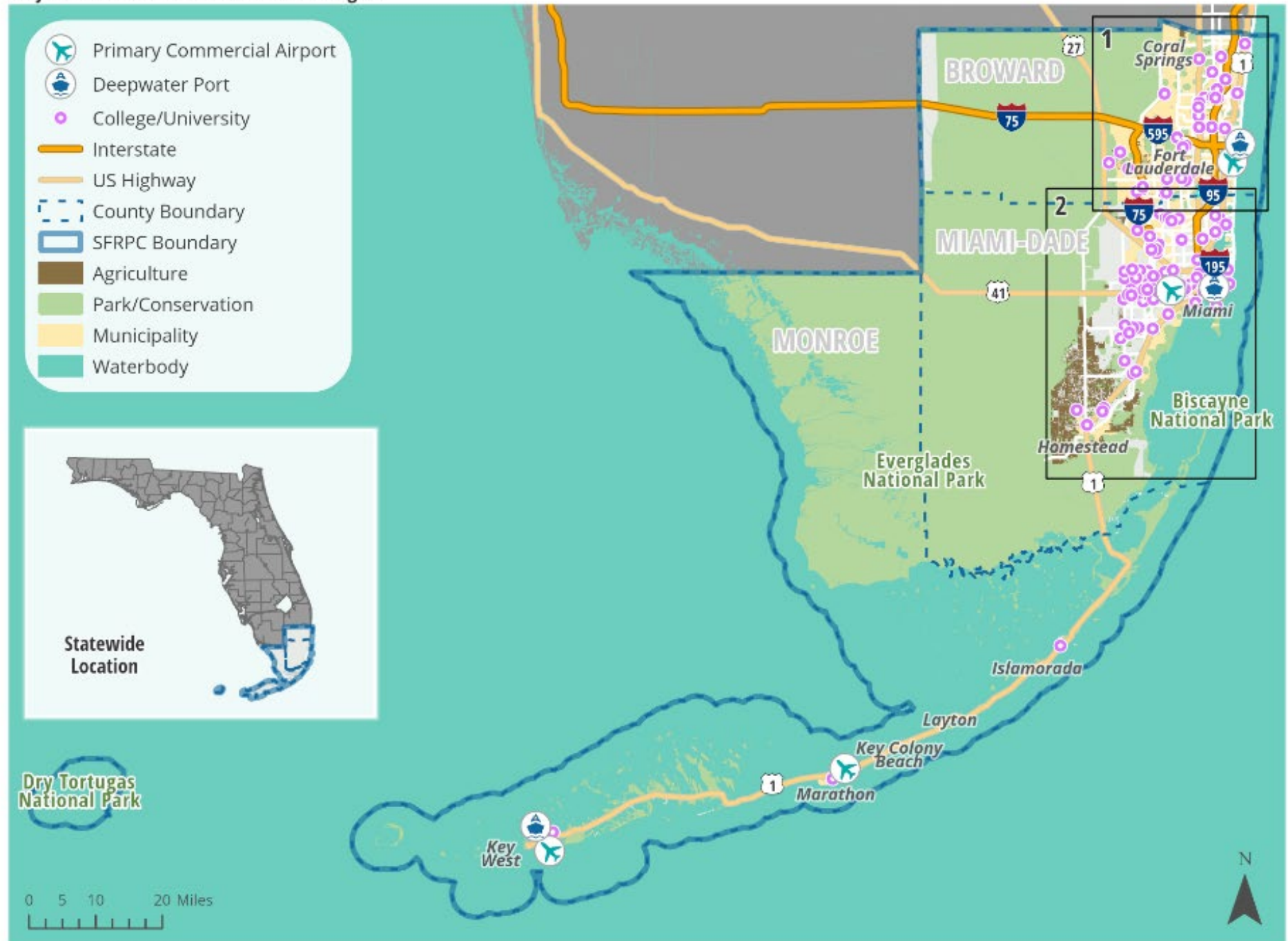
Regional Institutions of Higher Education



Source: FDOT, FGDL 2021




















Not all colleges/universities are labeled on map

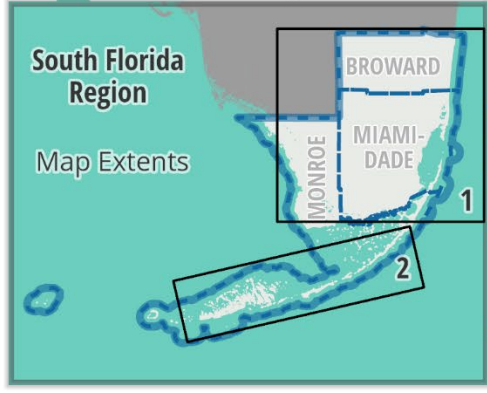
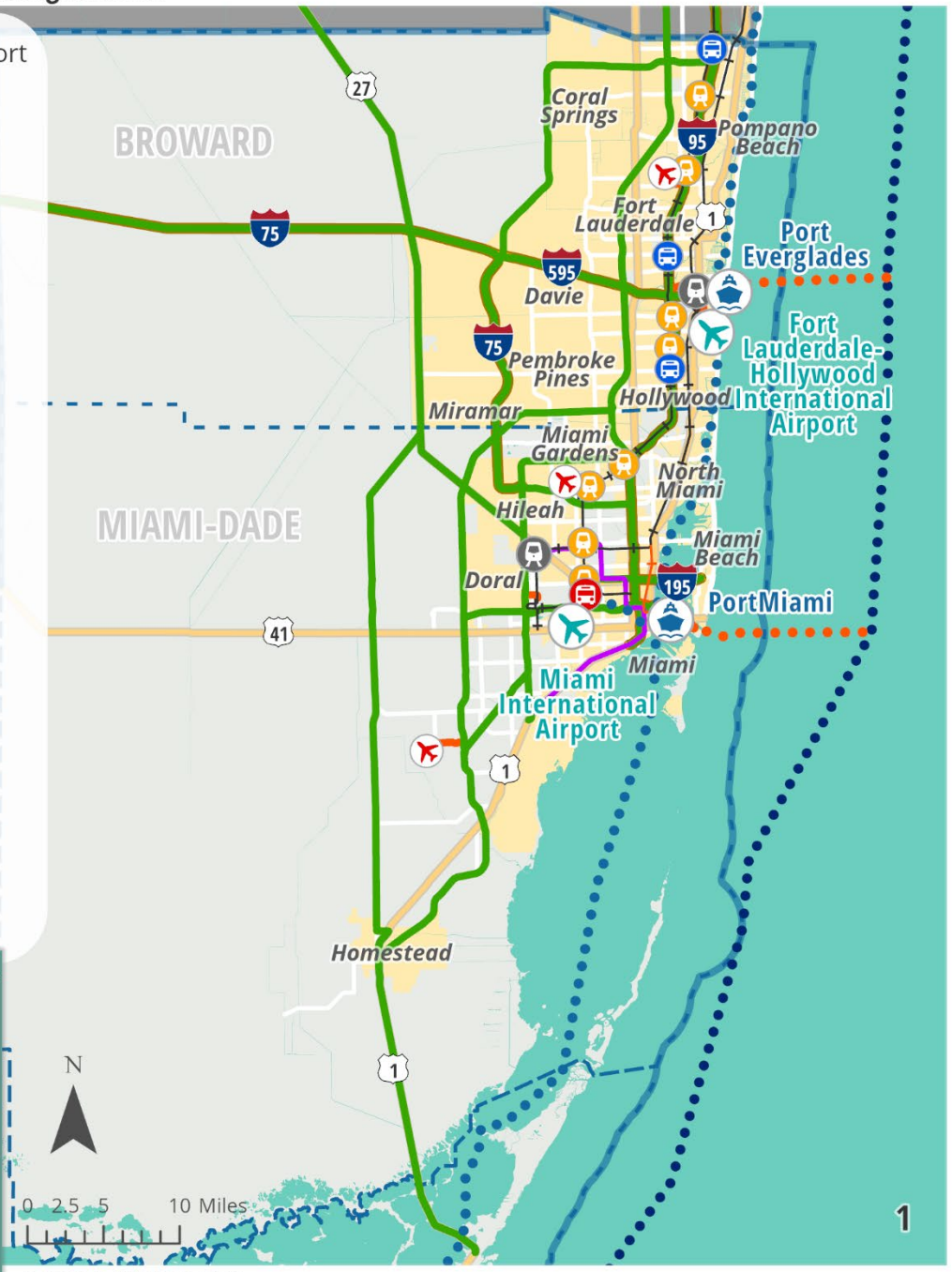
Major Features of the South Florida Region



Source: FDOT, FGDL 2021

Transportation Facilities of Regional Significance

-  Primary Commercial Airport
-  General Aviation Reliever
-  Deepwater Port
-  Miami Intermodal Center
-  Passenger Terminal
-  Rail Freight Terminal
-  Fixed Transit Terminal
-  Metrorail
- SIS Highways
 -  Corridor
 -  Connector
- SIS Railways
 -  Corridor
 -  Connector
- SIS Waterways
 -  Waterway
 -  Connector
 -  Shipping Lane
 -  County Boundary
 -  SFRPC Boundary
 -  Municipality
 -  Waterbody



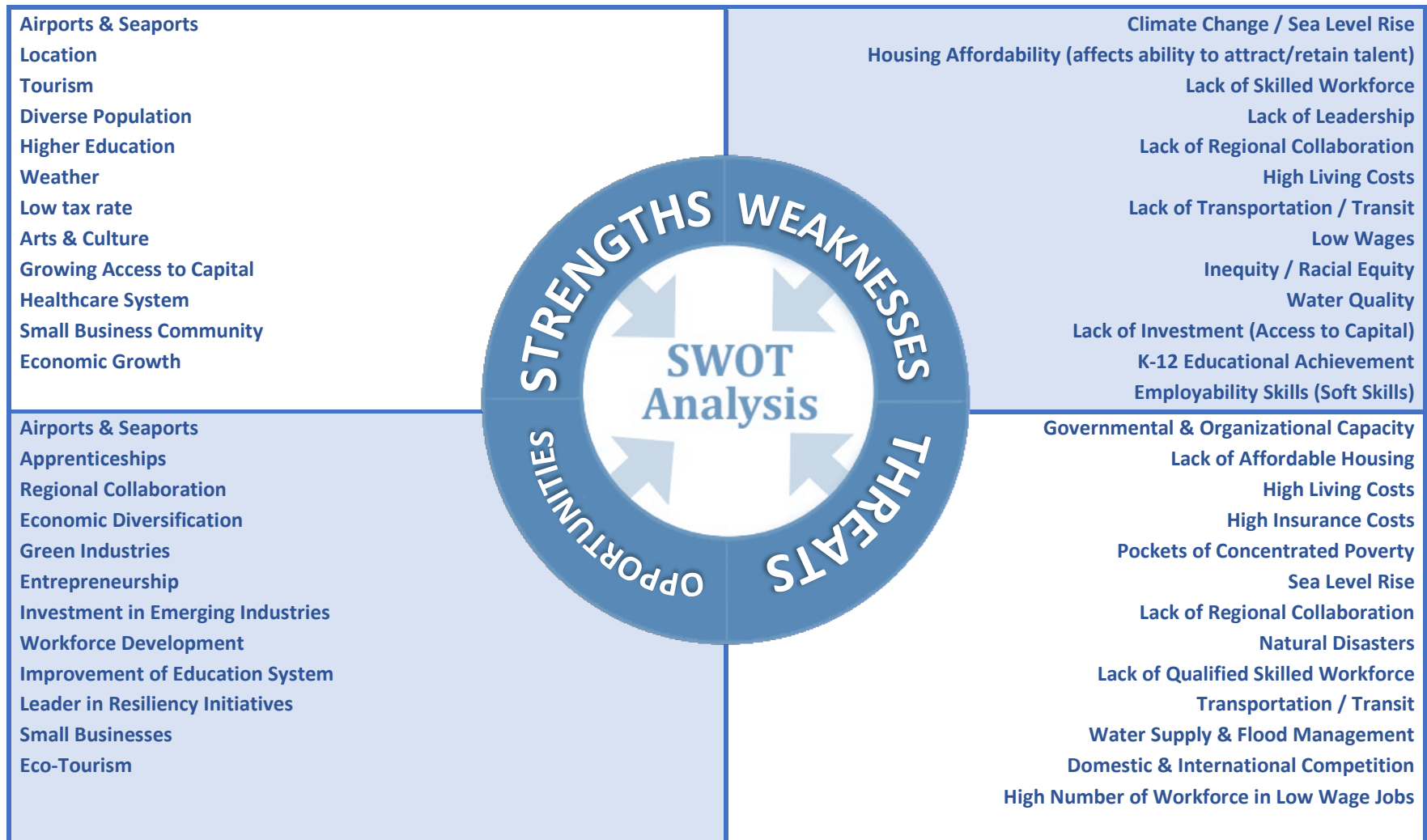
Source: FDOT, FGDL 2021



SWOT ANALYSIS - STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

The SWOT analysis of the regional economy answers the question of “Where are we now?” In September 2021 a survey was sent to stakeholders to request their feedback on the region’s Strengths, Weaknesses, Opportunities, and Threats (SWOT).

Using their responses, this chart identifies the region’s competitive advantages that can be leveraged to enhance economic growth including cultural, economic, technological, intellectual, and physical assets. The SWOT analysis exercise was instrumental in shaping the Plan’s Vision Statement, Goals, and Strategies. Leveraging regional strengths and opportunities to diminish weaknesses and threats is key to developing a resilient, vibrant economy.



STRATEGIC DIRECTION

South Florida continues to emerge as a globally connected metropolitan area, the EDD continues to develop robust goals with implementation action measures that address the CEDS goals for the next five years. The South Florida CEDS, augmented by the CEDS Strategy Committee, provides a strategy for resilient regional development. The Florida Chamber Foundation's Six-Pillars Framework⁸, which includes Talent Supply and Education, Innovation and Economic Development, Infrastructure and Growth, Business Climate and Competitiveness, Civic and Governance Systems, and Quality of Life and Quality of Place are incorporated into the CEDS by reference.

Talent Supply & Education Pillar – Florida is experiencing a talent gap – a crisis in human capital that represents a vast and growing unmet need for a highly skilled and educated workforce. As technology and new innovations continue to change, Florida will struggle to remain a global leader without a thriving base of knowledge workers. Education and training are the foundation of Florida's future workforce.

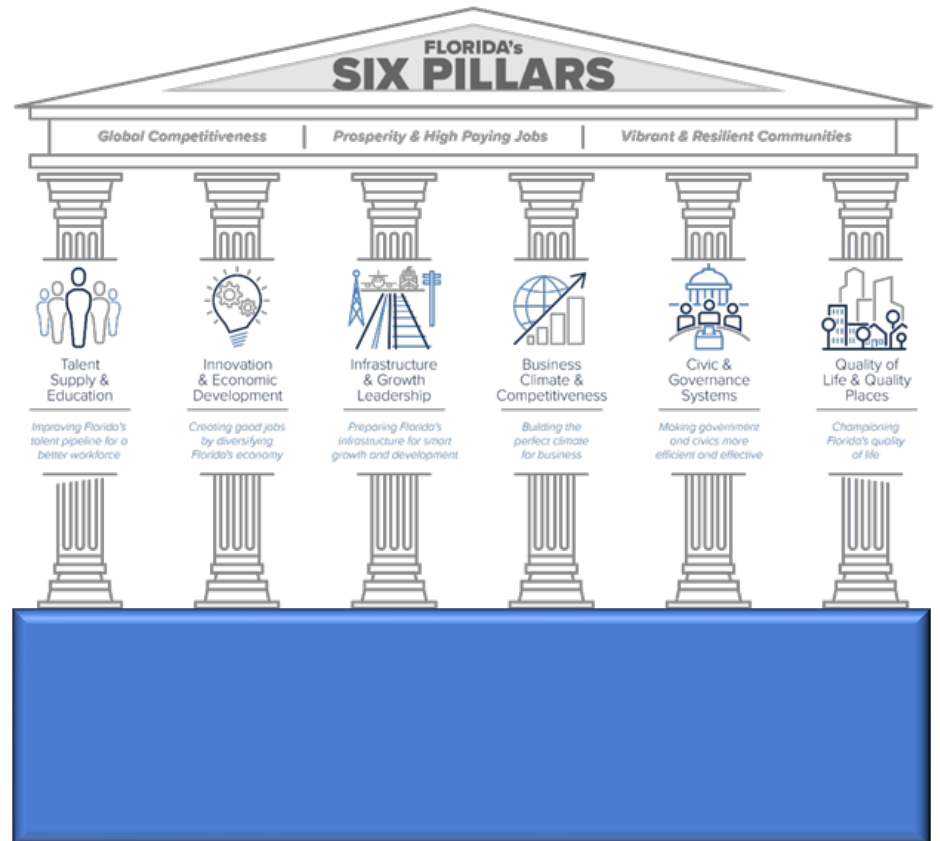
Innovation & Economic Development Pillar – Competitiveness and prosperity in the 21st century will be based on technology, knowledge, and innovation. Demands for return on investment have never been greater and legacy industries will continue to contend with pressure as new industries emerge. As we consider Florida's future, transforming our existing business base is the key to retention and expansion.

Infrastructure & Growth Pillar – Florida's seaports, airports, highways, railways and supporting infrastructure need to be able to grow smarter for the future residents. Planning for future development, water, transportation and logistics, energy,

communications, waste management, emergency preparedness, and environmental issues are essential to a prosperous, inclusive future.

Business Climate & Competitiveness Pillar – Providing the resources for businesses to start and grow including ensuring reasonable regulations, expedited permitting, low tax rates, and access to capital and business assistance are components of creating a friendly business climate that encourages and support entrepreneurs.

Civic and Governance Pillar – Creating orderly, ethical, and reliable civic and governance structures are key to a prosperous society and economic growth.



Quality of Life & Quality of Place Pillar – The region’s unique natural resources make it a great place to live, learn, work, and play but this is not enough for future economic prosperity. The region must continue to plan for a future that encourages and creates opportunities for prosperity, healthcare, housing and livability, economic opportunity and prosperity, families and children, safety and security, retirement and lifelong engagement, and sense of place and community. These opportunities are essential to creating and maintaining a quality and competitive metropolitan area. Maintaining affordable housing and smart land use planning in Florida’s communities is essential in fostering thriving families and neighborhoods. As a primary building block of prosperity, these factors impact the entire population from very low-income, low-income, and middle-class residents to upper-middle class and wealthy individuals and families, especially during times of unemployment to economic downturn.

Florida Chamber Foundation Miami Metro Skills Report

In June 2021, the Florida Chamber Foundation released its Florida Workforce Needs Study (2021)⁹ and accompanying [Miami Metro Skills Report](#)¹⁰ which analyzes the Miami-Fort Lauderdale-Pompano Beach MSA. In the Miami Metro Skills Report the Foundation identifies and evaluates workforce skill gaps and opportunities that exist in the Miami Metro.

Researchers divided the workforce into “Career Areas” which groups workers by similarity of skills instead of industries. All career areas were then evaluated and compared to display the gap between workforce supply, employer demand, and deficiencies in skills training and core competencies in jobs where advertised wages exceed state averages. The criteria used to identify the target career areas include:

- High-volume shortages of in-demand competencies and skills observed in the career area.
- Advertised wage rates significantly exceeding state averages.
- Very strong historical job growth and expectation for continued growth as evidenced by high demand relative to supply.
- A wide array of career entry and growth opportunities supporting workforce transitions, training, and upskilling/reskilling initiatives.

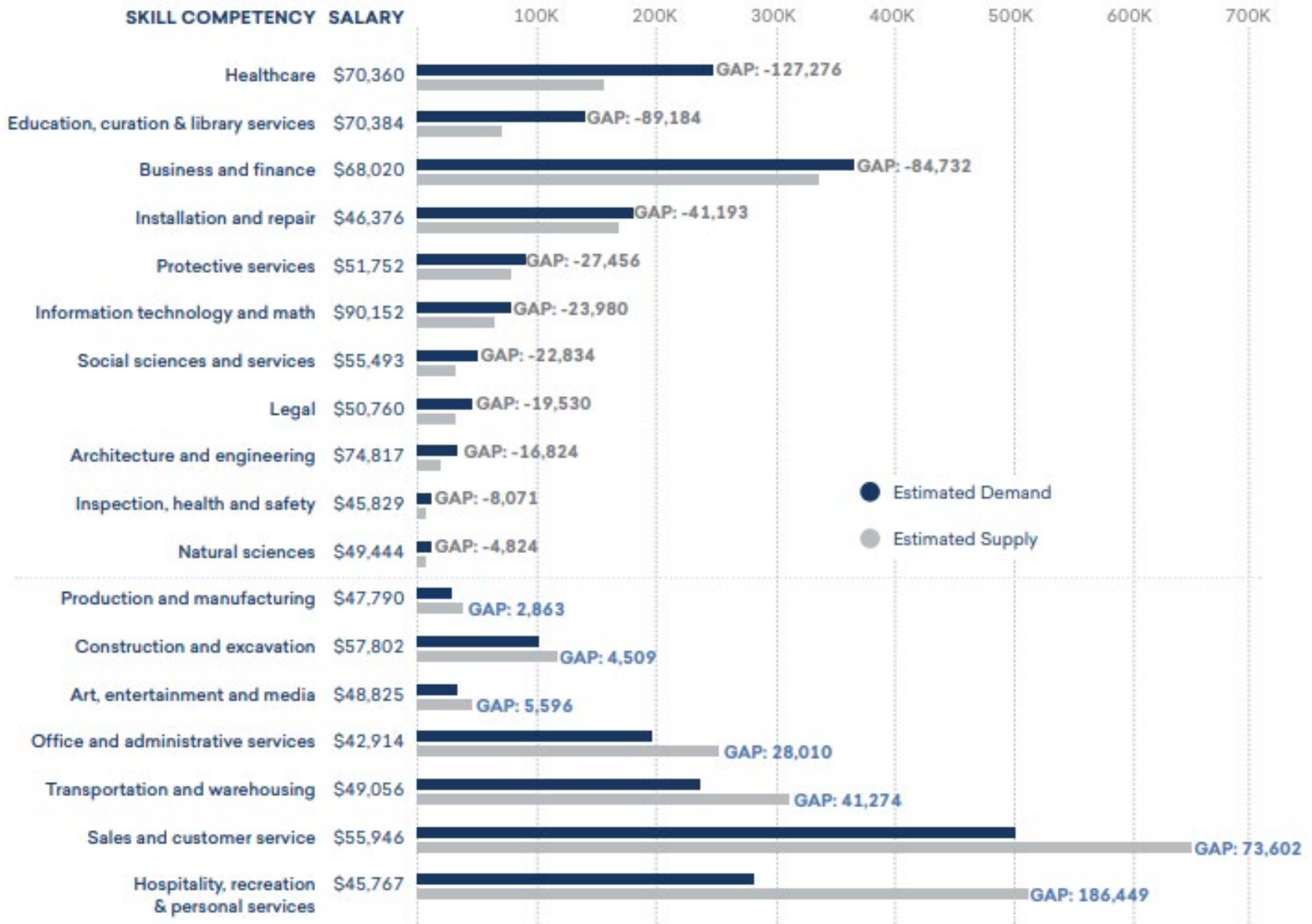
Their research found that 433,313 net new jobs need to be created by 2030 to meet demand in four Career Areas identified as careers where the demand for workers is greater than the supply. These are 1) Education / Curation / Library Services; 2) Business / Finance; 3) Healthcare; and 4) IT / Math. This information is provided courtesy of the Florida Chamber Foundation.

Workforce Development

The core of workforce development is the provision of high quality and targeted training for the workforce to match current and future business needs. A successful strategy to build a competitive labor force requires a comprehensive approach. The concept of workforce development is no longer confined to diverse training programs or employment opportunities. The ability of a region to offer connected, well-maintained, and convenient transportation and transit systems to enhance mobility; diverse and affordable housing; quality affordable child-care; quality educational opportunities; and other amenities are an important part of a successful and sustainable workforce development strategy.

Miami-Fort Lauderdale-Pompano Beach Supply and Demand by Career Area, with Median Posted Salary

LISTED IN ORDER OF DEMAND-SUPPLY GAP SIZE; BOTTOM LABELS INDICATE MEDIAN ADVERTISED SALARY FROM POSTINGS, TOP INDICATE DEMAND SUPPLY-GAP



Source: Emsi Skills

Courtesy of the Florida Chamber Foundation, June 2021

VISION STATEMENT

VISION STATEMENT

Increase regional prosperity by building *economic resilience*, fostering *equitable job creation*, increasing local *collaboration*, and building a more *diversified economy* and a *connected environmentally sustainable vibrant region*.

The SFRPC Comprehensive Development Strategy (CEDS) will inspire and guide the region, its leaders, and the SFRPC Economic Development District in creating a dynamic region that measures economic resilience broadly to include, but not limited to, expanding access to opportunity by all residents especially those in low-income communities; business retention, attraction, and entrepreneurial support; workforce development; mobility, access, and transit-oriented development (TOD); clean environment and resilient infrastructure; and regional collaboration. This strategy focuses on economic resiliency and recovery while building regional capacity; creating a stable and diversified economy; and improvements to the overall living environment for our citizens to create a more resilient, vibrant, equitable, and prosperous region.

IMPLEMENTATION ACTION PLAN

The South Florida CEDS provides a strategy for resilient regional development aligning with other county, municipal, and state strategic plans. Based upon their experience and analysis, the CEDS Strategy Committee Members and Work Group Members developed robust, detailed implementation action strategies that will address four priority goals during the next five years. This is a plan for region-wide collaboration, pulling together the Region's diverse strengths and

united energy to build upon South Florida's strengths and opportunities and address weaknesses and threats to South Florida's future.

This implementation plan will be utilized to help guide the selection of future economic development projects and investments as they are created to address critical barriers to regional economic prosperity. Each goal and objective are associated with tactics and specific actions to provide accountability and performance measurements.

CEDS STRATEGY COMMITTEE AND WORK GROUPS

The engagement of regional stakeholders played an integral role in the CEDS process. Council staff developed the foundation for the 2022-2027 CEDS update by comparing the approaches of other RPCs and considering local economic development priorities to assemble a highly qualified CEDS Steering Committee composed the region's top public, private, and non-profit leaders.

The CEDS Strategy Committee developed the plan's vision statement and strategies and identified potential implementation partners that will assist in the accomplishment of regional goals. Four subject matter expert Work Groups were created to address challenges and opportunities for economic diversification and develop strategies for training and shifting displaced tourism / leisure and hospitality workers into existing and emerging, higher wage industry clusters. These Work Groups tackled 1) Economic Diversification; 2) Business Attraction and Workforce Development; 3) Mobility and Access; and 4) Environment and Resilient Infrastructure.

Each Work Group conveyed their category's highest priority issues and strategies, identified priority projects, identified resource gaps, and

collaborated with their staff to return to the SFRPC a list of projects, challenges, and outcomes for success. The CEDS Committee and Work Group recommendations and action steps follow below. On the following pages please find the “Priority Goals for the South Florida Region” as identified by the Committee and Work Group members.



PRIORITY GOAL 1: CULTIVATE A COMPETITIVE ECONOMY AND FOSTER ECONOMIC MOBILITY



1.1. Maintain a Competitive Edge

- a. Support business incentives and programs to advance traditional and emerging industries, create local jobs, and increase competitiveness in a global marketplace.
- b. Routinely review and update current and nascent cluster analyses to identify workforce needs.
- c. Support high quality early childhood education (including family support services) and life skills trainings.
- d. Recruit top-notch faculty to higher education institutions and market the region to relocating firms.
- e. Enhance and support the regional airports and seaports.

1.2. Boost Entrepreneurial Development

- a. Invest in small business and scalable startup training incubators and accelerators.
- b. Integrate entrepreneurship into the K-12 curriculum at a young age to encourage entrepreneurship and development of an innovation mindset over time.
- c. Support existing entrepreneurial programs offered by academic institutions and other partners.
- d. Encourage new businesses, job creation, and investment within low-income communities to reverse negative trends, create equity, opportunity, and a more positive future for residents.
- e. Educate the community about the importance of attracting entrepreneurs and instilling an entrepreneurial mindset.

- f. Engage with the entrepreneurial population directly to create business events to retain them in the region.
- g. Market and prepare missing entrepreneurial resources including access to community-based funding, angel investment, venture capital, and ecosystems
- h. Collaborate and educate local municipalities to expedite new business permits

1.3. Invest in Workforce Development

Workforce development is a high economic development priority in South Florida. As noted in the Florida Chamber Foundation's 2021 Florida's Workforce Needs Study, a skilled and competitive labor force is key to the prosperity and sustainability of the economy.

If a region cannot offer a good quality of life for its workforce, workers may choose to relocate, especially those in high-skilled, high-demand fields. Likewise, increasing postsecondary education attainment without sufficiently increasing the jobs that require advanced talent simply furthers brain drain into regions and states where college-level and higher-skilled jobs are available.

- a. Support and invest in apprenticeship, internships, youth employment, existing educational credentials, micro credentials, and on-the-job training programs to create high paying jobs and address future building trade labor shortages.
- b. Connect the region's labor force with the necessary skills and trainings to create pathways for quality career opportunities in targeted industries of the region to fill in the workforce gap for high paying jobs.
- c. Connect existing workforce needs with upskilling opportunities of underemployed workers.
- d. Develop strategies to help close the gap between the region's employer needs and education.
- e. Create and build upon strategies that lead to a more inclusive labor market that support the growth of quality jobs.
- f. Strengthen resources and partnerships that support pathways to 21st century jobs.
- g. Expand programs that build soft skills alongside certification or training.
- h. Expand awareness of available workforce programs to local businesses and job seekers.
- i. Increase access to convenient transportation and transit systems to enhance mobility; diverse and affordable housing; quality affordable child-care; quality educational opportunities; and other amenities.

POTENTIAL IMPLEMENTATION PARTNERS

SFRPC CEDS Committee; Broward, Miami-Dade, and Monroe counties and municipalities; K-12 Public Schools; Academic & Research Institutions; Workforce Organizations; Chambers of Commerce; Children's Services Councils; Community- & Faith-Based Organizations; Miami-Dade & Broward Urban Leagues; Florida Department of Education; Hospitals; Industry Associations; Regional Employers; Youth Services; Community Foundations; Economic Development Organizations; Florida Department of Economic Opportunity

PRIORITY GOAL 2: CREATE VIBRANT AND CONNECTED PLACES TO INCREASE THE OVERALL QUALITY OF LIFE



2.1. Promote transit planning, implementation, and utilization to move people throughout the region

- a. Expand economically beneficial and safety-focused bicycle and pedestrian projects and facilities and support first and last mile connections to communities to include all modes of transportation.
- b. Assess current and future housing availability and its alignment with future growth and employment patterns.
- c. Support implementation/investment of a “South Florida Mobility Plan” including possible rail, rapid bus, and new technology.
- d. Support policies that incentivize transit and Transit Oriented Development (TOD) investments such as a mobility fees, tax increment finance districts, and increased density around transit hubs.



2.2. Mobility and Access

- a. Support placemaking investments in diverse communities throughout the region to meet the needs of residents.
- b. Accelerate investments in livable-walkable neighborhoods to increase safety and strengthen connections to key community resources.
- c. Provide access to affordable and safe transportation options.
- d. Support and/or facilitate infrastructure to accelerate electric, connected, and autonomous vehicles adoption.
- e. Leverage existing infrastructure through new technologies.

POTENTIAL IMPLEMENTATION PARTNERS INCLUDE, BUT ARE NOT LIMITED TO:

SFRPC CEDS Committee; Broward, Miami–Dade, and Monroe counties and municipalities; county & municipal transportation/transit agencies and planning departments; Florida Department of Transportation; Broward County Planning Council; Miami-Dade County TPO; Broward County MPO; Academic & Research Institutions; South Florida Regional Transportation Authority; Southeast Florida Transportation Council (SEFTC); Brightline; Regional Employers; Economic Development Organizations; Industry Associations

PRIORITY GOAL 3: DESIGN, CONSTRUCT, AND MAINTAIN RESILIENT INFRASTRUCTURE TO SUPPORT SUSTAINABLE BUSINESS AND POPULATION GROWTH



3.1. Water/Wastewater/ Stormwater/Solid Waste

- a. Work proactively with local governments, state agencies, and other relevant groups to identify causes of water pollution and coordinated strategies to alleviate them.
- b. Investigate opportunities for future water, wastewater, and stormwater system expansion, hardening, coordination, connection, and/or interconnections to achieve regional resilience, resource optimization, and environmental priorities.
- c. Reduce barriers and increase accessibility to more diverse alternative water sources through utilities (rainwater, greywater, stormwater, and recycled/reused water and the Floridan Aquifer).
- d. Support financial models and funding strategies addressing regional stormwater management, including support to funding alternatives to advance projects identified as part of the upcoming Central and Southern Florida Resilience Studies being initiated by the U.S. Army Corps of Engineers (ACE) and the South Florida Water Management District as the local sponsor.
- e. Support innovative activities and collaborate with South Florida communities to manage and reduce Solid Waste.

3.2. Housing

- a. Educate policy makers, staff, and additional stakeholders about the role quality affordable housing plays in support of a healthy economy.
- b. Increase density housing along transportation corridors and around TOD mobility hubs through partnerships with the public and private sectors.



- c. Encourage zoning changes of commercial areas to include multifamily residential development.
- d. Support new and current financial incentives for affordable and workforce housing.
- e. Advocate for legislative changes and solutions to curb skyrocketing homeowner and flood insurance policy premiums.

3.3. Sustainable Land Development Patterns

- a. Support programs and investments that match public and private land use and development decisions with existing and planned infrastructure investments.
- b. Educate governments, citizens, and developers on the importance of investing in green and climate-resilient infrastructure.
- c. Inventory available properties that need restoration and/or preservation, including brownfields and historic districts and resources.

3.4. Proactively Plan for Natural Disasters / Economic Shocks

- a. Align regional planning efforts with local Pre-Disaster Mitigation Plans, Local Emergency Planning Committee, South Florida Water Management District, Southeast Florida Regional Climate Change



- Compact, Florida Division of Emergency Management, and other partners to enhance local and regional preparedness, mitigation, and response due to sea level rise, tidal flooding, storm surge, and saltwater intrusion.
- b. Develop a list of critical wetlands for protection using the Land Acquisition Trust Fund based on the critical ecological value of wetland and vulnerability to development.
- c. Enhance and protect the environment and the region's natural resources.
- d. Educate local governments on the importance of effective land use planning, zoning code updates, incentive programs, and the development of disaster-specific structure design to better prepare for likely shocks.
- e. Create financing opportunities for resilient infrastructure and have a coordinated public private investment.
- f. Create public private partnerships to pilot innovative resilience solutions including dedicated funding pools.
- g. Collaborate with nonprofits and academic institutions to commercialize research on resiliency.

POTENTIAL IMPLEMENTATION PARTNERS INCLUDE, BUT ARE NOT LIMITED TO:

SFRPC CEDS Committee; Broward, Miami-Dade, and Monroe counties and municipalities; local planning and utilities departments; Southeast Florida Regional Climate Change Compact; Academic Research Institutions, Florida Department of Environmental Protection; South Florida Water Management District; Florida Housing Coalition; Industry Associations; Community Foundations; Florida Advisory Council on Climate and Energy; Economic Development Organizations; Florida Department of Agriculture and Consumer Services

PRIORITY GOAL 4: PROMOTE REGIONAL COLLABORATION OF INTERGOVERNMENTAL, PUBLIC-PRIVATE, INTERAGENCY, AND NON-PROFITES TO ADDRESS SOUTH FLORIDA'S ECONOMIC CHALLENGES



4.1. Strengthen partnerships with existing regional organizations and explore opportunities for joint projects

- a. Using the SFRPC as a liaison and communicator, enhance understanding of regional issues and areas of partners expertise among the region's public, private, non-profit, and philanthropic sectors.
- b. Host and engage regional roundtables around topics of mutual interest and prioritization and growth of regional economic clusters.
- c. Encourage widespread use of design charrettes and other venues for public input into project development.
- d. Improve internal communications among all government agencies and stakeholders and support external communications processes through partners.
- e. Engage the business community (including major employers), nonprofit sector, academic institutions, elected officials, and government staff (city managers, county administrators, ports/airports) to implement the CEDS.
- f. Encourage coordination with the South Florida Regional Planning Council to increase focus on regional resilience and attract critical investment to the seven-county Southeast Florida Region.

POTENTIAL IMPLEMENTATION PARTNERS INCLUDE, BUT ARE NOT LIMITED TO,

SFRPC CEDS Committee; Broward, Miami-Dade, and Monroe counties and municipalities, Academic & Research Institutions; Industry Associations; Community Foundations; Economic Development Organizations; South Florida Business Council; Broward Workshop and other private-sector business leaders, elected officials, county and city administrators & managers; Ports/Airports; Non-Profit Organizations; Small Business Administration

ECONOMIC RESILIENCE

The creation of a resilient economy is a long-standing priority of the South Florida EDD and U.S. EDA. Resiliency has many facets with a wide range of contributing factors including literacy, educational attainment, transportation, housing, a wide range of infrastructure, general affordability (insurance, utilities, child-care, etc.), health, and family, social, and community influences. In South Florida climate resilience is recognized as an integral component of economic resilience and has been an area of significant effort and investment for more than a decade. In recent years the state of Florida has undertaken significant planning and investment to augment local efforts in South Florida and other areas of the state to advance resilient communities and economy initiatives.

Economic resilience refers to the ability of local economies to “bounce back” to normal conditions after losing function because of an uncontrollable event. Resilient economies have the capacity to quickly respond to, withstand, and recover from adverse situations such as a public health crisis or high intensity storm events. As a coastal region bordered by the Atlantic Ocean on the east, the Everglades and wetlands on the western edge of Miami-Dade and Broward counties, and the Gulf of Mexico on the western side of Monroe County, South Florida is an environmentally vulnerable region susceptible to intense flooding and other damage from tropical weather systems and hurricanes. As demonstrated by Hurricane Andrew (1992), Hurricane Katrina and Hurricane Wilma (2005), and most recently Hurricane Irma (2017), the region faces potentially devastating physical, economic, and community damage when a powerful hurricane makes landfall in South Florida.

“Resilience” became an increasingly important concept with the onset of COVID-19 pandemic in South Florida in March 2020. The COVID-19

pandemic dramatically exposed the region’s economic inequality and the underlying weaknesses of the economy. While all economic sectors in South Florida were affected, the Leisure & Hospitality industry, a major employer of low-income workers, was the hardest hit sector in terms of employment loss and a decrease in economic activity. This industry basically shut down as in person interactions were limited or outright banned. Some of the region’s workers were able to transition smoothly to remote work without disruptions to their employment, but others could not.

The South Florida Regional Planning Council received funding from the U.S. Economic Development Administration (EDA) in August 2020 to support economic resilience efforts across the region directly related to COVID-19. With this funding SFRPC focused staff resources toward COVID-19 response, recovery, and long-term planning. The final Economic Resilience Plan was a coordinated effort to develop a strategic plan aligned with the CEDS for South Florida to address recovery from the economic shock of COVID-19, future pandemics, and similar economic shocks.

The stakeholders identified the highest priority issues in each of the four Focus Areas, set goals and objectives, and listed priority projects to address needs, goals, and objectives. Please refer to Appendix 1 for stakeholder recommended projects, project outcomes, possible action partners, successful outcomes. To build a regional capacity for economic resilience, a network of partner organizations and individuals must anticipate risk, evaluate how that risk can impact critical economic assets, and build a responsive capacity.

Anticipated Outcomes of Proposed Projects (Appendix 1)

1. Create a fully staffed and operational training facility which can serve as an Emergency or Security Operations Center responding to disasters (pre, during, post) and improve

- training and communication channels for government and other local agencies.
2. Provide innovative solutions and digital technologies that will help resource constrained governments and regulators address capacity challenges and improve regulatory capacity, service delivery, and crisis management.
 3. Augment and enhance support services in the areas of job training, childcare, success coaching, education, social services, and assist with work-related needs to transition low income, structurally unemployed individuals to living wage jobs and career pathways.
 4. Advance equity by assisting resident entrepreneurs from low-wealth communities in launching sustainable businesses that will generate and build generational and community-based wealth.
 5. Develop much-needed talent skills pipelines that will advance the design and implementation of new programs including degrees and certifications to attract new talent, and train and retain local talent.
 6. Create new technologies, recruit new companies, and generate scaling of early stage and young startup companies that will bring job creation.
 7. Provide multimodal connectivity and create an interconnected system of transit and transportation opportunities that are easily accessible to all residents.
 8. Secure regional grant funding which can be used for program development (degrees, certifications, short courses, seminars, workshops, event), Research & Development, “Train the Trainer” programs, the creation of new technologies etc. through enhanced regional collaboration and diverse partnerships.
 9. Fuel innovation and entrepreneurship in coral restoration technology.

- a. Incubation of novel coral restoration technology, bringing together the technology and coral restoration sectors.
 - b. Accelerator to commercialize technologies for use in public and private coral restoration industries within and beyond Florida.
10. Planning for next steps in further developing a technology-driven ‘coral restoration economy’ for South Florida.
 11. Create opportunities for job creation in both tech and environmental restoration and increase investment opportunities in the field

South Florida’s high concentration of businesses and workforce in the Hospitality & Leisure sector makes our economy exceptionally vulnerable to high impact events that adversely affect tourism such the pandemic, natural disasters, inflation, etc. In building South Florida’s economic resilience, it is critical that economic development organizations and regional stakeholders continue efforts to reduce overreliance on the Hospitality & Leisure sector through education, training, and attracting a skilled workforce into higher paying industries. Creation of a connected, vibrant region that is supported by robust infrastructure and multimodal mobility network is needed as well. Communication and collaboration are keys to success. Government agencies and other regional stakeholders need to establish a process for regular communication, monitoring, and updating of business community needs and issues.

Climate Change / Sea Level Rise and Natural Disasters

South Florida's economic resilience is dependent, in significant measure, on the region's ability to mitigate and adapt to sea level rise and climate change while continuing to grow the regional economy. The region's leading business leaders and chambers of commerce, organized as the South Florida Business Council, are working closely with each other and elected leaders, the Southeast Florida Regional Climate Change Compact, and SFRPC to develop strategies to strengthen regional economic resilience.

the short term, the Southeast Florida Regional Climate Change Compact in its [2019 Unified Sea Level Rise Projection – Southeast Florida](#)¹¹ estimates that sea level rise will be 10 to 17 inches by 2040 and 21 to 54 inches by 2070 (above the 2000 mean sea level in Key West, Florida). In the long term, sea-level rise is projected to be 40 to 136 inches by 2120. The adjacent chart presents estimates from the Intergovernmental Panel on Climate Change (IPCC) and the National Oceanic and Atmospheric Administration (NOAA).

Proactive efforts to address climate change – both in building resilience and reducing damaging gasses such as CO₂ and Methane – represent specific economic development opportunities for the region.

These efforts will serve to preserve and enhance existing businesses and industries critical to a diverse economic base. The Southeast Florida Regional Climate Action Plan (DRAFT RCAP 3.0), currently under development, contains Goals and Recommendations in 11 diverse topic areas including Regional Economic Resilience.

Its Guiding Goal is to “Strengthen regional economic resilience, integrity, and opportunity through the involvement of elected and business leadership, and the advancement of public and private investments that mitigate climate risks and foster innovative solutions.

GOAL:

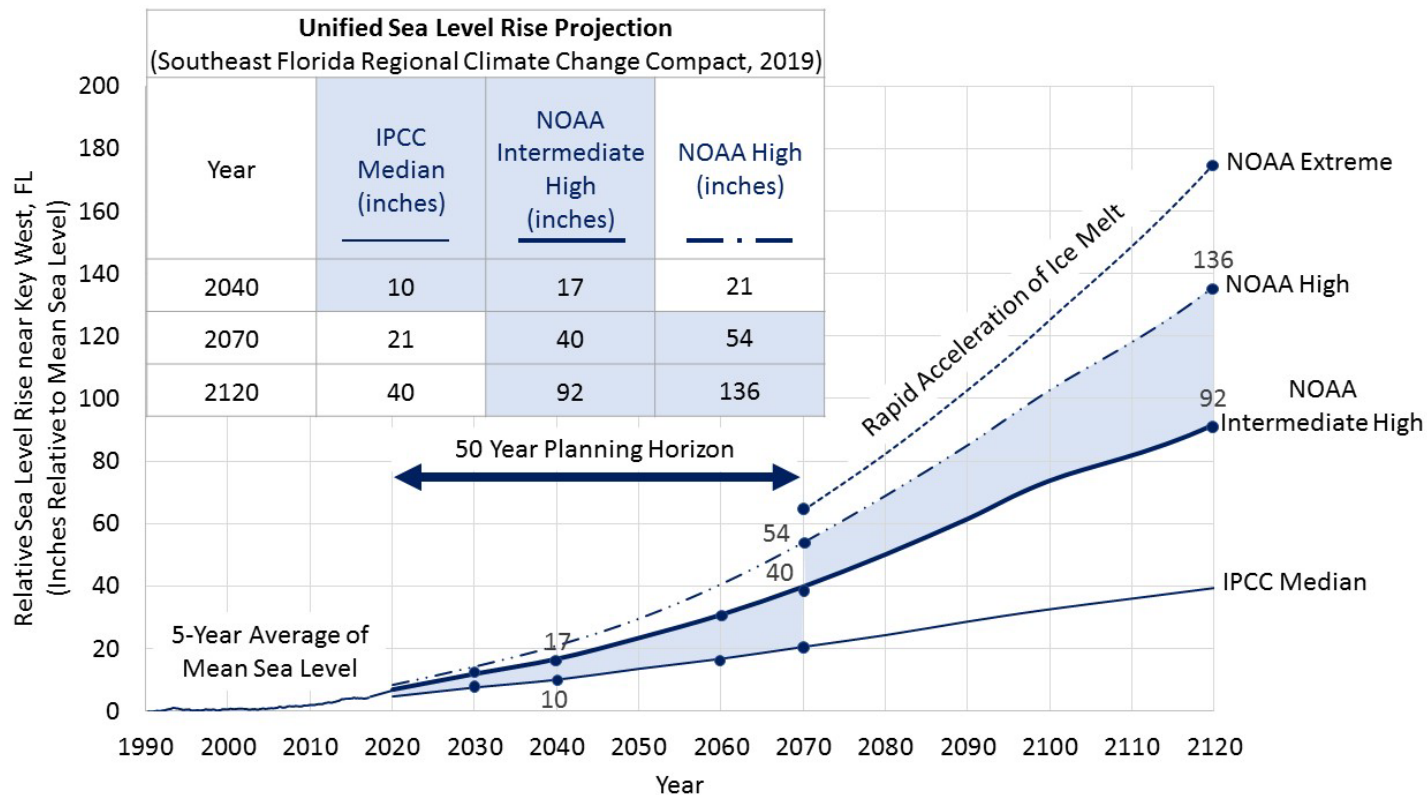
Strengthen regional economic resilience, integrity, and opportunity through the involvement of elected and business leadership, and the advancement of public and private investments that mitigate climate risks and foster innovative solutions.

RCAP 3.0 (DRAFT)

Economic Resilience Recommendations

- ER-1 Establish a regional economic resilience marketing strategy
- ER-2 Advance regional resilience standards and infrastructure improvements
- ER-3 Seek federal and state engagement to reduce flood risk.
- ER-4 Integrate climate resilience and economic development at the regional level
- ER-5 Improve understanding of the compounding role of climate change and sea level rise in the affordable housing crisis in the region. Identify opportunities for integrated solutions that center equity, prevent displacement, and bolster economic development.
- ER-6 Identify diverse funding, financing institutions, and strategies that facilitate equitable resilience investments.
- ER-7 Advocate for effective and affordable risk management strategies.
- ER-8 Serve as a model for national climate resilience.

Source: <https://southeastfloridaclimatecompact.org/regional-climate-action-plan-rcap-3-0-development/>



Source: <https://southeastfloridaclimatecompact.org/regional-climate-action-plan-rcap-3-0-development/>

In recent years, extreme heat has become an increasingly important concern. Findings from the report [EXTREME HEAT The Economic and Social Consequences for the United States](#), produced by the Atlantic Council’s Adrienne Arsht Rockefeller Foundation Resilience Center, states that extreme heat is the number one cause of death related to climate change. One of the economic and societal consequences of extreme heat is labor productivity losses, particularly in industries involving outdoor work or in environments that are not air-conditioned such as agriculture, construction, trade and logistics, transportation, warehousing, and certain sectors of the hospitality and leisure such as outdoor tourist attractions or parks.

The second effect is health outcomes with extreme heat being the leading cause of death in the United States. The serious consequences of extreme heat have more recently come into greater focus with average temperatures expected to increase, creating the potential for longer and hotter heatwaves. Since 1970, Miami-Dade County has had an average increase of days above 90°F from 84 to 133 days per year and 152 days per year for Broward County (Sources [Beat The Heat Broward \(arcgis.com\)](#) and [Extreme Heat Protection Efforts - The Miami Foundation](#)) and this will continue to rise. It is estimated that extreme heat causes \$10B annual economic costs to Miami-Dade alone with a projected increase to \$20B by 2030. Labor productivity losses for the

State of Florida are estimated to be \$11 billion a year and are expected to increase to \$52 billion by 2050.

Federal, state, and local governments are making significant investments in both planning and infrastructure to grapple with the mounting impacts of climate change. Demonstrating its commitment to water resources, the State of Florida invested \$1.2 billion for Everglades restoration and the protection of Florida's water resources in FY 2022-2023. This appropriation in the Everglades Restoration and targeted water quality improvements brings the total investment for the past four year in these areas to more than \$3.3 billion, more than double the investment of the previous four years.

Additionally, in FY 2021-2022 the Florida Legislature created, and Governor DeSantis approved, the Resilient Florida Grant Program with federal and state funding of more than \$640 million. The State's Resilient Florida Program included 76 projects totaling more than \$270 million for the three-year Flooding and Sea Level Rise Resiliency Plan, nearly \$20 million for 98 projects in planning grants and over \$404 million for 113 environmental resiliency projects across the state. The FY 2022-2023 Budget invests over \$500 million for resiliency, \$50 million for beach nourishment and inlet management, and \$30 million for state park beach nourishment.

Central & Southern Florida Project

A key to economic resilience in South Florida is the proposed Central and Southern Florida Flood Resiliency Study. The Central and Southern Florida Project (C&SF) was authorized by Congress in 1948 – more than 70 years ago- and has served as an invaluable contributor to the economic success of south Florida, particularly Miami-Dade, Broward, and Palm Beach counties. However, it was designed to deliver flood protection for 2 million residents, not the 11 million it currently serves or the estimated 15 million the C&SF is expected to

serve in 30 years. Today the C&SF system is under substantial stress due to changes in the physical environment, especially increased rainfall intensity and rising sea levels. Stormwater severely strains the system and sea level rise significantly threatens project operations.



Courtesy of Broward County, King Tide in Hollywood

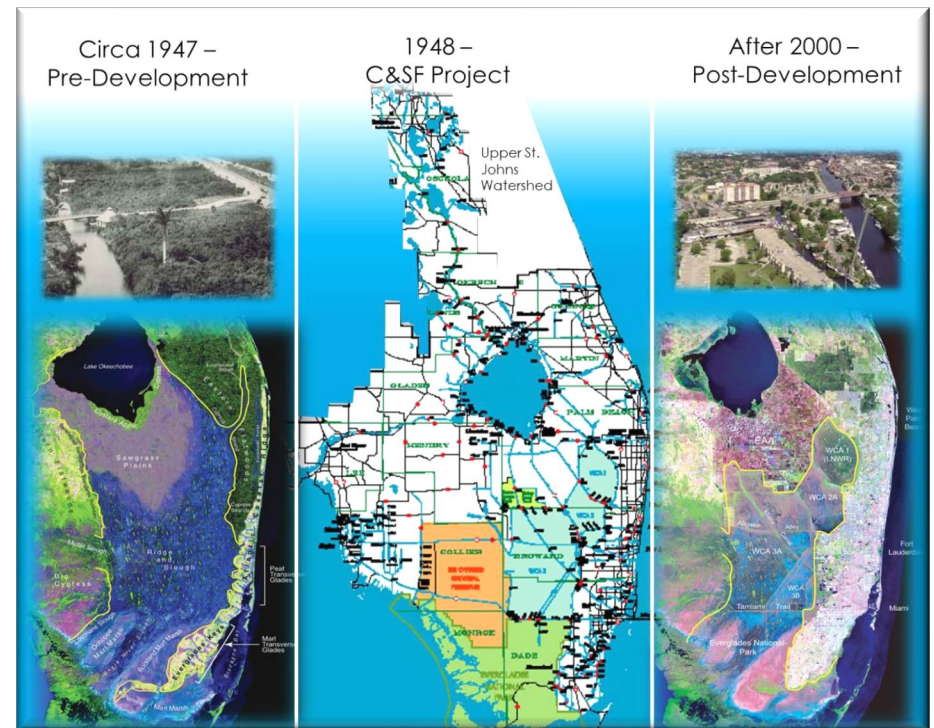
It is important to understand that central and southern Florida was carved out of the historic Everglades. Drainage Canals were built to drain the land to make the land suitable for agriculture and to prevent flooding. These canals generally drain the land by catching rainwater and sending it through the canals to the Atlantic Ocean. These canals are primarily gravity-based, meaning that they drain because the inland water is higher than the Ocean water, so gravity is sufficient to accomplish the draining. However, as Sea Level rises, it is becoming more and more difficult to drain the inland areas after times of high rain, particularly during high tide. Extreme high tide events already preclude operation of many of the flood control gates in the system.

Higher sea levels associated with high tide events have already reduced the operational capacity of many flood control gates and coastal structures in the C&SF water management system. Recent studies, performed by the South Florida Water Management District (SFWMD)¹² and the United States Army Corps of Engineers (USACE)¹³ in 2020 and August 2022 respectively, determined that 20 C&SF coastal structures are experiencing full bank elevation at upstream canals during a 25-year / 4 percent annual exceedance probability surge with 1 foot or less of sea level rise, meaning that stormwater discharges capacity to tide are limited, resulting in reduced flood protection level of service in the entire upstream drainage basins. Local investment in resilience from land use to design standards and infrastructure improvements are dependent upon the effective functioning of the C&SF Project.

The South Florida Water Management District and the U.S. Army Corps of Engineers executed a feasibility study partnership agreement on September 21, 2022 to advance the Central and Southern Florida Flood Resiliency Study under Section 216 of the Flood Control Act of 1970. This study analyzes the current Central and Southern Florida Project (C&SF Project), that laid the groundwork for the series of flood protection canals that exist today.

Advancing the study is justified by the changing physical conditions already impacting the original project purposes, including land development, population increase, sea level rise and climate change. It assesses which infrastructure is at the highest risk of impact from a changing climate, water supply needs, and surge protection. A phased approach is being proposed, focusing on the critical project features and coastal structures which can reduce the most immediate flood risk, based on a broad C&SF system overview, resulting in actionable recommendations to Congress.

This initial study will focus most immediately on improvements needed at the salinity control structures, with a comprehensive evaluation of the project still pending a broader authorization. Additionally, the amount of money needed to complete study recommendations will likely be in the billions of dollars. The Army Corps has stated that the best-case scenario is to have initial projects constructed in 15 years, assuming full funding, while sea level rise is anticipated to further obstruct drainage and flood protection in the ensuing years. Additional exposure includes saltwater infiltration of South Florida's potable water supply via the aquifer if existing salinity control structures on the canals cannot keep saltwater at bay.



Courtesy of the South Florida Water Management District

Water & Wastewater Infrastructure

As noted previously, all three counties are low-lying with very little elevation. Low elevations combined with the area's limestone ground makes the region exceptionally susceptible to the impacts of sea level rise. Traditional coastal solutions for addressing sea level rise, such as sea walls, are limited in their effectiveness in South Florida since sea water can rise through porous limestone and under sea walls. Adaptation plans call for more pumps, back-flow preventers to keep water from flowing into the systems, higher sea walls, water retention areas, and wells to store storm water runoff and enhance drainage and flood control.

Sewage systems, roads and homes are at risk of flooding and damage due to the rising water levels. South Florida's antiquated drainage system is a "gravity fed" system meaning that when water rises, the system ceases to function. The impacts are most acutely felt during the fall months when king tides are prevalent and ocean pressure backs up through pipes, pushing saltwater above ground. The presence of numerous septic tanks throughout the region creates an exceptionally challenging situation as it relates to sea level rise. As sea levels rise the septic tanks can no longer drain properly, consequently sending dirty water into groundwater, surface water, or marine water and, at times, sending sewage into yards and homes. The overflow carries nitrogen, phosphorus, bacteria, viruses, and pharmaceuticals into the groundwater and ultimately surface waters. The sewage causes both public health problems and contributes to demise of the coral reefs. The costly challenge of converting septic tanks to centralized sewage systems has long plagued the region.

Most properties in Monroe County are now connected to a municipal sewer system since being ordered by the State of Florida to convert its 33,000 septic and cesspits to centralized sewer systems. In Broward County there are an estimated 67,000 septic systems in use.¹⁴ The

Broward County Water Advisory Board has highlighted septic systems as a top priority for connection to central systems and is working with municipal governments to achieve this.

In 2020 Miami-Dade County, in its report *Septic Systems Vulnerable to Sea Level Rise Plan of Action Report*¹⁵, estimated it would take \$3 billion for the county to make the switch from septic tanks to sewer systems, and it was stated that as many as 56% of septic tanks in Miami-Dade are not working properly at times. To improve the resiliency of the region's wastewater infrastructure, local government officials in Miami-Dade recently announced \$230 million in funding to convert 13,000 of the 120,000 septic tanks in the county to municipal wastewater infrastructure within the next 5 years. Additionally, the Florida Department of Environment and Protection will make funding available for low-income households to make the costly connections from their homes to the newly installed municipal infrastructure. This initial step to convert more than 10% of the septic tanks is a critical step to making the region's infrastructure more resilient to climate change.

POPULATION TRENDS

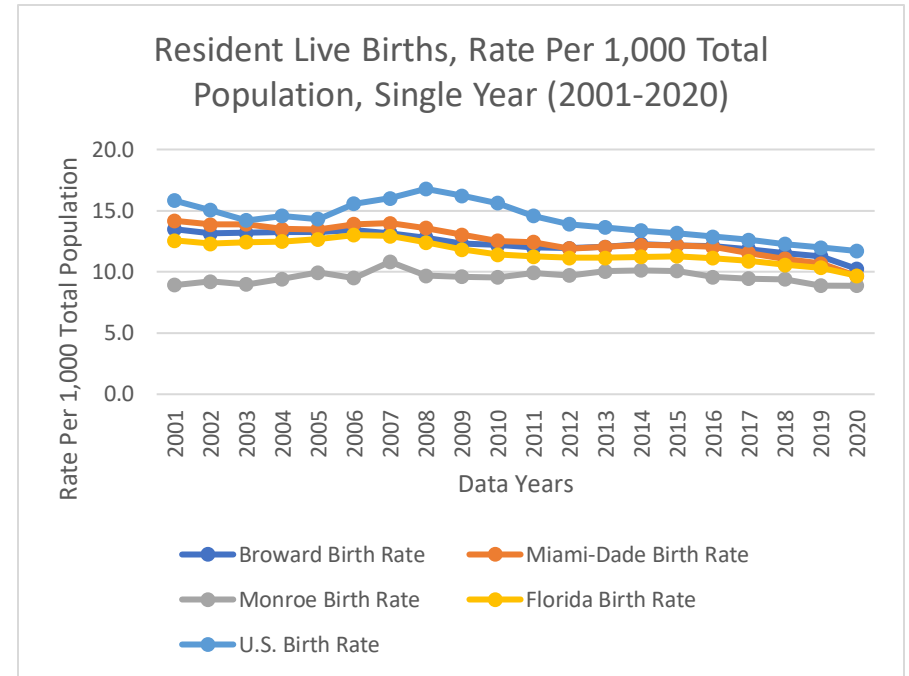
Continued Growth

South Florida had a population of 4.7 million in 2020. According to the Florida Office of Economic and Demographic Research, the region is projected to add about 717,000 new residents in the tri-county area through 2045 to reach an estimated population of 5.4 million. The regional economy and number of residents who call South Florida home has consistently increased over time. Between 2010 and 2020 the population of Broward County grew by 11.7% and Miami-Dade County by 8%, outpacing the growth of the nation.



Meanwhile, Monroe County’s population remained relatively unchanged. Despite significant population growth from 2010 – 2020, the most recent Census data update for the period of July 2020 – July 2021 shows Resident Live Births declined for Miami-Dade and Broward counties.

The Resident Live Births Rate (RLBR) per 1,000 total population has declined from a high of 13.5 in Broward in 2001 to 10.2 in 2020. Likewise, the Miami-Dade RLBR has declined from 14.2 in 2001 to 9.7 in 2020. Monroe County had a RLBR 8.9 in 2001. Monroe County’s RLBR peaked to 10.8 in 2007 and then declined to 8.9 in 2020; the same rate as in 2001¹⁶. This compares to a Florida RLBR of 12.6 in 2001 and 9.7 in 2020 with the U.S. RLBR dropping from 15.83 in 2001 to 11.71 in 2020.



Even as Florida’s population increased from April 2020 to July 2021, the population of Miami-Dade, Broward, and Monroe counties decreased during the same time period.

Population Estimates				
	Miami-Dade	Broward	Monroe	Florida
July 1, 2021	2,662,777	1,930,983	82,170	21,781,128
April 1, 2020	2,701,767	1,944,375	82,874	21,538,187
April 1, 2010	2,496,435	1,748,066	73,090	18,801,310

Source: U.S. Census Quick Facts

This recent population decline, masked partially by international migration, is attributable to lower birth rates and a trend of out-migration from Miami-Dade and Broward counties. It appears that this out-migration may be in response to soaring housing and cost of living costs. According to annual reports from United Van Lines, U-Haul,

and Allied Van Lines, Florida, with its beaches and natural environment, no income tax, and cultural and recreational opportunities is consistently once again in the top 5 of inbound states with 39.29% of respondents choosing Florida as a top state to retire in 2020.¹⁷ For those who can work remotely, the broad adoption of remote work policies has made it possible to live in one state and work in another.

The major van lines report that the pandemic continues to influence American’s decisions to move as they relocate to lower-density communities and to be closer to family. Florida is particularly attractive to high-income earners seeking to exit high cost, high tax states who find Florida relatively affordable despite rising housing and living prices. Florida was a top inbound state in 2021 although it appears that growth is concentrating outside of South Florida. South Florida is a popular destination for residents from California and New York and is expected to benefit from high-earning professionals relocating from high-cost, higher-density cities in the Northeast and West Coast who still seek to enjoy an urban lifestyle.

Age & Diversity

The age distribution of the population in Broward, Miami-Dade, and Monroe shows significant increases in the 45 – 64 year-old age cohort over the past 30 years. All the counties also show a decline in the percent of the population in the 18 – 44 year-old category. Miami-Dade and Broward counties also show decreases in the percent of the population in the 0 – 17 cohort as well as increases in the percent of the population in the 65 plus cohort signaling a potential workforce shortage in the future. The population age trends of Miami-Dade and Monroe counties mirrors that of the state of Florida. Only Broward County shows an increase in the percent of the population in the 0 – 17 cohort and a decline in the 65 plus cohort, although this is only true

over the 30-year analysis as Broward joined Miami-Dade and Monroe in decreases in the 0-17 cohort over the last 20 years.

Age Distribution (Percentage) of the Population of Florida and Its Counties 1990 to 2020

		Percent of Population			
		2020	2010	2000	1990
Broward	0-17	21.2	22.4	23.6	20.6
	18-44	34.7	35.6	38.6	40.2
	45-64	27.4	27.7	21.7	18.6
	65+	16.7	14.3	16.1	20.7
Miami-Dade	0-17	20.4	21.9	24.8	24.3
	18-44	36.3	38.5	40.1	41.5
	45-64	27	25.6	21.7	20.3
	65+	16.3	14.1	13.3	13.9
Monroe	0-17	15.3	15.1	17.1	17.5
	18-44	30.8	32.5	37.4	43
	45-64	31.5	35.4	30.9	23.7
	65+	22.4	17.1	14.6	15.8
Florida	0-17	19.9	21.3	22.8	22.3
	18-44	33.3	34.4	36.9	39.8
	45-64	26.3	27	22.7	19.7
	65+	20.5	17.3	17.6	18.2

Percentages may not add to 100% due to rounding

Sources: U.S. Census Bureau (2020, 2010, 2000, and 1990 Census)

Percentage of Foreign Born Persons (2016-2020) ACS	
Broward	34.3%
Miami-Dade	54.0%
Monroe	19.8%
United States	13.5%

Sources: Census 2016-2020 ACS

South Florida’s population is diverse, with many people arriving in the region from other places. According to Census data from the 2016-2020 American Community Survey, 54% of the population in Miami-Dade

was foreign born; 34.3% of persons in Broward County; and 19.8% in Monroe County compared to the U.S. average of 13.5%.¹⁸ The gender of residents is almost evenly split in all counties.

The median age in Broward and Miami-Dade is 40.5 and 40.2 respectively with a median age of 47.9 in Monroe County. This compares to the median age of the United States of 38.1. The median age of foreign-born residents is higher in South Florida than the United States foreign-born residents median age of 45.7. This compares to a foreign-born median age of 49 in Broward County, 50 in Miami-Dade County, and 46 in Monroe County.

Historically, an older population is an indicator of a decrease in the proportion of working-age population and labor force growth rate.¹⁹ However, a 2019 analysis of Census Data by The Associated Press – NORC Center for Public Affairs Research found that seniors in major metropolitan areas are more likely to continue working past age 65 than in other areas of the country.²⁰ Older workers are often a benefit to regional economies providing additional talent, expertise, and consumer spending particularly during a time of low unemployment.

The low unemployment rate in South Florida has made it difficult for employers to find qualified employees for their businesses. According to Goldman Sachs, this gap between job openings and available workers is a contributor to inflation. A drop in immigration in 2020 due to the pandemic and policy changes left the work force 1.6 million workers smaller and pushed the gap wider. A 2022 study by Goldman Sachs Research suggests that an increase in foreign-born workers could help close the gap between contain the rise in wages and prices²¹.

The ethnic and racial composition of South Florida's population continues to grow more diverse. Nearly 40% of the region's population is of Hispanic origin. This ethnic group, which can be of any race,

continues to grow more diverse with large communities from Central and South America, the Caribbean, Mexico, and Puerto Rico.

The Cuban community is historically the largest Hispanic group, although its percentage of the overall Hispanic population has slowly decreased as other Hispanic populations grow. The Black population in South Florida includes not only African Americans but also large communities from the Caribbean and Latin America. In 2020 the Black population represented 16.8% of the overall population. The growing and highly diverse population is an asset for the region's competitiveness in the global economy. It provides a multi-ethnic, multi-lingual workforce and culturally diverse environment for businesses and international companies.

South Florida's veteran community represents 5% of Florida's veterans or 71,574 veterans living in Broward County, 47,227 veterans in Miami-Dade, and almost 6,400 veterans in Monroe County. While a small part of the overall population of the region, this population may require specialized services and attention.

EDUCATION

Educational Attainment

Education is a key component of economic competitiveness, equity, and economic mobility. Monroe and Broward counties populations show higher percentages of persons age 25 or older with a high school degree or higher at 91.9% and 89.4% respectively. Miami-Dade County has a significantly lower percent of the population possessing a high school degree or higher at 81.8% compared to 88.5% of the U.S. population age 25 or higher. The percent of the population with a bachelor's degree or higher in Miami-Dade County at 30.7% lags behind the national average of 32.9%, where Broward and Monroe

counties show similar and higher rates of population with Bachelors' degrees or higher at 35.3% and 33.1% respectively.²²

K-12 Enrollment & Diversity

Miami-Dade County Public Schools is the 4th largest school district in the nation with nearly 400 schools and a diverse K-12 enrollment of more than 350,000 students from over 160 countries. Broward County is the 6th largest school district in the nation with 330 schools and more than 256,000 K-12 students from more than 170 countries. The Monroe County School District is home to 16 learning institutions serving almost 9,000 K-12 students. Additionally, there are 703 private schools, many religiously affiliated, serving the tri-county area. Florida Families can choose from seven main types of schools for K-12 education: traditional public schools, public charter schools, public magnet schools, private secular schools, private faith-based schools, online academies, and homeschooling.²³

A review of public-school enrollment data for Florida, Miami-Dade, Broward, and Monroe counties comparing 2017-2018 to 2021-2022 indicates that, except for Monroe County, overall enrollment in the public school system in Florida, Miami-Dade, and Broward steadily decreased from 2017 to 2022. In Florida, all charter schools are part of the Public School system, although they operate largely independently of local School Boards. In Florida and in South Florida, the overall number of students in charter schools increased as non-charter public school enrollment decreased.

By the race and ethnicity definitions adopted by the Florida Department of Education these definitions the Broward County School District is somewhat more diverse than the Miami-Dade County Public Schools District. "Whites" have decreased in all three counties, "Blacks" have decreased in Miami-Dade and Broward, with Broward County Public Schools having the greatest number of Asians and

Pacific Islanders. Hispanics in Miami-Dade County Public Schools are by the far the largest population while in Broward Public Schools, there are somewhat more Blacks than Hispanics. In Monroe County, both Blacks and Hispanics are growing in number. While these statistics do not account for the difference between race and ethnicity, there is a growing concern about re-segregation in public schools. During 2017-2018 the number of white students decreased from 6.9% to 6.3% of the student population in Miami-Dade; 20.5% to 17.8% in Broward County; and 45.6% to 43.9% in Monroe County.

	K-12 Enrollment			
	2017-2018	Percentage	2021-2022	Percentage
Florida				
Charter	295,814	10%	361,939	13%
Non-Charter	2,573,301	90%	2,471,240	87%
Total	2,869,115		2,833,179	
Broward				
Charter	45,799	17%	48,574	19%
Non-Charter	226,157	83%	207,463	81%
Total	271,956		256,037	
Miami-Dade				
Charter	62,296	18%	77,675	24%
Non-Charter	289,544	82%	251,900	76%
Total	354,840		329,575	
Monroe				
Charter	1,113	13%	1,160	13%
Non-Charter	7,387	87%	7,691	87%
Total	8,500		8,851	

Source: <https://edudata.fl DOE.org/AdvancedReports.html>

K – 12 ENROLLMENT DATA

State of Florida Public Schools

Year	Total Enrollment	White	Black	Hispanic	2 or More Races	Asian	Other
2017-18	2,869,115	1,077,904	626,568	938,248	99,333	77,817	49,245
2021-22	2,833,179	1,021,740	602,424	1,004,441	113,466	79,142	11,966

Miami-Dade County Public Schools

Year	Total Enrollment	White	Black	Hispanic	2 or More Races	Asian	Other
2017-18	354,840	24,327	72,670	251,572	2,037	3,940	294
2021-22	329,575	20,830	61,389	241,471	2,049	3,595	241

Broward County Public Schools

Year	Total Enrollment	White	Black	Hispanic	2 or More Races	Asian	Other
2017-18	271,956	55,726	105,896	92,089	7,247	9,816	440
2021-22	256,037	45,617	99,018	94,389	6,715	9,347	407

Monroe County Public Schools

Year	Total Enrollment	White	Black	Hispanic	2 or More Races	Asian	Other
2017-18	8,500	3,874	902	3,307	270	132	0
2021-22	8,851	3,857	1,025	3,528	328	94	11

Source: FL DOE <https://edudata.fldoe.org/AdvancedReports.html>

The Florida Department of Education Race/Ethnicity Definitions relevant to the K-12 Enrollment Data Chart

- **Black or African American** – A person having origins in any of the black racial groups in Africa.
- **Hispanic or Latino** – A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race. All students who indicated they are Hispanic or Latino are included only in the Hispanic counts; they are not included in the other racial categories they selected.
- **White** – A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

K-12 Public School Funding

The Florida Education Finance Program (FEFP) enacted by the Florida Legislature in 1973 was established to provide each student access to program and services that are substantially equal to any similar student irrespective of geographical differences and local economic factors. The FEFP considers variations in 1) local property tax bases; 2) education program costs; 3) cost of living; and 4) costs for equivalent educational programs due to sparsity and dispersion of the student population.

In 2019 – 20 school districts received 39.15 % of their financial support from state sources, 50.11 % from local sources including the Required Local Effort portion of the FEFP, and 10.73 % from federal sources.²⁴

The FEFP funding formula is quite complex. In the 2022-23 Florida Budget legislators increased per-student funding by \$384.55 to \$8,143²⁵ which is the highest amount per-student funding in Florida’s history. Even so, the Florida Education Association argues that “the budget has not caught up with pre-recession levels when adjusted for inflation.”

According to the Education Data Initiative’s U.S. Public Education Spending Statistics last updated June 15, 2022, Florida receives the third-largest amount of federal K-12 education funding at \$1,243 per public school student (FTE). Florida ranks 42nd in spending and 43rd in funding among the states.²⁶ While funding is not the only factor, or even the most important component of student educational performance, it is certainly a critical component particularly when considering the need to hire, train, and keep the highest quality teachers.

STATE, LOCAL, AND FEDERAL FUNDS PER PUPIL				
SCHOOL DISTRICT	2017-2018	2018-2019	2019-2020	2020-2021
Broward	\$ 8,287.00	\$ 8,439.00	\$ 8,786.00	\$ 9,395.00
Miami	\$ 8,607.00	\$ 8,908.00	\$ 9,709.00	\$ 10,498.00
Monroe	\$ 12,189.00	\$ 12,811.00	\$ 12,702.00	\$ 14,019.00
State Avg	\$ 8,249.00	\$ 8,560.00	\$ 8,859.00	\$ 9,457.00

Source: *Every Student Succeeds Act (ESSA) Per-pupil Expenditures (fldoe.org)*

PK-12 Educational Quality

Numerous organizations assess and rank the nation’s public K-12 school systems by the “quality” of their elementary, middle, and high schools. Florida’s ranking varies widely depending on the organization preparing the ranking. These organizations include, but are not limited to, Education Week, Forbes, National Association of Educational Progress (NAEP), Wallethub, American Legislative Exchange Council (ALEC), and Scholaroo among others.

Education Week is an independent news organization and 501(c) 3 that has covered K-12 since 1981. Self-described as the “#1 source of non-partisan, high-quality news, and insights covering the K-12 education sector, Education Week’s [Quality Counts 2021: Educational Opportunities and Performance in Florida](#),²⁷ the organization referenced by the Florida Department of Education, reports that Florida finished 23rd among the 50 states and District of Columbia with an overall score of 75.6 out of 100 points and a grade of C in 2021; the same average score of the nation as a whole. The states are graded and ranked in three categories: Chance for Success, School Finance, and K-12 Achievement. These scores are averaged and reflected on the report card.

Education has been identified by the Florida Chamber Foundation as the critical foundation toward meeting the goal of having the #1 workforce and talent pipeline in America. The Pew Charitable Trusts in its Economic Mobility Project series and report [Pathways to Economic](#)

[Mobility: Key Indicators](#) highlights education as the largest known factor in explaining the connection between parents' earnings and their children's.

All skills begin with developing proficiency in reading and mathematics at an early age to create the foundation for future learning and workforce success. A key measure of future success in school is Third Grade Reading Performance. A long-term study by the Annie E. Casey Foundation [Early Warning! Why Reading by the End of Third Grade Matters](#) states that reading proficiently by the end of third grade can be a make-or-break benchmark in a child's educational development because up until the third grade, most children are learning to read. After third grade, they are reading to learn, and applying this skill to gain information, think critically, solve problems, and act upon the information they are gaining. They continue that "low achievement in reading has long-term consequences in terms of individual earning potential, global competitiveness, and general productivity." Child studies show that low literacy achievement is associated with behavioral and social problems, and higher high school drop-out rates. Recognizing the importance of reading literacy at this early age, the Florida Chamber Foundation has highlighted in their [Florida Workforce Needs Study](#) that "100% of Florida 3rd graders reading at or above grade level" is a critical aspirational goal and component of developing Florida's future workforce and economy.

SFRPC staff reviewed Florida Statewide Assessment Reports²⁸ and 3rd grade reading scores provided by the Florida Department of Education by school and county. Key to understanding what the test scores mean is understanding the Performance Levels used by the Florida Department of Education. The Florida Department of Education tracks school districts as well as individual schools based by percentages of students in each category.



1. Inadequate – Highly likely to need substantial support for the next grade/course
2. Below Satisfactory – Likely to need substantial support for the next grade/course
3. Satisfactory – May need additional support for the next grade / course
4. Proficient – Likely to excel in the next grade / course
5. Mastery – Highly likely to excel in the next grade / course

It should be noted that the English Language Arts – Third Grade Reading Scores were improving in Miami-Dade, Broward, and Monroe counties up until 2019 immediately prior to the pandemic. No data is available for 2020 and as might be expected, reading score passage rates showed a decline in 2022 due to the closure of schools during the pandemic.

District Number	District Name	English Language Arts – Third Grade Reading Scores Percentage Achievement Level 3 or Above Satisfactory or Above													
		2015	GAP	2016	GAP	2017	GAP	2018	GAP	2019	GAP	2021	GAP	2022	GAP
00	STATE	53%	47%	54%	46%	58%	42%	57%	43%	58%	42%	54%	46%	53%	47%
06	BROWARD	52%	48%	55%	45%	57%	43%	59%	41%	60%	40%	53%	47%	54%	46%
13	MIAMI-DADE	53%	47%	54%	46%	58%	42%	61%	39%	60%	40%	57%	43%	56%	44%
44	MONROE	63%	37%	60%	40%	68%	32%	62%	38%	70%	30%	58%	42%	52%	48%

Source: Florida Department of Education, English Language Arts Grade 3, District 2015 to 2022 Comparison, FSA ELA Grade 3 (Excel)

The shortfall in reading proficiency is particularly pronounced in low-income children. In comparing the individual school 3rd Grade Reading Assessment scores in 2017 and 2022 by county, the data documents that schools with 50%, 60%, 70% + failure rates (= Categories 1 + 2) are more often in high poverty areas. These assessments can be accessed by year, test topic, school district, and individual schools at 2022 (fldoe.org).

Interactive Maps from the Florida Chamber Foundation provide a visual picture of K-12 elementary school reading proficiency and poverty rate of children. The Third Grade Reading Score is the percentage of students who achieved Level 3 or Above in the 3rd Grade Reading Florida Standards Assessment alongside the child poverty rate of the school's zip code. Greater detail can be seen by visiting The Florida GAP Map at <https://www.flchamber.com/floridagapmap/>.

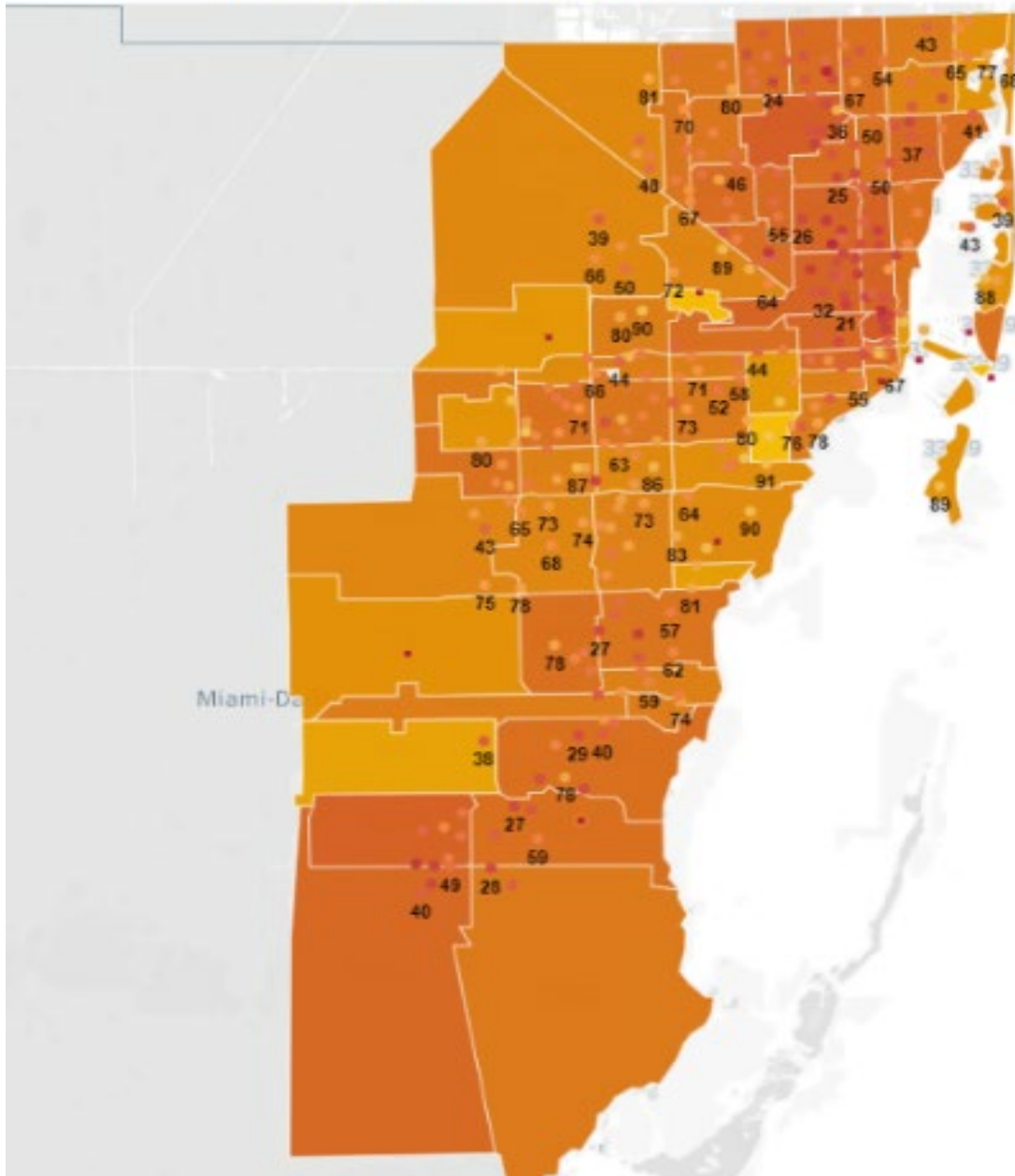
Data from the Florida Department of Education showed Broward County Public Schools earned a “B” rating in 2022, which is indicative of its historical performance. Miami-Dade County Public Schools earned an “A” rating in 2022, which it has maintained since 2018. Monroe County Public Schools slipped from an “A” rating in 2019 to a “B” rating in 2022 (data for 2020 and 2021 are not available due to COVID-19). Graduation rates for 2020 – 2021 for the school districts remained relatively high and are as follows: Broward: 89%; Miami-Dade: 90%; and Monroe: 91%.

The School Grading Model is complex and varies from elementary to middle to high school measuring not only achievement but learning gains, graduation rates, and acceleration success. With the passage of CS/SB 1048 (Chapter 2022-16) and SB 2524 (Chapter 2022-154), the Florida Legislature, amongst other measures, substantially modified Florida's statewide standardized assessment program and school grading system. The updated school grading system will begin no earlier than in the 2023-2024 school year. Over time an “A” will require 90% or more of the points (currently 62% or greater); a “B” will require

80% to 89% of the points (currently 54% - 61%); a “C” will require 70% to 79% of the points (currently 41% - 53%); and a “D” will require 60 to 69 percent of the points (currently 32% - 40%).

Research show that school achievement and education is a main driver of economic prosperity. CEOs of the region’s Economic Development Organizations report that the quality of the region’s public schools and achievement rates is an issue raised by CEOs considering business and headquarters relocation to South Florida.

Elementary School Reading Proficiency and Poverty Rate of Children



Filter by County

Miami-Dade County

Filter by Age

Under-18

Map Legends:

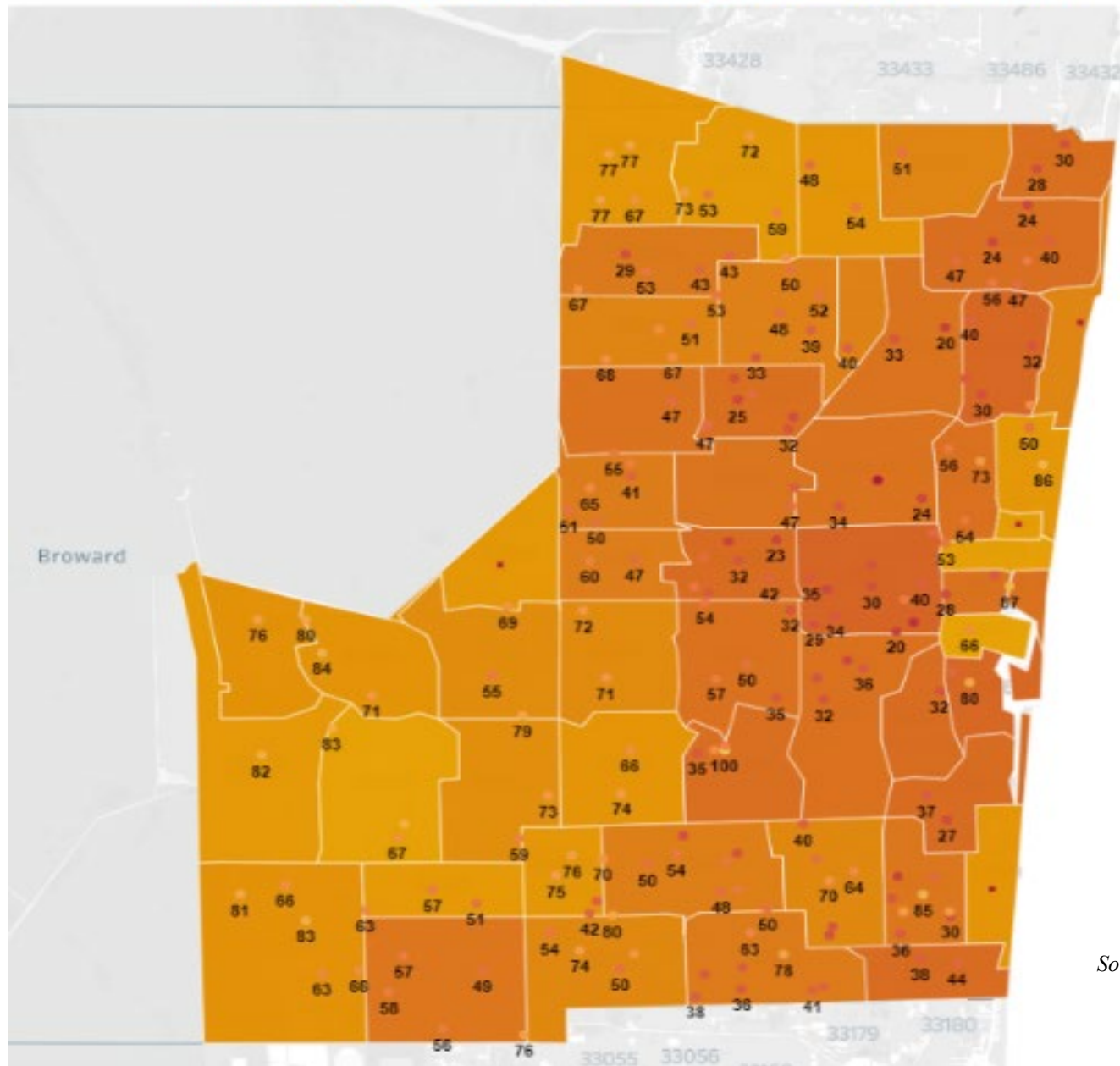
3rd Grade Reading Score
0 100

Poverty Rate
0.0 100.0

Source: <https://www.flchamber.com/floridagapmap/>

Dashboard powered by the

Elementary School Reading Proficiency and Poverty Rate of Children



Filter by County

Broward County

Filter by Age

Under-18

Map Legends:

3rd Grade Reading Score

0 100

Poverty Rate

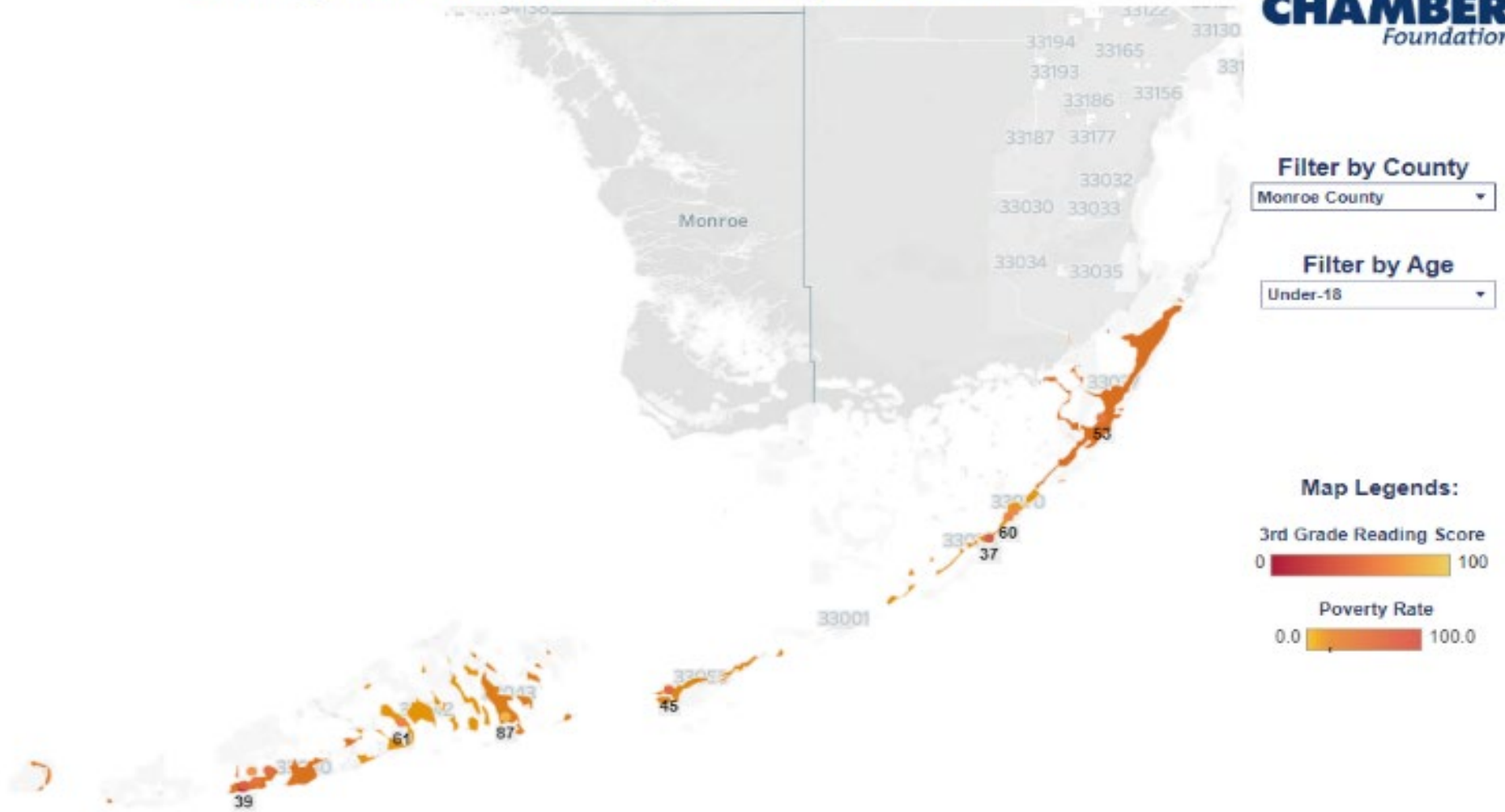
0.0 100.0

Source: <https://www.flchamber.com/floridagapmap/>

Dashboard powered by the



Elementary School Reading Proficiency and Poverty Rate of Children



Source: <https://www.flchamber.com/floridagapmap/>

Dashboard powered by the

Access to Broadband Internet

Access to a computer and broadband Internet, are key necessities and tools for living, learning, and working in 2022. This is a comparison of households with access to Broadband Internet and Households with a computer.

Households With Access to Broadband Internet Percent of Households, 2016 – 2020		Households with a Computer Percent of Households, 2016-2020
County	Percent (%)	Percent (%)
Florida	85.4	93.1
United States	85.2	91.9
Broward	86.5	94.3
Miami-Dade	80.0	92.4
Monroe	85.7	94.2
Other Large Counties		
Hillsborough	89.6	95.0
Orange	89.6	95.7
Palm Beach	86.9	93.7
Pinellas	85.1	92.1

Source: U.S. Census Quick Facts; U.S. Census Bureau QuickFacts: United States

Postsecondary & Higher Education

Trade, Career, Technical, and Vocational Schools

There are many options for quality Postsecondary Education in South Florida. In addition to boasting top quality public and private colleges and universities, South Florida is increasingly leading the way in providing training pathways in Trade, Career, Technical, and Vocational Schools.

As many baby boomers enter retirement, well paying, essential skilled trade jobs need to be filled. With training courses averaging from six months to two years, these schools provide direct and less expensive career pathways for students in careers that are in-demand, well paying, and quickly accessible in the labor market. If South Florida fails to fill these upper middle-class jobs as the current workforce ages out,

the economy of South Florida and residents will suffer a substantial adverse impact.

Good jobs for workers without bachelor's degrees are increasingly concentrated in skilled services. These high demand jobs include, but are not limited to, electronic technicians, aircraft technicians, the construction trades (HVAC technicians, elevator mechanics, plumbers, pipefitter, electricians, inspectors, welders etc.), medical technicians, automotive mechanics, landscape designers, and web developers to name a few.



Courtesy of the Broward Technical Colleges: The Broward Technical Colleges: Atlantic, McFatter, & Sheridan Colleges have awarded more industry certifications than any other educational institution in the state for the past six years in a row. They train for more than 65 different careers preparing students to enter and remain competitive in the global workforce.

South Florida's education and workforce development partners are working to elevate Trade, Career, Technical, and Vocational Schools as a promising path for high school students who can't, or do not want to, pursue a traditional college or university degree immediately following high school. The Public School System, colleges, and workforce development organizations are leading the way along with county and state government, unions, the Associated Builders and Contractors, career technical education /vocational schools operated by the region's School Boards, and non-profit partners. Through this training, students learn not only technical skills but also the "soft skills" needed to be successful in the workplace.

The U.S. Department of Commerce EDA recently announced a \$1.8 million grant to Miami-Dade College to support creation of a new Construction Trade Institute where they expect to train 120 students per year. The College of the Florida Keys has a new Construction Apprenticeships in a Construction Technologies Program that offers new opportunities to help individuals train and advance in high wage, high demand construction careers in the Florida Keys. This program is offered tuition free with paid employment - including raises - while taking classes. Students are employed and paid full time by a sponsoring employer that is partnered with the College of the Florida Keys.

Broward College's Broward UP provides courses and workshops to upskill and retool students for the workforce by providing both the technical and soft skills needed for college and career readiness. Course offerings span multiple career pathways and impart valuable skills that can be applied to numerous work settings. Certifications can be earned in as little as one day or up to several months online from a student's neighborhood. Through grant funding, Broward UP offers free courses and workshops to qualify students who reside in targeted low-income communities and those referred by community partners. The Broward County Board of County Commissioners approved a Construction

Apprenticeship Program that requires vendors (contractors) bidding on County construction projects to participate in an apprenticeship program registered with the Florida Department of Education or the United States Department of Labor.

Higher Education

South Florida's public and private colleges, universities, and specialty centers such as the Alan B. Levan | NSU Broward Center of Innovation, FIU Sea Level Solutions Center, and FAU Center for Environmental Solutions are leading the way in higher education. These colleges and universities, many of them award winning institutions, offer students educational opportunities in every field of study.

Ocean Research is an important and growing field of expertise in the region. Although many people think of Wood's Hole Massachusetts or San Diego as leading the nation in University Based marine research, in fact South Florida's four Universities together comprise the largest university-based marine research concentration in the Nation. The four Research Universities have combined to create the South Florida Marine Research Hub. The NOVA Guy Harvey Oceanographic Center, UM's Cooperative Institute for Marine & Atmospheric Studies and Rosenstiel School of Marine and Atmospheric Science, FAU SeaTech, and FIU Institute of Environment are key institutions that have made South Florida a unique leader in ocean and coral reefs research, marine-based medicine, and energy development among other areas.

Research institutions are leading in the development of new patents. In September 2022, Florida International University placed among the top three Florida universities for creating new patented technology with 62 new patents this year alone.

Higher Education Funding

South Florida is home to many fine institutions of higher education including the nation’s largest “community college.” Miami-Dade College, like its senior counterpart Florida International University, are among the colleges and universities that graduate a significant number of Hispanic students. As the percentage of Hispanic and other minority students continue to increase in South Florida, it is important that these and other public institutions received adequate funding to maintain a competitive workforce. According to the State and Local Backgrounders Project²⁹ from the Urban Institute, state governments spend more of their budgets on higher education than local governments.

The Urban Institute notes in its report that the state of Florida had the lowest level of per capita spending (\$563) in the country in 2019. In contrast, the National Center for Science and Engineering Statistics reports that in 2020 the state of Florida ranked 25th nationally in state support for Higher Education per Full Time Equivalent Student (FTE). Based on the FTE metric in two- and four-year public postsecondary institutions, the United States spent \$7,566 per FTE in 2020 compared to \$7,588 per FTE in Florida³⁰. Using this metric, the state of Florida is ranked in the 3rd quartile for state funding and is at the national average in State Support for Higher Education per Full-Time Equivalent Student when values are adjusted for inflation.³¹ Twenty-five states rank below Florida in per FTE funding for higher education.

REGIONAL INSTITUTIONS OF HIGHER EDUCATION

Baccalaureate & Post-Graduate Degrees Institutions

- Barry University
- Everglades University
- Florida Atlantic University
- Florida International University
- Florida Memorial University
- Keiser University
- Miami International University of Art & Design
- Nova Southeastern University
- St. Thomas University
- University of Miami

Medical Schools

- University of Miami Miller School of Medicine
- Florida Atlantic University Charles E. Schmidt College of Medicine
- Florida International University Herbert Wertheim College of Medicine
- Nova Southeastern University Dr. Kiran C. Patel College of Osteopathic Medicine
- Nova Southeastern University Dr. Kiran C. Patel College of Allopathic Medicine

Baccalaureate, Associate, and Vocational Institutions

- Broward College
- Miami Dade College
- The College of the Florida Keys

Trade, Career, Technical, and Vocational Schools

- Broward College
- College of the Florida Keys
- Miami-Dade College
- Miami Lakes Educational Center & Technical College
- Florida Career College
- Florida Education Institute
- Florida Technical College
- FVI School of Nursing & Technology
- Keiser University
- South Florida Institute of Technology
- South Florida Technical Training
- And more ...

ALICE Index

The **ALICE** Index, which stands for Asset Limited, Income Constrained, and Employed provides a different view of financial burden than the official measure of poverty used by the Census Bureau. United Way, the developer of the index, describes ALICE as representing “those who work hard and are above the poverty line, but due to high costs and factors often beyond their control, must live paycheck to paycheck.”

ALICE households are determined by the ALICE Household Survival Budget, a county-specific estimate of the minimal cost of living. It includes housing, food, transportation, health care, childcare, taxes, a modest phone bill, and a small “contingency fund” equal to 10% of the total budget. Incidentals like emergency repairs, Internet and cable, or holiday gifts are not figured into the ALICE Household Survival Budget. Due to skyrocketing housing prices, healthcare, childcare, transportation, food costs, and other essentials, more families are unable to afford their basic needs and have fallen below the ALICE threshold into poverty.

The COVID-19 pandemic exposed exactly the issues of economic fragility and widespread hardship that the United for ALICE and ALICE data reveals. United for ALICE’s most recent 2020 report which uses 2018 data, shows that the cost of living for the ALICE population is growing significantly in both urban and rural areas, often driven by the cost of housing. It should be noted that this data, although best available from United for ALICE, is pre-pandemic data.

South Florida Poverty Rate

14.55%

ALICE Households 37%
Poverty Households 15%
2018 Data

Miami-Dade Poverty Rate

16%

ALICE Households 37%
Poverty Households 17%
2018 Data

Broward County Poverty Rate

12.7%

ALICE Households 37%
Poverty Households 13%
2018 Data

Monroe County Poverty Rate

10.6%

ALICE Households 29%
Poverty Households 8%
2018 Data

ALICE Households with Children and Poverty Levels

A review of data from United for ALICE shows that in 2019, 16% of children in the U.S. lived in poverty while another 33% were ALICE households earning above the poverty level but earning less than what it costs to purchase basic necessities. In 2019, Broward and Miami-Dade counties had a higher percentage of ALICE Households with Children with 41% and 42% respectively. Broward County’s poverty rate of Households with Children in 2019 was equal to that of the United States at 16% while Miami-Dade’s poverty rate was higher at 20%. In this study, Miami-Dade and Monroe counties were combined.³²

Family Structure, Poverty, & the Economic Mobility of Families

The Economic Mobility Project,³³ an Initiative of The Pew Charitable Trusts, Foundation, found in its studies [*Pathways to Economic Mobility: Key Indicators \(2008\)*](#)³⁴ and [*Getting Ahead or Losing Ground: Economic Mobility in America \(2008\)*](#)³⁵ that “the economic position of many children is “... closely tied to the economic mobility of their parents and that African American children have much less upward mobility – and more downward mobility – than white children.” The report continues that “numerous studies have found that family structure matters” with “children growing in stable, married families less likely to drop out of schools, less likely to have children as teenagers, and less likely to be out of school but not working, all of which could lead to greater economic success.” Additionally, “studies have found that “children whose parents divorce have, on average, lower test scores and worse behavioral outcomes.”

The [*ALICE in Focus: Children Florida Research Brief \(April 2022\)*](#),³⁶ provides important data on the importance of family structure on the well-being of children from a financial standpoint.

Children by Household Financial Status and Key Demographics (Florida 2019). Takeaways include:

- Single-Female-Headed households with children are second only to Married, Different Sex Households and vastly outnumber Single-Male-Headed households with children (1,224,787 and 378,862 respectively).
- Of these households 78% or 955,334 of Single-Female Headed households are below the ALICE threshold (36% in Poverty and 42% ALICE) compared to 63% or 239,000 of Single-Male-Headed households (18% in Poverty and 45% ALICE).
- Unmarried couples have worse outcomes than married couples with 26% Poverty and 38% ALICE.

- Married, Different Sex households represent approximately 61% of Florida’s families. They perform better than any other family structure with 54% above the ALICE threshold, 37% ALICE, and 8% Poverty.
- Two Adults, Two Workers households have the best outcomes with 4% Poverty, 32% ALICE, and 64% above the ALICE threshold.
- One Adult, One Worker households have the worst outcome among workers with 31% Poverty, 46% ALICE, and 24% above the ALICE threshold.

Impact of Fatherless Families

In Miami-Dade County the number of single-parent households with children have increased from 35.8% in 2009 to 38.2% in 2020. In Broward County the number of single parent households have increased to 36.52% in 2020 from 34% in 2009, with Monroe County increasing from 29.3 in 2009 to 32.9% in 2020. The highest ALICE and poverty rates in Households with Children are found in Female-headed Single-Parent Households so an increase in these households is a negative trend for South Florida’s families and economy.³⁷

There are numerous resources that discuss the deleterious impacts of growing up in families lacking a father. These effects do not simply impact a child individually in the present and in the future, but also have implications for economic development, economic mobility, poverty rates, and workforce development. Research has found that fathers play a unique role in producing positive outcomes for children.

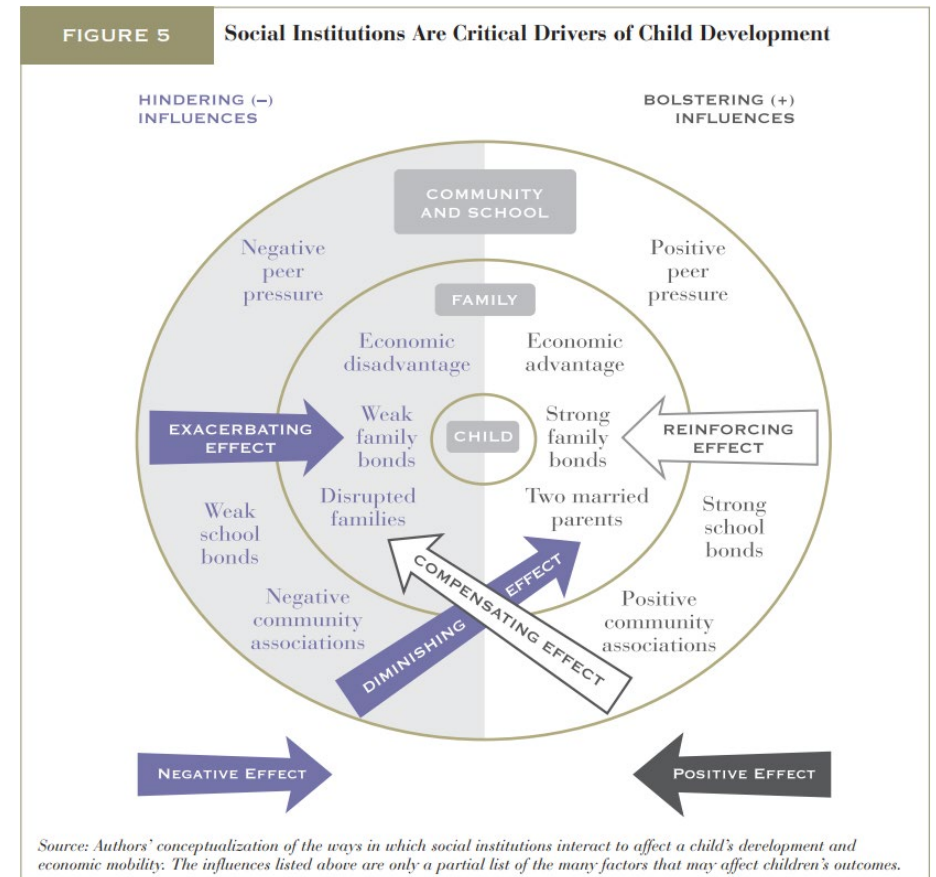
According to the Florida House of Representatives Committee on Children, Families, and Seniors Subcommittee “Although mothers tend to be more nurturing and emotionally supportive than fathers, fathers tend to focus more on preparing children for their lives as adults. There is growing research on the link between father involvement and children’s well-being. Father involvement and positive interactions with their children are important for children’s health, self-esteem, social skills, and educational attainment. Multiple studies have found positive links between father involvement and a child’s graduation from high school, social-emotional adjustment, and mental health into adulthood.”³⁸

Common Effects of Growing up without a Father include:

- More likely to experience poverty and homelessness
- More likely to suffer from drug and alcohol abuse
- More likely to have mental issues low self-esteem, anxiety, and depression
- More likely to do poorly in schools
- More likely to be incarcerated and die by suicide
- More likely to be engaged in sexual activity
- Higher risk of teen pregnancy
- More likely to have issues with perceived abandonment
- More likely to have attachment issues
- More likely to have been victims of child abuse
- More likely to be involved in gangs

Sources: Source: *Fatherless Boys Foundation*
<https://fatherlessboysfoundation.org/>; *fathers.com*;
Minnesota Psychological Association: mnpsych.org

The Minnesota Psychological Association summarizes “Given the large research base suggesting that children who grow up in homes without a father present adverse outcomes at rates significantly above those with fathers present, attention to this phenomenon is perhaps warranted by clinicians, researchers, and policymakers. It is important to point out that not all children who are raised in a father-absent home will experience adverse outcomes. This said, available evidence cannot be ignored.”



Courtesy of the Pew Charitable Trusts; “*Pathways to Economic Mobility: Key Indicators*”

Recognizing the crucial role of a father in a family, Prosperity Broward, an initiative of the Greater Fort Lauderdale Alliance Foundation and Six Pillars Broward, is launching a ground-breaking pilot project in Lauderdale Lakes to increase economic mobility through policy and system changes. The pilot project consists of a co-research process with single mothers, employers, community partners, and elected officials. Through a detailed analysis, the project partners identified that families with children under 18 and no spouse present were the group with the most need in the city. As 80% of head of the families with children under 18 and no spouse present are females, the project partners decided to focus the pilot project on assisting single mothers to maximize the positive impact on the community. At the conclusion of the pilot, systemic changes and new policies will be introduced and adopted, along with the creation of a roadmap that will help and empower other communities to dismantle their barriers to economic mobility.

Equity: Building Pathways to Economic Opportunity & Success

The economies of Broward, Miami-Dade and Monroe counties are robust with exceptionally low unemployment rates, ranging from 1.7% in Monroe County, 2.8% in Broward County, and 3.0% in Miami-Dade County as of March 2022.³⁹ However, measures of income and poverty show another side to the economic story of the tri-county area of South Florida.

Only Monroe County with a Median Household Income (MHI) of \$72,012 had a MHI higher than the national average of \$67,521 in 2020. This compares to a Broward County MHI of \$60,922 and Miami-Dade County MHI of \$53,975. Additionally, 2020 Per Capita Income (PCI) in Miami-Dade County at \$29,598 and Broward County at \$34,063 was below the national PCI of \$35,808. Monroe County's PCI of \$47,382 was higher than Broward's and Miami-Dade's PCI, and the nation as a whole in 2020. The nation's poverty rate in 2018 was 11.8% compared

to Miami-Dade County at 16%, Broward County at 13%, and Monroe County at 8%. By 2020, the poverty rate had dropped slightly to 11% in Broward County, 15% in Miami-Dade, and increased in Monroe County to 10.2%.⁴⁰ This compares to a 2020 poverty rate of 13.3% in Florida and 11.4% in the nation as a whole according to U.S. Census Bureau Quick Facts.

Not all communities in South Florida are benefiting from the region's economic activity and participating in its benefits. To ensure that all communities can participate in the benefits of South Florida's economy and workforce it is necessary to identify and remove barriers to participation in the economy by improving the access of communities, especially low-income communities, to enhanced opportunities to education, workforce training, well-paying jobs and careers, essential services, affordable housing, transportation options, childcare, etc.



Courtesy of the Florida Chamber Foundation

Nationally, economic inequality, whether measured through gaps in income or wealth between richer and poorer households, continues to widen.⁴¹ A 2020 Pew Research Center [report](#)⁴² examining trends in income and wealth inequality found that although household incomes were growing again after a lengthy stagnation, the gaps in income between upper-income and middle- and lower-income households are rising, and the share of wealth held by middle-income households is falling.

A 2019 Study [Toward a More Inclusive Region: Inequality and Poverty in Greater Miami](#) of the Miami Urban Future Initiative at Florida International University found that despite the region's booming economy and tremendous wealth, there is a high level of economic inequality in the region. This high level of economic inequality in the South Florida is due in part to the shrinking middle class and prevalence of low-paying service jobs.

The Pew Research Center defines "middle-income" adults i.e. "middle class" in 2021 as those "... with an annual household income that was two-thirds to double the national median income in 2020, after incomes have been adjusted for household size, or about \$52,000 to \$156,000 annually in 2020 dollars for a household of three. 'Lower-income' adults have household incomes less than \$52,000 and "upper-income" adults have household incomes greater than \$156,000."⁴³ They continue, "But being middle class can refer to more than just income, be it the level of education, the type of profession, economic security, home ownership ...".

In the Miami Urban Future Initiative report, the authors defined "middle class" as households earning between two-thirds and double the national median income between 2015 and 2017. According to the authors, in 2017 Greater Miami had the ninth-highest rate of poverty amongst 53 large metros, behind only New York. They found that the middle class had shrunk from 65% in 1970 to just over 40% in 2017. The

region also has the highest elder poverty rate among large metros, deeply concentrated poverty which is most pronounced in South Florida's black and Hispanic populations; and a youth poverty rate (children under the age of 18) of 19.3% which is higher than the overall youth poverty rate of 17.5 in 2017.^{44 45}

[Common equity indicators](#) include Economic Opportunity, Education, Housing, Public Safety, Governance, and Public Health. The Florida Department of Health releases annual County Health Rankings for health outcomes and health factors prepared by the [University of Wisconsin Population Health Institute](#)⁴⁶. The data tool the University has created allows researchers to compare data by county in the United States.

The County Health Rankings includes data on education, jobs, incomes, and the environment which impacts how healthy people are and how long they live. While all the counties in South Florida fared better in 2022 for health outcomes (length and quality of life), when compared with 2017, rankings on health factors (health behaviors, access to and quality clinical care, social and economic factors, and physical environment) fell in all three counties. The percentage of the population with health insurance was decreasing through 2020 but appears to have increased in 2022. In 2022, the insurance data is collected as a percentage of adults and children. It is curious that while the ranking in health outcomes score rose in 2022, the ranking in health factors score decreased. The 2020 Rankings include data predating the COVID-19 pandemic.

The concept of "Equity" recognizes that communities in economic distress need greater investment to help individuals close the gap between their current state and key measures of success such as income, health, housing, education, economic opportunity, self-sufficiency, and independence. Investing in education is an effective strategy to reduce income disparity. Targeted programs such as

Broward UP model led by Broward College is one example of a “best practice” illustrating how to meaningfully assist low-income community residents with personalized care by providing access to workforce training, job opportunities, and supportive services.

County	Population Without Health Insurance %		
	2017	2020	2022
Florida	20%	16%	Adults 19% Children 8%
Broward	21%	17%	Adults 21% Children 9%
Miami-Dade	26%	20%	Adults 23% Children 7%
Monroe	22%	20%	Adults 24% Children 14%

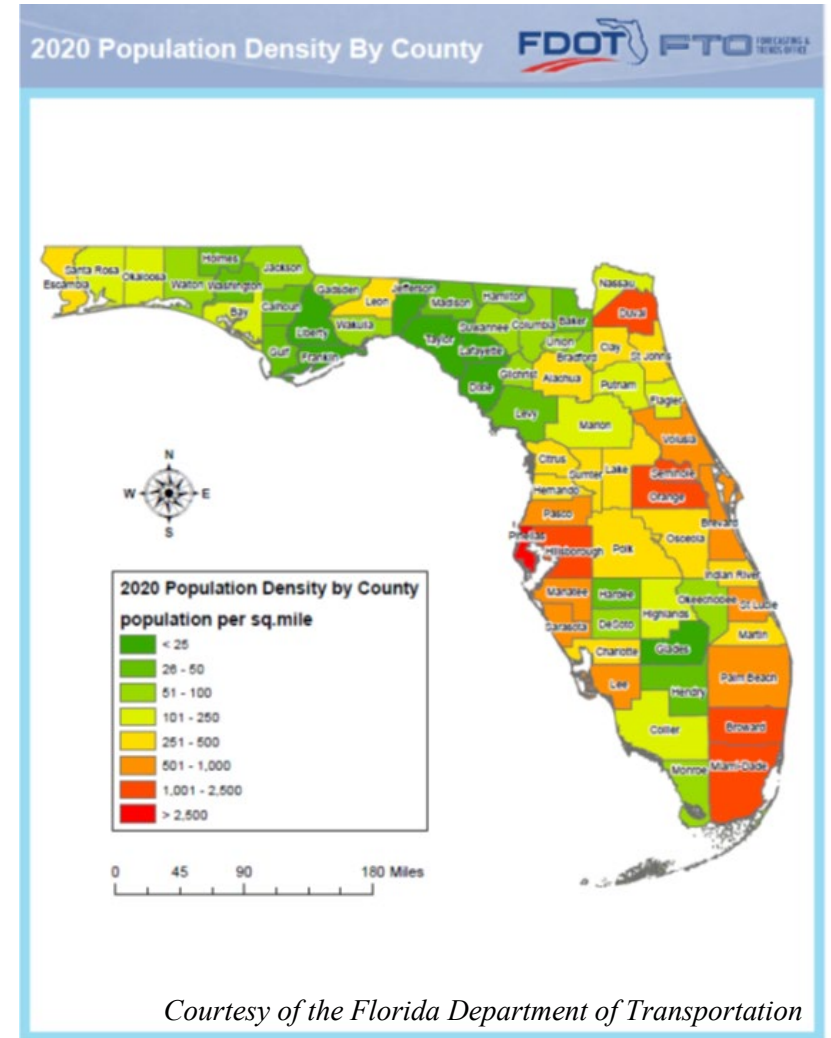
County	Ranking in Health Outcomes			Ranking in Health Factors		
	2017	2020	2022	2017	2020	2022
Florida	n/a	n/a	n/a	n/a	n/a	n/a
Broward	19	11	10	14	12	30
Miami-Dade	23	6	6	28	32	37
Monroe	10	8	4	6	8	20

Source: County Health Rankings, www.countyhealthrankings.org
2017, 2020, 2022 Data

Development & Density

Scarcity of developable land in South Florida creates problems, especially within the context of projected population increases. While

urban infill and redevelopment are viable strategies for accommodating population growth and encouraging economic development, South Florida is already one of the densest regions in the state, bordered by the Atlantic Ocean to the east and the Everglades and wetlands in Miami-Dade and Broward counties, and the Gulf of Mexico to the west in Monroe County. In other areas of the country, development and additional housing can be accommodated by additional urban sprawl from the City Center.



While urban sprawl contributes to other challenges, it can help keep the price of housing more affordable because of lower land costs. As a highly urbanized and developed region bounded by the Atlantic Ocean on the east and Everglades on the west, the inability to sprawl is one of the biggest factors in rising housing prices. This limitation is especially pronounced in Monroe County which is a state-designated area of “Critical State Concern” where new development is greatly limited because of potential impacts to resources of major statewide significance.

Energy

According to the U.S. Energy Information Administration, Florida is the nation’s second largest producer of electricity after Texas.⁴⁷ The state’s electric energy is sourced from a diverse mixture such as coal, natural gas, nuclear, renewables and other sources. Florida’s renewable energy generation continues to expand. According to the U.S. Department of Energy’s, Energy Information Administration, Florida is the fourth in the nation of solar power generating capacity.⁴⁸

South Florida is a key contributor to Florida’s energy security contributing natural gas, nuclear power, solar power generation, and petroleum imports and distribution. South Florida has a high number of natural gas local distribution companies. The region hosts the Turkey Point Nuclear Generating Station in South Miami-Dade County which generates about 1,600 million watts of electricity which supplies the annual energy needs of more than 900,000 homes.⁴⁹

Port Everglades in Broward County serves 100% of the petroleum product needs of Miami-Dade, Broward, Palm Beach, and Martin counties with a distribution area that incorporates eight additional counties.⁵⁰ Florida Power & Light is currently exploring the creation of a Solar Energy Center Photovoltaic 74.5 MW power plant in south

Miami-Dade County which would feature more than 200,000 photovoltaic solar panels.

Environment

South Florida Region’s climate is considered tropical, with wet savanna, monsoon, or rainforest sub-climates. All three sub-classifications are characterized by average monthly mean temperatures above 64°F. Within the two most prominent climates in the Region, tropical savanna and tropical monsoon, a distinct wet season typically occurs in late summer, and a dry season occurs in late winter to early spring. South Florida experiences a tropical climate year-round. The region’s tropical climate is without question a great economic development asset. Even so substantial rainfall contributes to drainage and flooding problems which are expected to worsen over time.

As a direct result of South Florida’s warm climate, coastal location, uniquely diverse ecosystems, and cultural heritage sites, and abundance of national, state, and county parks in the region, environmental tourism thrives. Ecotourism, distinguished from environmental tourism as low impact, education-based, and conservation conscientious, continues to gain traction. A shift from high-impact tourism to ecotourism signifies a growing regional interest in both environmental and economic sustainability.

Parks

The region is blessed with several national parks including Everglades National Park, Biscayne National Park, and Dry Tortugas National Park which is accessible from Key West. Among “South Florida” national parks is Big Cypress National Preserve in Collier County. Everglades National Park is a World Heritage Site, International Biosphere Reserve, a Wetland of International Importance, and a

specially protected area under the Cartagena Treaty. A 2019 National Park Service reported more than 1.9 million visitors, collectively spending \$156 million, resulting in 2,089 jobs with a cumulative benefit to South Florida's economy of \$225.4 million. The region's local governments have invested heavily in their respective county and municipal park systems. In addition to state and municipal parks, Miami-Dade County boasts more than 280 parks, with 55 in Broward County, and 23 in Monroe County. In South Florida, the environment is our economy.

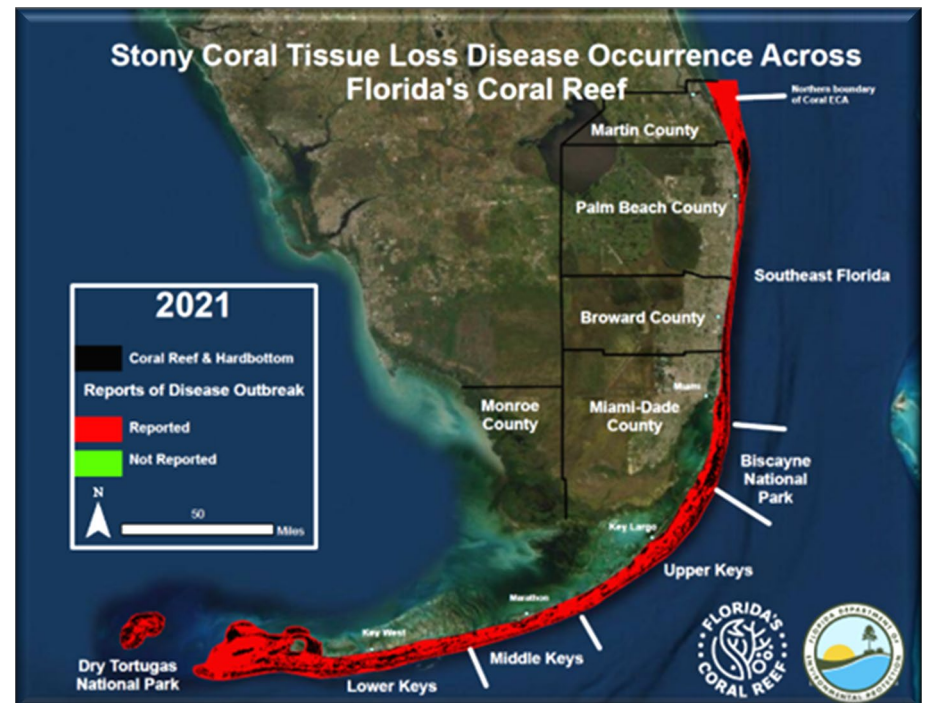
Florida's Coral Reef

Over the past five years, the South Florida and Treasure Coast Regional Planning Councils have worked in close partnership with local, state, and federal agencies, as well as academic, nonprofit, and private leaders to further awareness, restoration, and protection of Florida's endangered coral reef. The seven-county Southeast Florida region, with 122 municipalities and more than 6.8 million residents, is home to Florida's Coral Reef - the only living barrier coral reef system in the continental United States.

Established in 2018, The "Kristin Jacobs Southeast Florida Coral Reef Conservation Area" encompasses sovereign submerged lands and state waters offshore of Martin, Palm Beach, Broward, and Miami-Dade counties from the St. Lucie Inlet in the north to the northern boundary of Biscayne National Park in the south was established by the Florida Legislature after the multi-year, untiring efforts of State Representative Kristin Jacobs of Broward County and regional stakeholders. The SFRPC, TCRPC, and state and regional stakeholders continue to work toward passage of the "Restoring Resilient Reefs Act" by Congress as key legislation needed to secure funding and support the restoration and conservation of the nation's coral reefs.

Florida's Coral Reef is experiencing a multi-year outbreak of stony coral tissue loss disease. This disease is a new lethal disease first reported in Florida in 2014. While the exact cause of the disease is unknown, recent evidence points to a viral pathogen⁵¹ with contributing, perhaps secondary, bacterial infections. Experts believe that the disease can be transmitted by touch, water circulation, and sediment transport⁵² and may be related, in part, poor water quality from urban pollution including stormwater and wastewater runoff.⁵³

This event is unique due to its large geographic range, extended duration, rapid progression, and high rates of mortality including reef-building coral species listed under the Endangered Species Act. First reported off the coast of Miami-Dade County in 2014, this outbreak has spread along Florida's Coral Reef and to reefs throughout the Caribbean, including the U.S. Virgin Islands, Puerto Rico, and 18 other countries and territories.



Courtesy of the Florida Department of Environmental Protection

This highly contagious and lethal disease has affected more than 30 species of corals especially 20 or more of Florida’s approximately 45 species of reef-building corals including five species listed pursuant to the Endangered Species Act.⁵⁴ Once an infected coral begins to lose living tissue, colonies will die within weeks or months absent active intervention.

Healthy reefs are critically important ecologically and consequently economically for many reasons, including the following:

Habitat for myriad organisms (including fish): biodiversity repository and enhancement

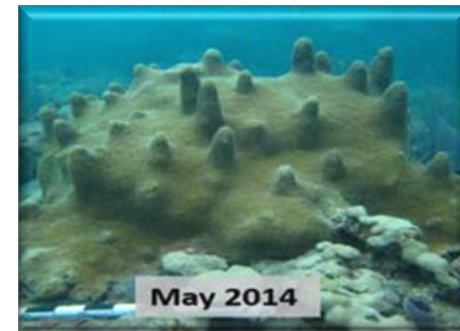
- Source of food and new medicines
- Home to many ecologically and economically important species like spiny lobsters, snappers, and groupers⁵⁵

Jobs for local communities, local, regional, and national economic impact

- Sport and commercial fishing
- Tourism and diving - reef- related diving and snorkeling supports thousands of jobs in Florida, Puerto Rico and the USVI
- The [2020 Marine Industry Economic Impact Numbers - MIASEF](#) show that Florida’s marine industry [remains] ... an essential and growing component of the state’s overall economy
- Extractive recreation (sport fishing) [\$37.8 million in total Saltwater license sales FY 19/20; \$9.2 Billion in saltwater recreational fishing; 120,000 jobs]
- Commercial fishing (\$1 million in licenses; \$197 million in commercial food fish sales dockside; Florida’s commercial fisheries generate \$3.2 billion in income & 76,700 jobs)
- Tourism and diving - reef- related diving and snorkeling support 8,668 jobs and generate about \$902 million in total economic output over the course of a year in Florida

Coastal Resilience & Flood Protection

- Healthy and resilient coral reefs safeguard against extreme weather, shoreline erosion and coastal flooding. Florida’s Coral Reef provides more than \$355 million per year in flood protection benefits and protects nearly \$320 million in annual economic activity. (Storlazzi et al.⁵⁶)
- Coral reefs are one of the most ecologically diverse and productive biomes in the world – they are also one of the most threatened.



Since 2017, the SFRPC has partnered with the Florida Department of Environmental Protection (DEP) to garner support from the region's Economic Development Organizations, private foundations, research universities, and business leaders for the development of a comprehensive economic development strategic plan focused on South Florida's Coral Reef propagation and restoration, technology, including expansion of the South Florida "Blue Economy." The project's purpose is to capitalize on increasing demand for coral restoration in South Florida and other reef communities. This project would fuel innovation and entrepreneurship in coral propagation and restoration technology, create opportunities for job creation in both tech and environmental restoration, increase investment and employment opportunities, and advance a high priority environmental and economic development initiative. This is a continuing priority of the State, and the South Florida and Treasure Coast Regional Planning Councils.

The development of a comprehensive strategic plan for South Florida coral propagation and restoration will identify opportunities for infrastructure and workforce development, focusing on job creation and retention, investment opportunities, and long-term funding streams to keep coral propagation viable into the future. The strategic plan will help project partners:

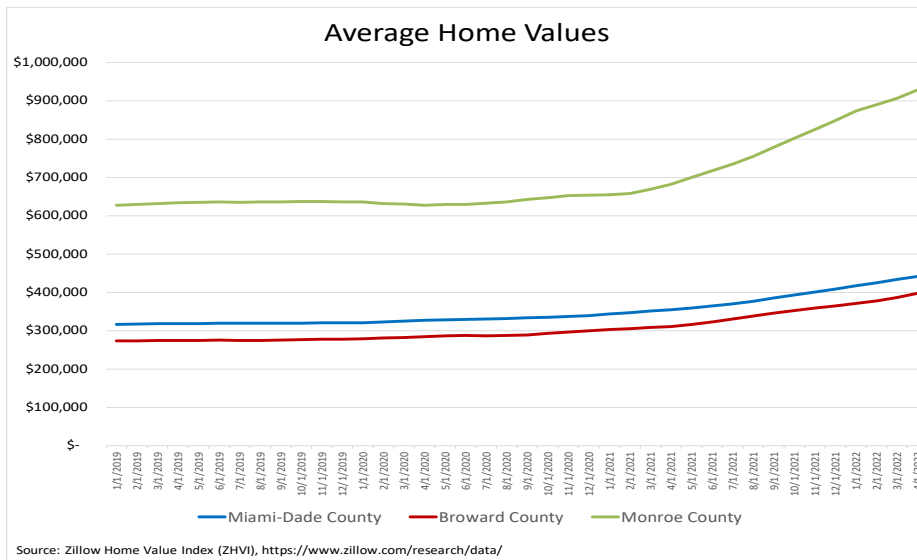
- Develop new or expand existing coral propagation infrastructure
- Create education pathways, workforce training, and employment opportunities accessible by low-income residents
- Develop employment streams for talent acquisition and retention of expert aquarists
- Identify and/or establish novel funding streams and revenue sources
- Develop a strong network of research, business, and technology partners to advance coral propagation and restoration
- Support local eco-tourism and marine-based businesses



Housing

Affordable housing, defined by U.S. HUD as housing on which the occupant is paying no more than 30% of gross income, has far reaching impacts on economic growth, opportunity, educational performance and attainment, health, social mobility, and equity. Typically, housing costs are the largest component of total household expenses for most American families and households. The second largest spending costs for the typical U.S. family is transportation.

In 2022, South Florida counties and municipalities face an elevated affordable housing crisis. This crisis is carried on the backs of hard-working Florida families who face impossible household budget choices like whether a rent payment should come before purchasing groceries, medical care, or an electric bill.



Most policymakers, employers, and residents in southeast Florida are familiar with the mounting pressure for affordable and workforce housing in their communities. In addition to the limited amount of land available for development in this region bordered by the Atlantic Ocean to the east and the Everglades and wetlands in Miami-Dade and Broward counties, and the Gulf of Mexico to the west in Monroe County, the region is significantly impacted by the limited supply of affordable housing and rising demand.

Contributing market factors include investors buying single family homes for conversion to rentals, the conversion of affordable housing to vacation rentals, that the region is a popular destination for second homes, and increased demand from international and other immigration to South Florida. Aging housing stock, low rental vacancy rates, low affordable housing production, and low wages in the predominant industry sectors Leisure & Hospitality, retail trade, and health services impact housing availability and push housing costs up for both renters and owners.

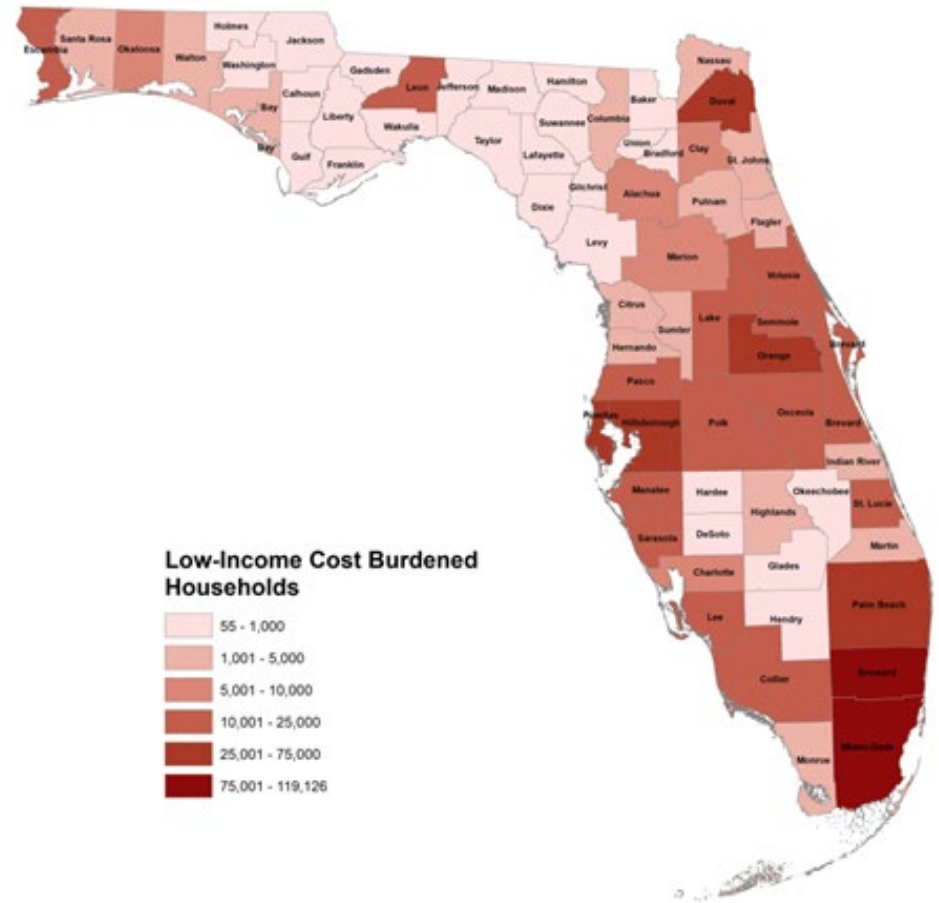
Due to limited availability, the high cost of land in the region makes it prohibitive to build affordable housing without significant government assistance in funding and higher density which is often opposed by local governments and residents. Miami-Dade and Broward counties are increasingly focused on the development of incentives for increased Transit Oriented Development (TOD) to develop additional affordable housing and reduce high combined housing and transportation expenses burdening residents.

South Florida is known for its volatile housing market. In 2008 housing prices were at an unseen peak before a major crash. Over the course of a decade they rebounded, and today they are at all-time highs, although recent interest hikes may foretell the decline of home prices without making homes more affordable. Both rents and home ownership costs have skyrocketed.

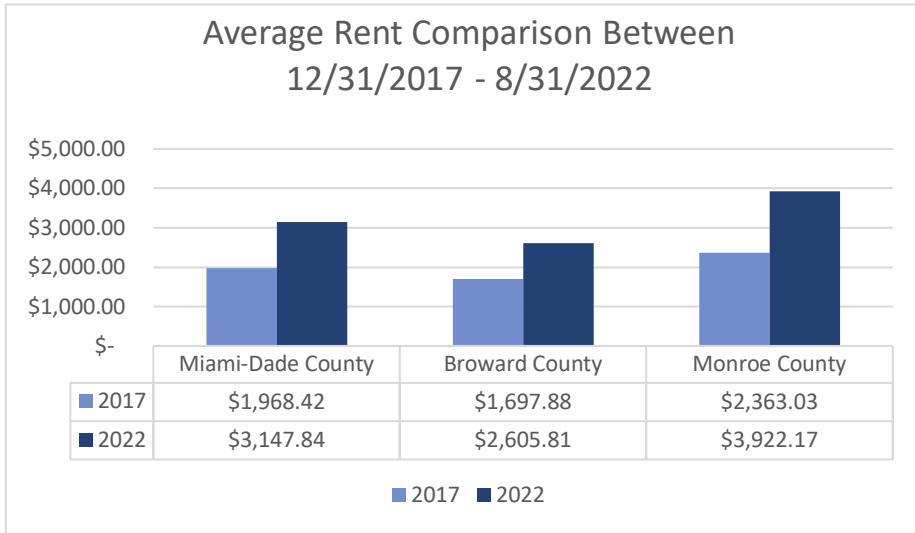
A household is classified as “low-income” if its income is at or below 60 percent of the area median income (AMI), adjusted for household size. A household is “cost burdened” if it pays more than 40% of income for gross rent, including utility costs. According to the University of Florida’s Shimberg Center for Housing Studies’ June 2022 Rental Market Study, just under 60% of low-income, cost burdened renter households are in large counties such as Broward and Miami-Dade. Miami-Dade County has the largest share of the state’s low-income, cost burdened renters, at 16%. Monroe County, a small sized county, has the largest share of cost burdened households in the state, with 3,913 households or 27% of all renters in the county.

Realtor.com reports that in September 2022, the median listing home price in Monroe County was \$1.2 million with a median home sold price of \$780K. This compares with a median listing price of \$450K and median sold home price of \$387.5K in Broward, and median listing price of \$565K and median sold home price of \$473.3K in Miami-Dade County. They also report that in March 2022, the overall median rent in the Miami-Fort Lauderdale-Pompano Beach MSA was \$2,988⁵⁷; a 57.2% increase from March 2021 and the largest percentage increase among the nation’s 50 largest metropolitan areas⁵⁸.

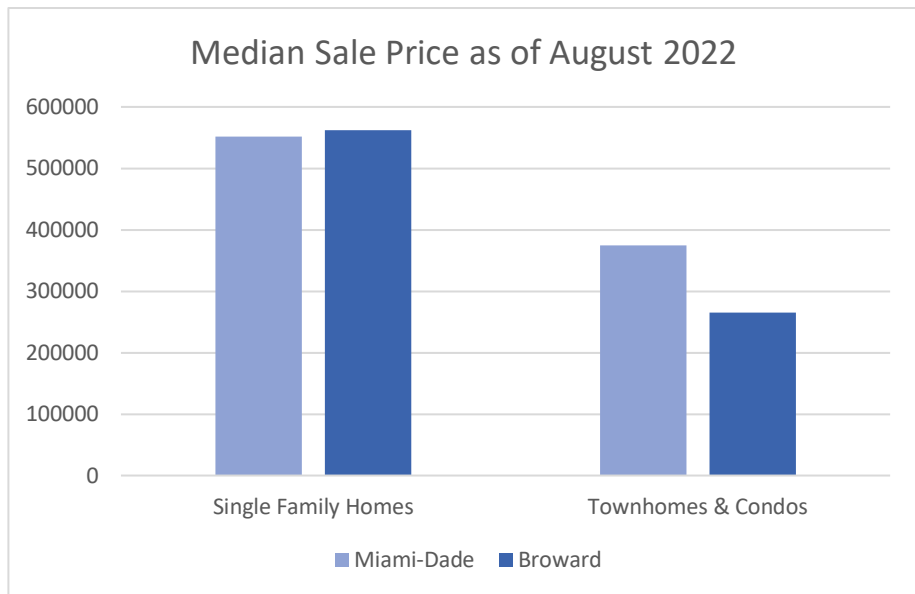
Most cost burdened renters in the South Florida region have incomes below 60% of Average Median Income (AMI), but some renters with higher incomes also experience cost burden. Cost burden among renters above 60% of AMI is geographically concentrated in high-cost counties, mostly in southeast Florida and the Orlando area. Sixty-three percent (63%) of renters under this income level are cost burdened in Miami-Dade and Monroe, and 40% in Broward County.⁵⁹ While South Florida does not have the highest housing costs in the nation, it is among the most unaffordable because of high land costs, high cost of living, and relatively low wages.



Courtesy of the Shimberg Center for Housing Studies, June 2022



Source: <https://www.zillow.com/research/data/>



Source: MIAMI Association of Realtors South Florida

While the housing numbers change daily, Zillow shows that the average rents for the tri-county area as of August 31, 2022 have drastically increased since 2017. Miami-Dade County has seen an

average rent increase of 60%, Broward 53%, and Monroe 89%. Home sale prices have skyrocketed as well. According to the latest Miami Association of Realtors South Florida Market Stats, the August 2022 Median Sale Price for a single-family home in Broward County was \$562,500 and in Miami-Dade \$551,250. Zillow data reported a median sale price of \$1,034,537 for Monroe County.

Mounting insurance costs are a contributing factor the rising costs of housing. Illustrating the exorbitant cost of Homeowners Insurance policies, the following table shows the average cost of Homeowners Insurance policies for homes located in Miami (Miami-Dade County), Fort Lauderdale (Broward County), Key West (Monroe County) and the State of Florida for homes valued at \$150,000 and \$300,000. These example policies were supplied by Clover Insurance at clover.com.^{60 61 62 63 64} The average cost nationally was found at nerdwallet.com. These prices show homeowners insurance costs that are more than 3x the cost nationally and in some cases more than 5x-6x the national rate for homeowner's insurance.

In Florida, over 50% of the cost of homeowner's insurance policies goes to pay for reinsurance, and in some cases much more than 50%. Reinsurance prices have been on the rise globally, and a tsunami in Japan would affect the cost of reinsurance in Florida. Reinsurance companies are primarily global in nature and are not bound by anti-trust provisions in America, nor are they required to actuarially justify their rates. This and other factors have dramatically increased Florida's homeowner's and multifamily rental insurance rates. Cancellation notices and non-renewals from insurance companies are becoming increasingly commonplace with more than nine companies in receivership.

Simultaneously, the National Flood Insurance Program (NFIP) has altered the way it calculates risk under the new Risk Rating 2.0. NFIP's authority to provide flood insurance is currently scheduled to expire

on Friday, September 30th. Should the program be reauthorized, it is anticipated that 80% of Floridians will see a price increase with the recalculated NFIP policies. Insurance is undoubtedly a major area of concern for the affordability of housing in South Florida. Many factors combine to play a significant role in escalating insurance premiums. What is clear is that significant reform is needed.

The Average Cost of Homeowners Insurance

	\$150,000 home	\$300,000 home
US	\$1,413	\$1,784
Florida	\$2,043	\$4,086
Miami	\$5,695	\$11,390
Fort Lauderdale	\$4,688	\$9,376
Key West	\$4,966	\$9,931

Sources: clovered.com; National Association of Insurance Commissioners, nerdwallet.com

Note: Hurricane Ian landed in Florida as this report was being finalized. As a result, there is no reference to Hurricane Ian in this report.

Homelessness

The U.S. Department of Housing and Urban Development releases the Annual Homeless Assessment Report to Congress providing a point-in-time snapshot of homelessness – both sheltered and unsheltered – on one night. This count is conducted during a ten-day period in January. The 2020 Count is the last count that included both sheltered and unsheltered homeless due to COVID limitations in the 2021 Count. In 2020, it was estimated that roughly 580,000 people were experiencing homelessness in the United States. Realtor.com reported in March 2022,⁶⁵ that the Miami-Florida Lauderdale-West Palm Beach, FL experienced a year over year average increase of 57.2% in overall median rent with some communities in South Florida experiencing rent increases of 60%, 70%, or more.

Although, homelessness has been decreasing in the region in recent years, the region should prepare for increasing homelessness as the working, middle-class is forced out of housing.⁶⁶ Strategies include, and are not limited to, rapid rehousing, rental assistance, enhancing the population’s access to public benefits, increasing shelter beds, employment training, transportation, and mental and general health services.

According to the American Society on Aging, the fastest growing population of homeless are people ages 65 and older. It is estimated that by 2030 their number will triple.⁶⁷ In November 2021, the Miami Herald⁶⁸ reported that those over 60 now account for 1 in 4 or 25% of the county’s homeless population. They moved to South Florida to retire and found that the cost of living outpaced their savings. South Florida’s condominiums, many of which are inhabited by income-constrained elderly, are a source of affordable housing. The tragic Champlain Tower Condominium collapse on June 24, 2021, in the Village of Surfside Beach in Miami-Dade County, highlighted a silent crisis unfolding throughout many regions of the state due to lack of sufficient management and maintenance investments in older buildings. The significant investment needed to rehabilitate this housing stock requires high-cost special assessments which will force many residents out of their homes, particularly those on fixed incomes.

Homeless Estimate							
County	Count 2021	Rank out of 67 Counties 2021	% of Florida Homeless 2021	Count 2020	Count 2018	Count 2017	Count 2012
Florida	21,141		100%	27,679	29,717	32,109	54,972
Broward	2,561	2	12%	2,312	2,318	2,450	3,801
Miami-Dade	3,224	1	15%	3,472	3,516	3,721	3,817
Monroe	242	24	1%	437	973	631	904

Source: Florida Health Charts⁶⁹

Transportation

Florida’s Strategic Intermodal System

Florida’s Strategic Intermodal System (SIS) is the backbone of the region’s overall transportation, playing a vital role in the region’s economy by moving both people and goods. It is a high priority network of transportation facilities established to focus resources on transportation facilities of statewide and interregional significance. Along with Florida’s Turnpike Enterprise, the airports, seaports, waterways, rail corridors and terminals, urban fixed guideway transit corridors, and highways designated as part of the SIS are the workhorses of South Florida’s transportation system. The Florida Department of Transportation (FDOT) investments in the SIS, leveraged with additional regional, local, and private sector funding, have enabled the region’s economy and communities to continue thriving. Statewide, FDOT has invested more than \$13 billion of state and federal funding into the SIS since it was created in 2003.⁷⁰

For the SFRPC region, the U.S. 1 corridor, which connects the more urbanized areas of the region to the southernmost point of Monroe County in Key West, is the only transportation corridor that runs the entire length of the region. This connectivity is particularly important to Monroe County for emergency evacuation, transportation, trade, tourism, and members of its workforce, many of whom travel from outside of the county to work because they are unable to find affordable housing locally. This vital corridor requires both transit and resilience investments to ensure the region’s continued connectivity and economic growth.

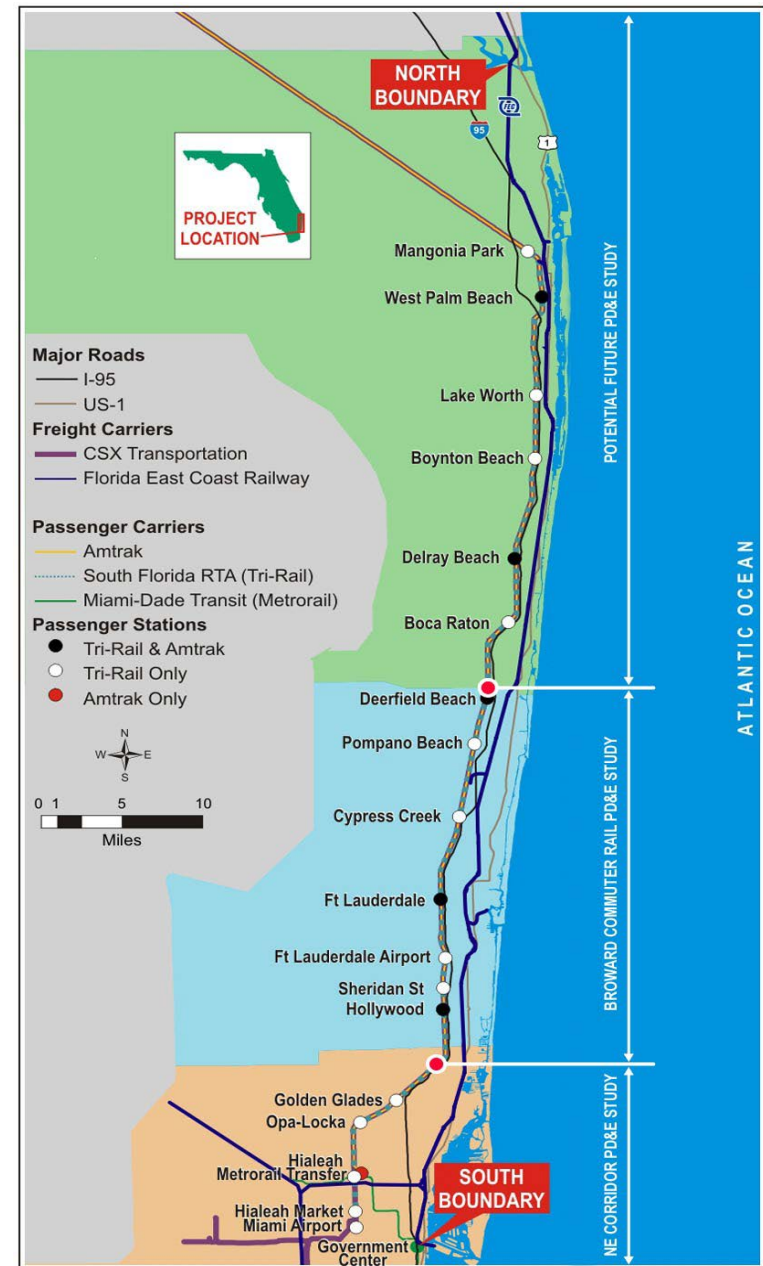
Mobility

The regional mobility network is integral to economic prosperity and growth. It provides vital access to opportunity and upward mobility, when available. Regional congestion, on the other hand, can have dampening effects on the economy with significant consequences. Longer commute and trip times, slower speeds, and safety issues have raised the cost of doing business and threaten the region's productivity. The Miami Urbanized area mean time travel to work is 29.9 minutes, about 10 percent higher than the U.S. Drivers in the Miami Urbanized Area lose up to 105 hours in traffic annually⁷¹ as of 2019, costing the region \$4 billion with an annual cost to individual drivers of \$1,470. Research shows that additional time spent commuting is detrimental to personal well-being and worker productivity with financial implications for the region as well.

The regional mobility challenges are a call to innovation and investment, so that the network may continue to be a driver of economic development. Robust regional transit is key to support anticipated growth and long-term mobility, as is supportive land use that drives many of our transportation outcomes. Creating viable transit options that can compete with the car will be key to reducing congestion on roadways. Currently 77% of people in the Miami Urbanized Area drive alone; 9% carpool; 3% use public transit; 1% bicycle; 2% walk; 7% work from home, and 2% use other means.⁷² Unlike cooler, dryer areas of the state and nation, the tropical heat and frequent rain showers are a hindrance to biking along with dangerous roadways where bicyclists and heavy automobile traffic share the road.

Improving first and last mile connections to the network, embracing safety and adopting pedestrian-oriented design standards, and promoting policy that incentivizes Transit Oriented Development are all necessary to support the success of investment in high-capacity public transportation. Supportive public policies and investment is

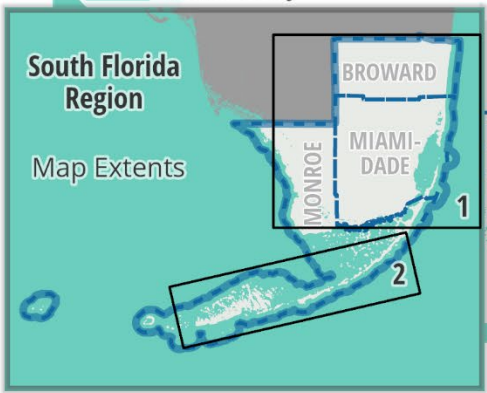
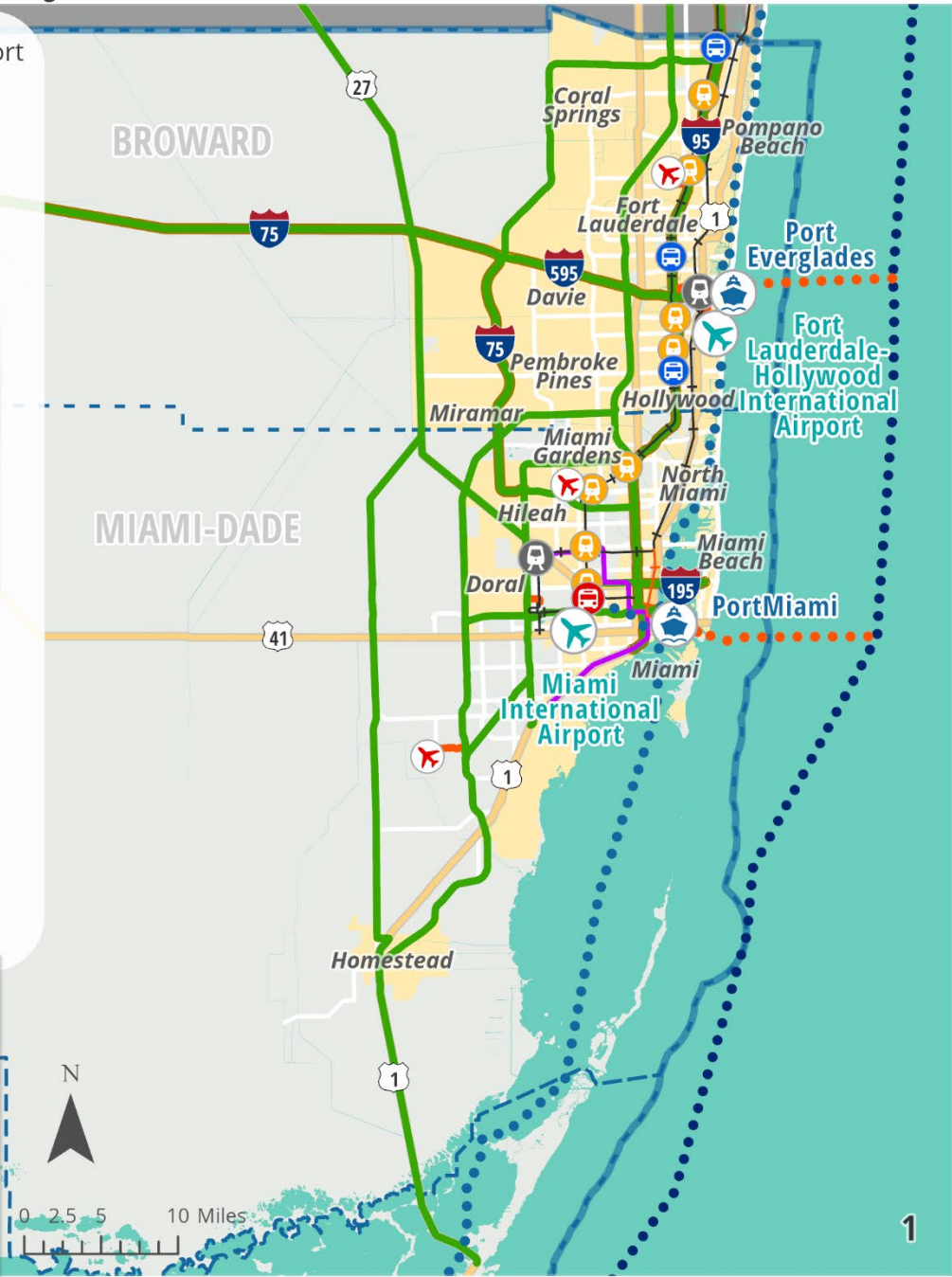
needed to achieve equitable access to 21st century jobs and a better quality of life for all.



Source: <http://tri-railcoastallinkstudy.com/>

Transportation Facilities of Regional Significance

- Primary Commercial Airport
- General Aviation Reliever
- Deepwater Port
- Miami Intermodal Center
- Passenger Terminal
- Rail Freight Terminal
- Fixed Transit Terminal
- Metrorail
- SIS Highways
 - Corridor
 - Connector
- SIS Railways
 - Corridor
 - Connector
- SIS Waterways
 - Waterway
 - Connector
 - Shipping Lane
- County Boundary
- SFRPC Boundary
- Municipality
- Waterbody



Source: FDOT, FGDL 2021

Regional Transit

The Miami Urbanized Area is fortunate to have a relatively high number of transit trips per capita. Further connecting the region's population with well-connected transit remains a priority. With 18 stations along a 70-mile stretch, Tri-rail, a commuter rail connecting the northern and southern portions of the Miami Urbanized areas, provides important linkages for regional commuters from West Palm Beach to Miami. Like Broward Transit and Miami-Dade Transit, the SFRTA's Tri-Rail ridership declined with the onset of the COVID pandemic. However, transit ridership increased due to rising gas prices with Tri-Rail reporting 11,000 customers on a single day in March 2022; the highest level since the start of pandemic in March 2020. Public policies to enhance and facilitate public transportation, particularly convenient east-west connectivity to key destinations such as educational institutions and facilities should lead to greater ridership.

Recent private sector investment in mass transit has also broadened the regional mobility options. Introduced in 2018, Brightline is a higher speed rail line than previously existing regional mass transit and has limited stops with stations in downtown West Palm Beach, Fort Lauderdale, and Miami. Brightline has planned expansion of its services within the Miami Urbanized Area with local stations planned for Aventura and Boca Raton as well as service connecting South Florida with other cities in Florida, including Orlando and Tampa. Brightline has already constructed the rail to Orlando and is in the process of construction a station near the Orlando Airport.⁷³ Brightline was also recently awarded \$15.9 million by the U.S. Department of Transportation to begin work on the proposed Tampa to Orlando segment, connecting the South Florida region to other urbanized areas.⁷⁴

Key regional transit initiatives include Miami-Dade County's "SMART" or Strategic Miami Area Rapid Transit Program. This

ambitious program seeks to advance five rapid transit corridors of the People's Transportation Plan to support mobility, and future population and employment growth. In Broward, the Mobility Advancement Program (MAP) funded by a 30-Year Transportation Surtax advances five goals: 1) Enhancing transit services; 2) Improving connectivity; 3) Improving traffic system management; 4) Enhancing multimodal options; and 5) Increasing economic development and benefits.

In a giant step forward for regional transit and collaboration, in August 2022 the Broward County Commission unanimously approved \$15.5 million for the study and development of a southern segment to connect to Miami-Dade County's SMART PLAN Northeast Corridor along the FEC Railway line to bring local train service from Aventura in Miami-Dade County to a point south of the New River in Fort Lauderdale. The Broward County southern segment is part of the Tri-County "Coastal Link" project which envisions the expansion of commuter rail along the FEC through Palm Beach County. To provide a truly multimodal regional network, the service will also include bus and highway connections through Miami-Dade, Broward, and Palm Beach counties. Broward and Miami-Dade counties are collaborating to secure funding for this expansion of rail service. The major obstacle currently hindering expansion of the Coastal Link into northern Broward County and Palm Beach is the crossing of the New River in Fort Lauderdale. Local governments are working together to produce a viable solution that has the most stakeholder support. It may be a bridge over, or a tunnel under, the New River but there is agreement on the importance of this project continuing to move forward so the Coastal Link can expand northward. Expanding rail transportation in the region is expensive and difficult given that the necessary rail easements were not contemplated or set aside early in the development history of the region.

Regional transportation is particularly important to the economy of Monroe County, where many workers live outside of the County, and rely on public transportation to access more affordable housing. The U.S. 1 corridor, connecting the more urbanized area of the region to the southernmost point of the country in Key West, is a vital corridor that requires investment in both transit and resilience to ensure continued economic growth. Monroe County's U.S. 1 Transportation Plan (2021) indicates the need to explore alternative modes of transportation and improved transit alternatives to help relieve congestion and improve safety.

Small Businesses – The Heart of Florida's Economy

Small businesses are an essential part of Florida's economy landscape. The U.S. Small Business Administration generally defines small business as "an independently owned for-profit enterprise that employs 500 or few persons." In Florida small businesses represent 99.8% of all Florida Businesses and employing 3.6 million employees which represent 41.1 percent of Florida employees according to a [2021 Small Business Profile](#) by the U.S. Small Business Administration.

County Business Patterns Data, released April 28, 2022 by the U.S. Census Bureau, tells the story more clearly. Small businesses with less than five employees represent 69% of Miami-Dade County's business establishments, 68% of Broward County's, and 66% of Monroe County's. Businesses employing 5 to 9 employees represent an additional 13% of businesses in Miami-Dade and Broward, and 16% of Monroe County businesses. When businesses of 19 or less employees are tallied together, these businesses represent approximately 90% of the Region's business establishments (Appendix II). The outsized predominance of small businesses in the region underscores their importance to the economy and need to continually work with small businesses to support them with access to capital, technical assistance, mentoring, and a trained workforce. In South Florida, 122,656

businesses with 19 employees or less employ 375,373 workers with an annual payroll of \$16.5 billion according to the 2019 County Business Patterns report by the Census Bureau.

Numerous resources are available to the region's small businesses including the SFRPC's successful small business revolving loans funds including the \$5.9 million CARES RLF capitalized by the U.S. EDA, county economic development offices, South Florida's Small Business Development Centers (SBDC), and the region's chambers of commerce and economic development practitioners.



Courtesy of Full Service Flower Boutique B2B/B2C, Miami-Dade County

Innovation

At the heart of innovation is entrepreneurship and the Miami-Fort Lauderdale metro area has been growing its base of companies. As reported by Refresh Miami, Pitchbook recorded \$2.8 billion in venture capital investments across 191 deals for the first half of 2022 in the

region. In 2021, the region had a record-breaking 285 deals for a total of \$5.33 billion of venture capital investment to South Florida companies. Presently, the Miami metro ranks #10 for venture capital dollars in the first half of the year.^{75 76} With significant nurturing of the entrepreneurial ecosystem, the number of venture capital investments into Greater Miami area businesses increased significantly since 2012 with 2021 and 2022 marking an exponential uptick in the flow of venture capital to the Greater Miami region.⁷⁷

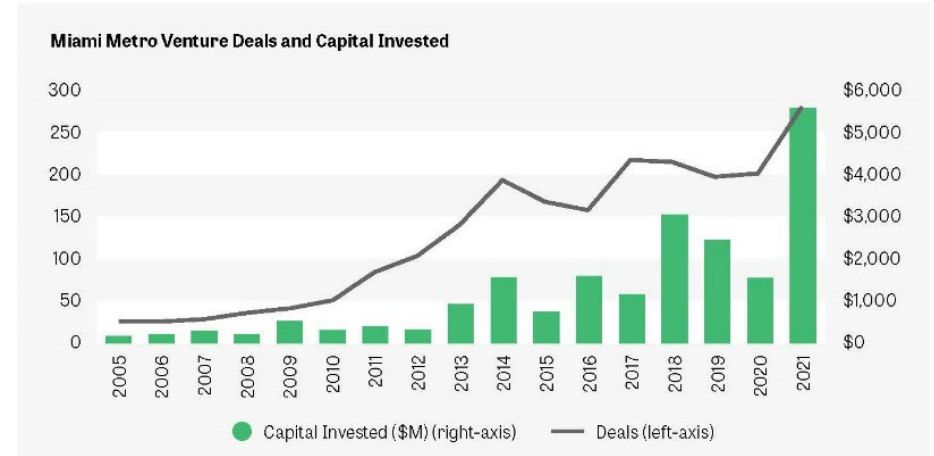
During this time the number of people employed within the tech sector has also significantly grown. An analysis of OES data from the Bureau of Labor Statistics shows an almost 50% increase in the number of workers employed in software occupations within the region since 2012, growing from roughly 37,000 workers in 2012 to approximately 54,000 workers in 2020.

According to CBRE which scored Tech Talent Markets in 2022, South Florida ranked # 33 out of the top 50 by the number of tech talent professionals in the U.S. and Canada ahead of Tampa (#34) and Jacksonville (#46), and behind Orlando (#29).⁷⁸ eMerge Americas is a venture-based platform focused on transforming Miami into the tech hub of the Americas and working at the forefront of building the South Florida entrepreneurial and tech ecosystem. Data trends show continued growth in South Florida’s tech ecosystem. The number of tech workers in South Florida stood at 66,660 in 2021, up 11,100 or 8 percent from 2016⁷⁹.

The Innovation Intelligence Report, created by the Indiana Business Research and provided by the U.S. EDA via STATSAMERICA, provides a composite index of various inputs related to innovation. The updated Innovation Index 3 (II3)⁸⁰ analyzes five major index categories: three based on innovation inputs (human capital and knowledge creation, business dynamics, business profile) and two on

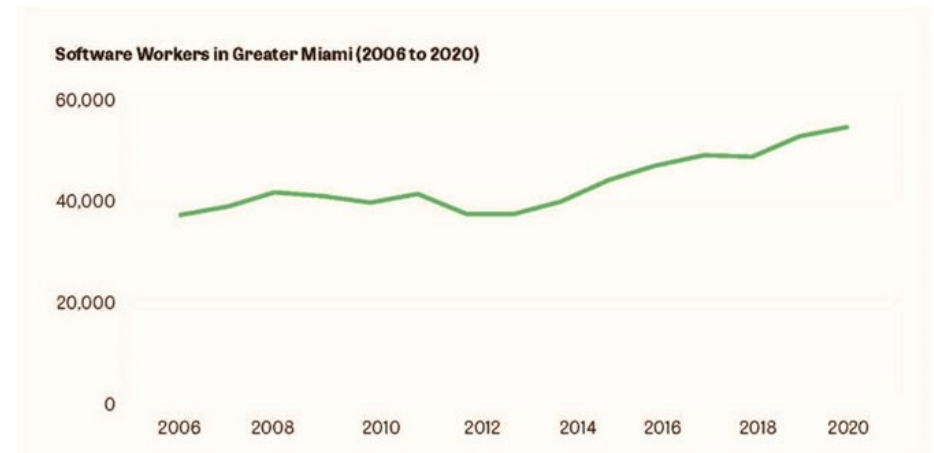
innovation outputs (employment and productivity, and economic well-being).

“Innovation” is defined as putting “ideas into action with the result of increasing firms’ compensation and profits. The Index creates a measurable value and is assigned a ranking of low, moderate, or high with a ranking that allows the region to compare itself to others.



Source: CAE analysis of Pitchbook data.

https://knightfoundation.org/wp-content/uploads/2022/06/Miami-Tech-Assessment_Final_2022.pdf



Source: CAE analysis of OES data from the BLS.

https://knightfoundation.org/wp-content/uploads/2022/06/Miami-Tech-Assessment_Final_2022.pdf

The index contains values between 0 and 200 with a baseline of 100 for the United States as a whole. A score above 100 is better when compared to the nation. Likewise, a score under 100 is worse when compared to the nation. The Innovation Index headline number combines the five major indexes with each index weighted equally at 20 percent each. The index is based on a broad range of data such as educational attainment, patents, knowledge creation, STEM education and occupations, business formation, business expansion, venture capital, foreign direct investment, industry cluster performance, gross domestic product, residential broadband connectivity, and compensation among other measures.

The South Florida region shows an overall “High” score on the innovation index with an index value of 132, with individual county values of 134.7 for Miami-Dade; 137.5 for Broward; and 126.3 for Monroe. Of note, the region scored high in the categories of business dynamics, business profiles as well as employment and productivity. This Index is comprehensive and utilizes a multitude of data sources to create its rankings.

In recent years Miami-Dade, Broward, and Palm Beach counties have become burgeoning technology hubs. The South Florida region has teamed up to demonstrate the power of the region in technology. The South Florida Tech Gateway “Work in the Cloud, Live in the Sun” campaign is an effort to solidify the region as a technology hub to attract and retain talent, entrepreneurs, investors, and the support system needed to sustain and grow an innovation economy. Led by the Greater Fort Lauderdale Alliance, in partnership with the Beacon Council and Business Development Board Palm Beach County, the South Florida Tech Gateway brings visibility and support to the world class technology companies that are increasingly locating in South Florida. One of the region’s strategic advantages is Miami-Dade County’s NAP of the Americas, one of the world’s few Tier-1 network access points and a high-speed connection for data, voice and video

traffic throughout the Americas and Europe. Other data centers include Telefonica USA, ColoHouse, QTS and Miami Data Vault. Twenty-seven top South Florida companies represent more than \$3.14 billion in capital investment as of 2021.⁸¹

The brands born or raised in the region are well-known well beyond South Florida. From health-tech (Mako Surgical / Stryker), fintech (TradeStation), HR-tech (UKG), travel-tech (JetBlue Travel Products), edu-tech (Nearpod) and even “pet-tech” (Chewy), the names are common in C-suites and households alike. South Florida is at the nexus of a connected and collaborative tech ecosystem. Today, Florida leads the Southeast United States in high-tech employment, with South Florida leading the state.

Index Categories	Index Value
Innovation Capacity Profile	132
Human Capital and Knowledge Creation	120.8
Educational Attainment	112.1
Knowledge Creation and Technology Diffusion	161.8
STEM Education and Occupations	91.7
Business Dynamics	160.4
Establishment Formation	173.6
Establishment Dynamics	147.3
Business Profile	126.9
Venture Capital Dollar Measures	127.8
Venture Capital Count Measures	119.1
Foreign Direct Investment Attractiveness	133.8
Proprietorship	126.8
Employment and Productivity	128.6
Industry Performance	187.6
Industry Cluster Performance	52.3
GDP	91.3
Patents	134.3
Economic Well-Being	123
Residential Internet Connectivity	185.8
Compensation	150.3

Source: (statsamerica.org/innovation)

SOUTH FLORIDA
TECHGATEWAY
 WORK IN THE CLOUD. LIVE IN THE SUN.[®]
 Miami - Fort Lauderdale - West Palm Beach

2022

Your GATEWAY to a Career in TECHNOLOGY

- 150,000 Net Technology Employment in South Florida
- \$108,708 Annual Average Wage

Source: CompTIA Cyberstates 2021; EMSI-Burning Glass 2022: Q1 Dataset

For more information about technology companies, academics and organizations in South Florida visit TechGateway.org



Point your camera here to visit TechGateway.org



FOUNDING PARTNERS: Florida Power & Light | Starmark




Courtesy of the Greater Fort Lauderdale Alliance

Intelligence Index 3	Broward	Miami-Dade	Monroe
Overall Innovation Intelligence Index	137.5	134.7	126.3
Human Capital & Knowledge Creation	141.5 High	139.9 Moderate	147.5 Moderate
Business Dynamics	150.2 High	149.2 High	138.8 Moderate
Business Profile	121.9 High	125.8 High	94.5 Moderate
Employment & Productivity	137.0 High	134.2 High	135.7 High
Economic Well-Being Index (Standard of Living)	137.1 Moderate	130.5 Moderate	155.1 High

Source: statsamerica.org/innovation

Regional Industry Clusters & Location Quotients

For the purposes of this CEDS the businesses within South Florida have been predominantly organized by industry as it is easier to display the data based upon how jobs are classified in the North American Industry Classification System (NAICS). However, in some instances, such as the cluster dubbed “Creative Media and Design”, it is a compilation of knowledge-based jobs focused from an array of sectors that focus on digital media and design. The following cluster and industry overview provides a brief discussion of trends impacting each cluster or industry and supporting data.

Industries & Clusters Overview

An economic cluster is a critical mass of businesses located in one place that have unusual competitive success in a particular field. Michael Porter, who created the cluster theory, contends that despite the changes ushered in by technology, location remains fundamental albeit drastically different than a generation ago. Knowledge, relationships, and motivation remain local things that are found in specific regions and locations. These elements drive competitive advantage in a global

economy. Clusters include production companies, raw materials suppliers, service providers, as well as companies in related industries and public institutions.

Industries and clusters significant to the tri-county economies were identified by those that exhibited strong **location quotients (LQ)** as well as those expressed as important by Economic Development Organization (EDO) partners. A location quotient is a tool to reveal industries within the region that are unique and specialized within the regional economy. When considering an industry’s Location Quotient, one must also consider the number of employees or jobs to access the economic impact in the overall economy’s health.

For example, International Trade Financing, a category within Banking & Financial Services, has a location quotient of 11.05 in South Florida. This means that International Trade Financing is 11.05 times more concentrated in the South Florida than the typical region nationally. The location quotients may also help a region to identify export industries, endangered export industries, as well as industries and occupations that are below equilibrium and might be fighting to regain balance.⁸² The following cluster/industry overviews provides a brief discussion of trends impacting each cluster or industry and supporting data.

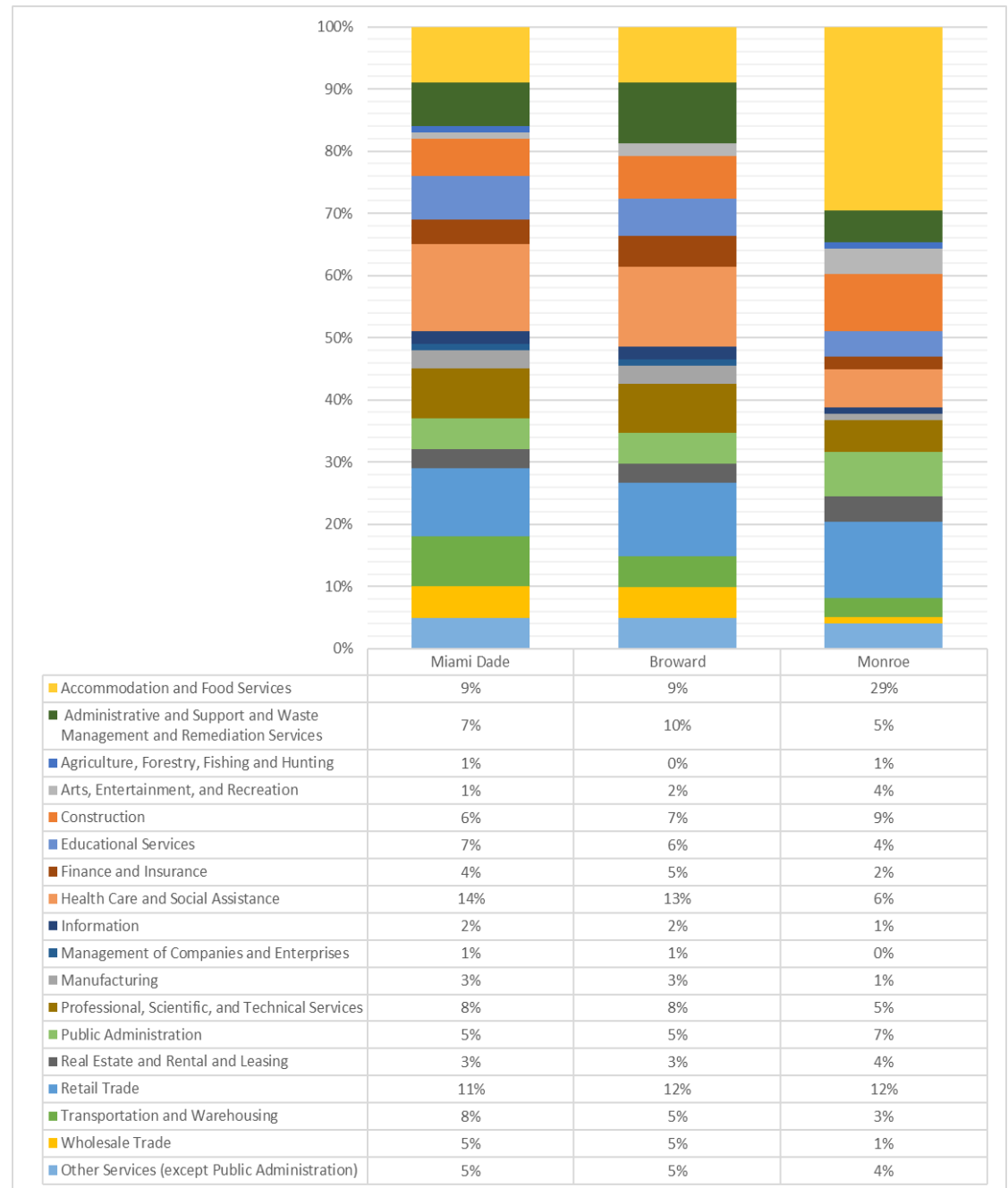
In South Florida, Hospitality & Tourism is a well-established cluster that draws upon a range of industries including those related to tourism such as hotels accommodations, deep sea transportation (cruises), etc. other industries that are related to tourism though not exclusively, are also paramount to the tourism, including aviation, cruises services and boating as well as environmental organizations focused on coral reef restoration and environmental quality. The industries related to tourism and hospitality are far reaching.

For the purposes of this CEDS the businesses within South Florida have been predominantly organized by industry as it is easier to display the data based upon how jobs are classified in the North American Industry Classification System (NAICS). However, in some instances, such as the cluster dubbed “Creative Media and Design”, it is a compilation of knowledge-based jobs focused from an array of sectors that focus on digital media and design.

South Florida Industry Clusters

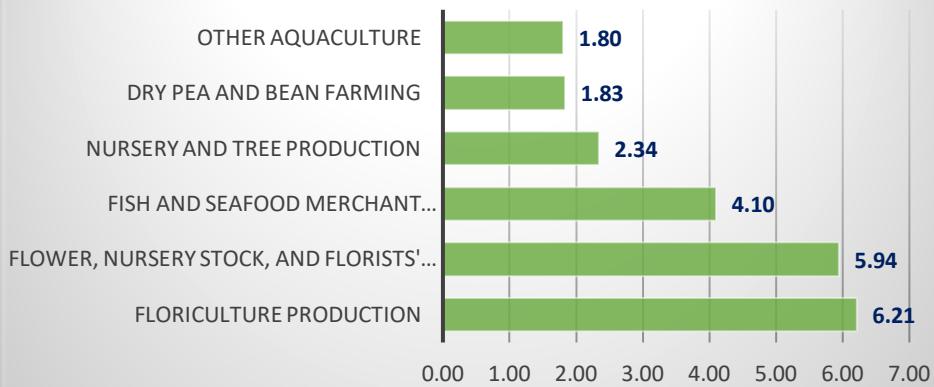
“Health Care and Social Assistance” is the largest industry sector within Miami-Dade and Broward Counties employing 14% and 13% respectively of all jobs. Accommodation and Food Services industries, which is closely tied to Hospitality and Tourism cluster employs 29% of the workers in Monroe County and 9% of workers in Miami-Dade and Broward counties. Monroe County’s extraordinarily high percentage of people employed in this sector is an economic vulnerability which underscores the need for economic diversification.

Retail also employs a significant number of workers. In Monroe and Broward counties 12% of employees are in retail trade and 11% in Miami-Dade County. Industries such as Finance and Insurance, and Professional, Scientific, and Technical services employ smaller percentages of people (4% and 8% respectively) but have larger ripple effects and support more jobs within the region. Many of the clusters and industries identified as important for growth in the CEDS are those that are focused on growing higher paying jobs for the region. Detailed industry charts by county with NAICS, Employees, Average Annual Wages and Percent of Jobs can be found in Appendix III.

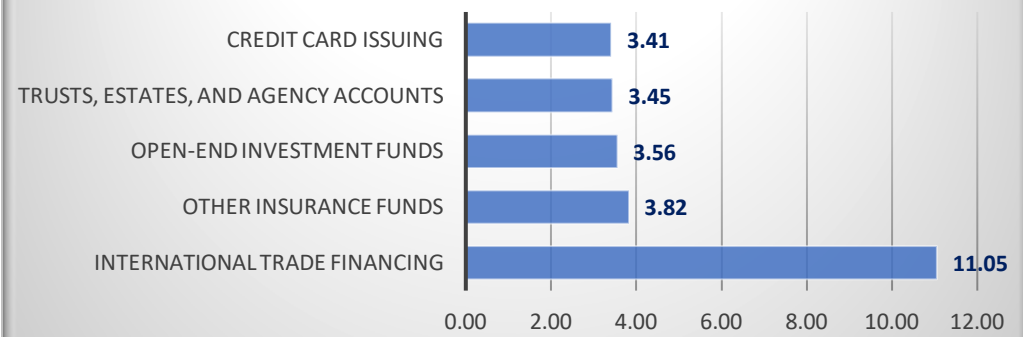


Location Quotients by Industry

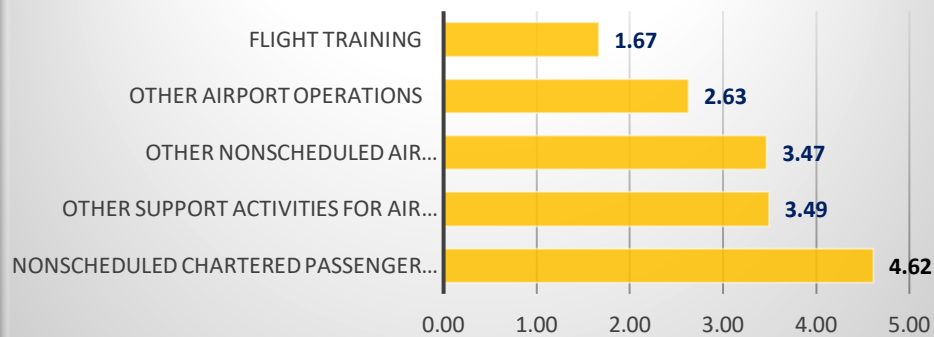
Agriculture Location Quotients



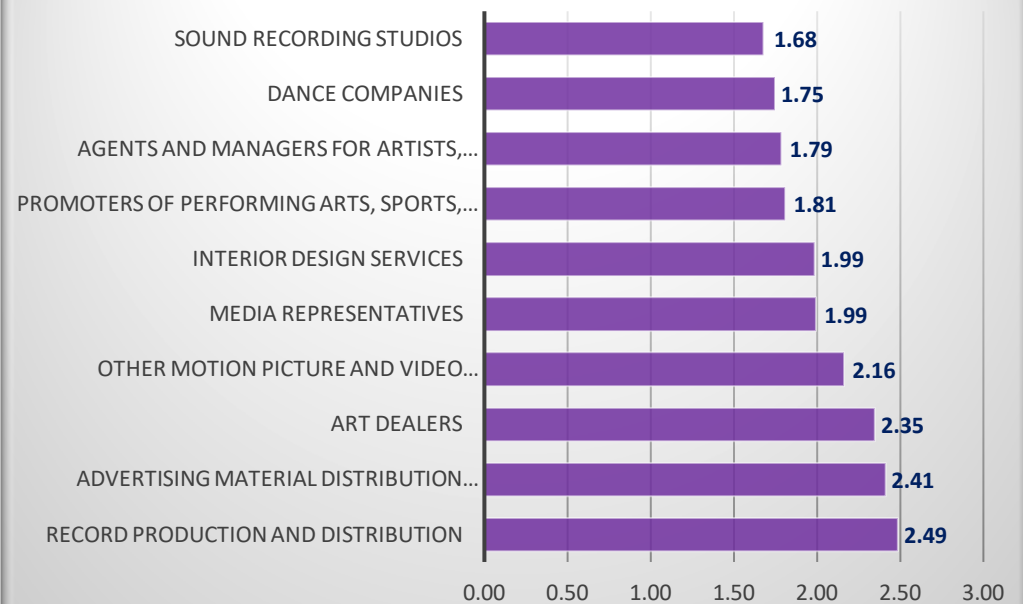
Banking & Financial Services Location Quotients



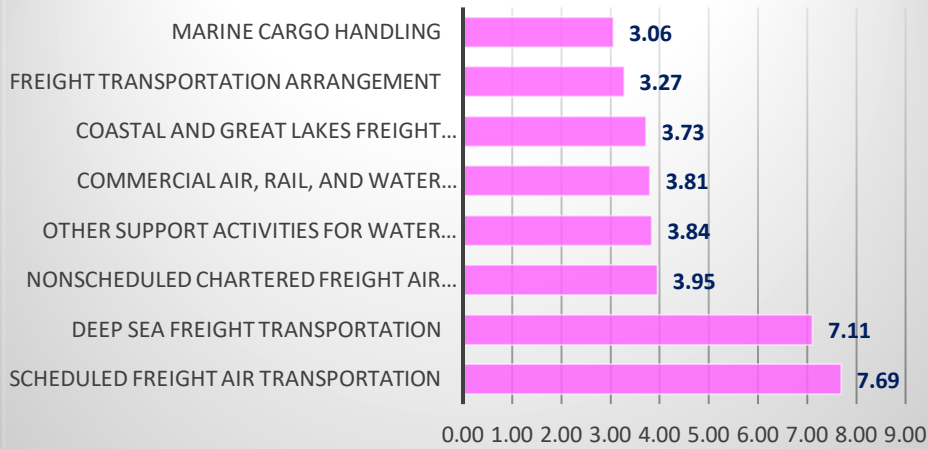
Aviation, Aerospace, Defense Location Quotients



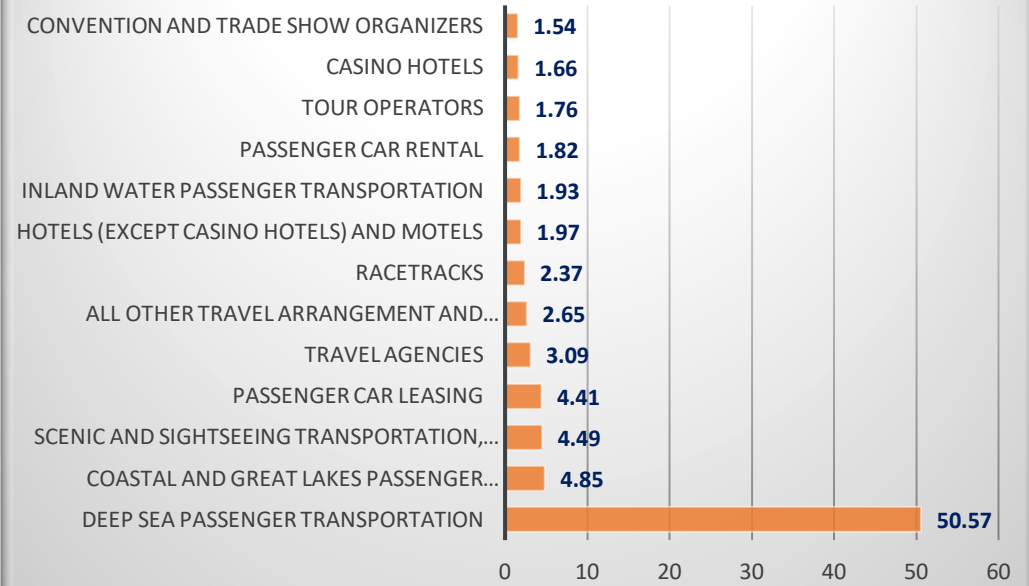
Creative Media & Design Location Quotients



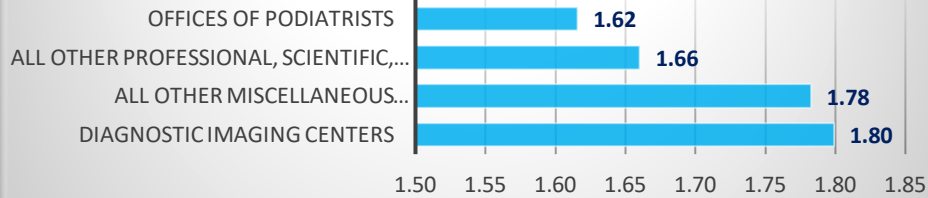
Global Logistics Location Quotients



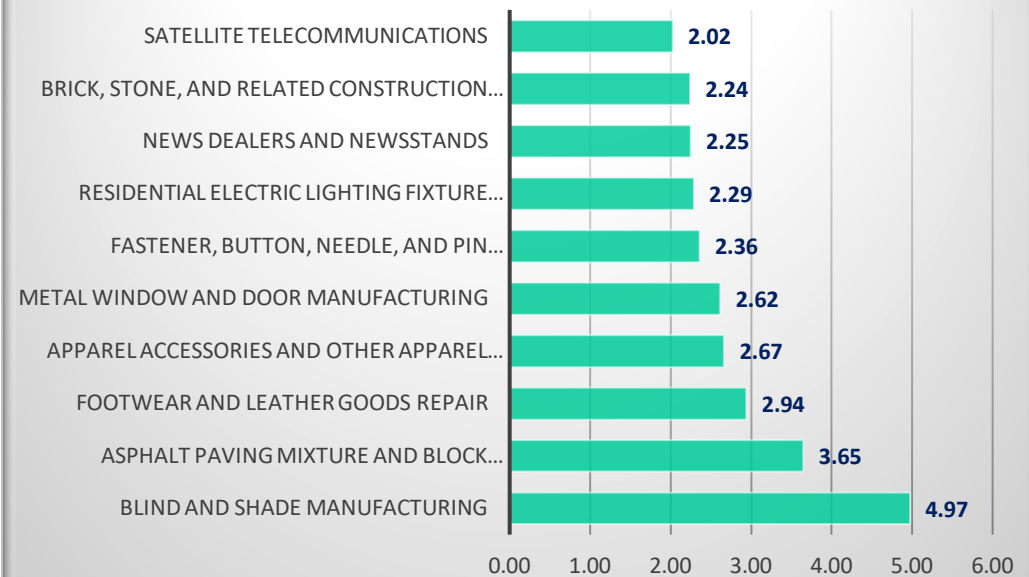
Hospitality & Tourism Location Quotients



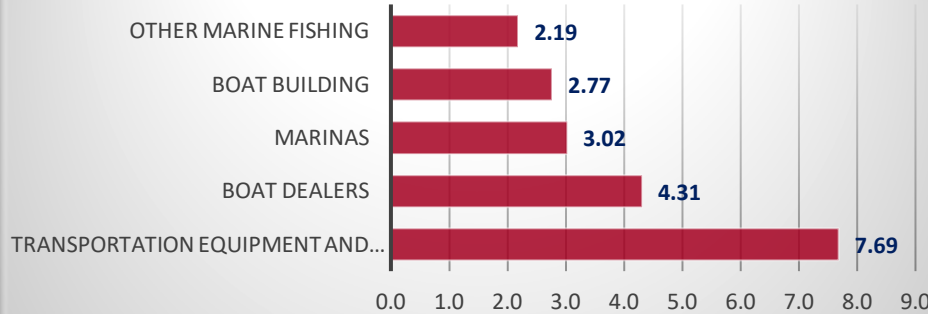
Healthcare & Lifesciences Location Quotients



Manufacturing Location Quotients



Marine Industries Location Quotients



Agriculture, Forestry, Fishing, Hunting

Agriculture in South Florida is largely an industry unique to South Dade. Miami-Dade County’s agriculture industry is one of most diverse in the country employing over 10,000 in the 4th Quarter of 2021. In Miami-Dade County, with 70,000 acres in production, the Florida County Value of Agricultural Products sold in 2017 was \$838 million, the largest in the state behind only Palm Beach County with more than 410,000 acres. In 2017, 73% of the farms were under 10 acres in size. The area has very high location quotients in floriculture production as well as flower, nursery stock and florists’ supplies merchant wholesalers- 6.21 and 5.94 respectively. These location quotients support the findings of a recent impact and outlook report completed by the Florida Nursery Growers and Landscape Association (FNGLA) which named Miami-Dade as one of the top producers of indoor foliage plants within Florida. The report also revealed that Florida is the number one producer of indoor foliage plants in the U.S, producing nearly 69% of total wholesale value for the United States. The location quotients indicate that floriculture as well as flower, nursery stock and florists’ supplies provide an opportunity for export. In a time of growing global food insecurity and supply chain difficulties, local agriculture is a critical mainstay of South Florida’s sustainability and well-being.



In the *South Miami-Dade Economic Development Strategy 2020* it was acknowledged that agriculture is a traditional industry for South Miami-Dade County and that it remained important to maintain the present levels of employment.

The EDA funded strategy also identified significant agriculture assets, including Atlantic Sapphire Salmon Farm, Brooks Tropicals, LLC., Costa Farms, R.F. Orchids, Gulf Stream Tomato Packers, Dade County Farm Bureau, and UF Tropical Research and Education Center.

Four targeted strategies for maintaining and growing the agriculture industry were listed, as follows:

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

Agriculture	Miami-Dade County			
	Current		5 Year History	
	Employees	Avg Annual Wages	Employment Change	Annual % Change
Crop Production (Proprietors)	853	\$92,176	-118	-2.6%
Nursery and Tree Production	2,897	\$37,219	871	7.4%
Floriculture Production	3,954	\$37,205	535	3.0%
Crop Production (Proprietors)	853	\$92,176	-118	-2.6%

Source: Jobs EQ

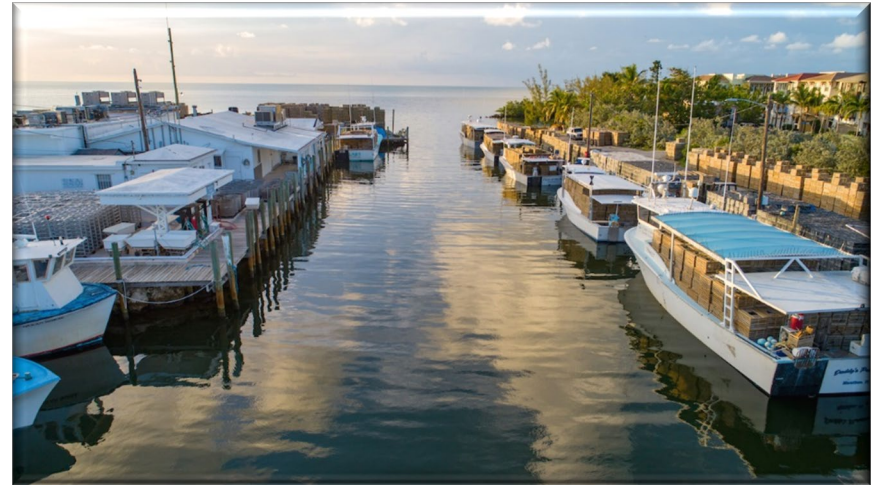
Commercial Fisheries - The Florida Keys

Home to the Florida Keys National Marine Sanctuary, commercial fishing is one of the key export industries in Monroe County/Florida Keys. Commercial fishing panels have been monitored since 1998 for catch, spatial distribution of catch, and financial performance. The socioeconomic impacts of marine zoning, including the impacts of Sanctuary Preservation Areas (SPAs) and Ecological Reserves (ERs), which are no-take areas are a primary focus of monitoring.⁸³

According to data from the Florida Fish and Wildlife Conservation Commission, Monroe County has harvested 4,543,452 pounds of seafood with an estimated value of \$27,125,752; approximately 15% of total pounds of Florida seafood and 21% of the statewide estimated value from January 2022 - August 2022. This compares to 436,045 pounds of seafood from Miami-Dade with an estimated value of \$1,657,162, and 189,663 pounds of seafood from Broward County with an estimated value of \$1,081,654.⁸⁴

Recreational Fishing

The National Oceanic and Atmospheric Administration provides a [*2021 Economic Analysis of Recreational Fishing on Florida's Reefs*](#)⁸⁵ as of 2021. Trip based expenditures on reef-related recreational fishing in Southeast Florida support approximately 3,787 jobs and generate economic output of \$384 million. The economic impacts of reef-related recreational fishing were highest for Monroe County, with \$173 million generated in output and 1,677 jobs supported, followed by Palm Beach (\$80 million output, 803 jobs). Broward (\$44 million output, 442 jobs), and Miami Dade (\$44 million output, 440 jobs) were nearly identical, and Martin had the lowest impacts (\$28 million output, 286 jobs).



Aviation, Aerospace, & Defense

The aerospace industry focuses on the designing and constructing of aircrafts, rockets, and missiles as well as devices or vehicles operated in outer space, whereas the aviation industry focuses on the practice of flying aircraft. Given that aerospace focuses on the designing and construction of aircraft there can be significant interplay between these two industries. The aviation industry also plays an important role in the hospitality and tourism cluster.

The Fort Lauderdale-Hollywood Airport and the Miami International Airport are the largest airports serving the Miami Metropolitan Area. Both airports welcome millions of international visitors per year. MIA alone receives 70% of all international passengers in Florida and is America's third-busiest airport for international passengers. The airport offers more flights to Latin America and the Caribbean than any other U.S. airport. In 2019, MIA had nearly 46 million passengers and was the top U.S. airport for international freight.

It is projected that by 2040, MIA will serve 77 million travelers and more than 4 million tons of freight. To accommodate the airport's continued anticipated growth, the Miami-Dade County Commission adopted a new capital improvement program at MIA that will fund up to \$5 billion in airport-wide modernization projects. It is anticipated that the slate of projects over the course of the next 15 years.⁸⁶ Additionally, the Miami area has three smaller general aviation and executive airports. MIA and the county's general aviation airport's annual economic impact is \$31.9 billion, contributing 275,708 jobs directly and indirectly to the local economy.⁸⁷ Fort Lauderdale-Hollywood International Airport (FLL) is the fastest growing large hub airport in the United States for domestic travel. There are five airports in Broward County including four general aviation airports in addition to Fort Lauderdale-Hollywood International Airport. There are two

international airports in Monroe County located in the cities of Marathon and Key West.

Sintavia LLC, Hollywood, Florida

Leading the Way in Aviation, Aerospace, & Defense Innovation

Sintavia, LLC, a designer and additive manufacturer (AM) of advanced propulsion and thermodynamic systems for the Aerospace, Defense, & Space industry, announced in May 2022 that it had been chosen to represent the AM supply chain in the launch of a major White House initiative called "AM Forward".



Source: Business Wire, May 9, 2022

To accommodate its continued growth, FLL is undertaking a \$3.2 billion capital improvement program that includes 20 plus projects across four terminals focused on modernization in addition to 500,000 square feet of expansion and renovation across three terminals.⁸⁸ Spirit Airlines, which employs thousands of people in South Florida, has been a major anchor of the Fort Lauderdale Airport with its headquarters in Fort Lauderdale. However, recently a \$3.8 billion merger with JetBlue was announced. JetBlue has stated that it will utilize Spirit’s new headquarters, which is under construction as a support center, but it may divest of assets at FLL to address concerns of the Federal Trade Commission and avoid a blockage of the merger. JetBlue has stated that it will continue to allow Spirit employees to remain in Florida and plans to grow in Florida.⁸⁹

Monroe County has experienced record numbers of passengers at its airport and has planned expansion projects to accommodate its increased number of visitors. Presently, the county has committed \$80 million to build a concourse with jet bridges, anticipated to be complete in 2024. Monroe County is also home to Marathon airport, which operates mostly as a private and charter plane airport.⁹⁰

There are a significant number of jobs within the aviation and aerospace industries between Broward and Miami-Dade Counties. While some of the jobs are lower paying jobs, such as those classified as “other airport operations”, jobs such as aircraft engine and engine parts manufacturing pay well at an average annual wage of \$67,945 in Miami-Dade County and \$112,573 in Broward County.

Aviation, Aerospace and Defense	Broward County				Miami-Dade County				Monroe County			
	Current		5 Year History		Current		5 Year History					
	Employees	Avg Annual Wages	Employment Change	Annual % Change	Employees	Avg Annual Wages	Employment Change	Annual % Change	Employees	Avg Annual Wages	Employment Change	Annual % Change
Air Traffic Control	102	\$112,563	2	0.4%	171	\$93,085	-21	-2.2%	5	\$51,552	n/a	n/a
Other Airport Operations	850	\$24,045	-209	-4.3%	3,499	\$37,475	-181		169	\$26,170	168	2.14.3%
Other Support Activities for Air Transportation	1,672	\$59,312	143	1.8%	4,497	\$57,892	776	3.9%	30	\$68,819	-12	-6.3%
Aircraft Manufacturing	28	\$95,065	-126	-28.9%	114	\$63,255	-13	-2.2%	1	\$65,752	0	n/a
Aircraft Engine and Engine Parts Manufacturing	690	\$112,573	108	3.4%	886	\$67,945	271	7.6%	0	\$0	0	0.0%
Other Aircraft Parts and Auxiliary Equipment Manufacturing	322	\$73,221	-68	-3.7%	652	\$67,802	152	5.5%	652	\$59,526	152	5.5%
National Security	94	\$94,776	23	5.9%	1,192	\$89,219	61	1.1%	317	\$99,320	-39	-2.3%

Source: JobsEq

There are more than 6,000 jobs classified as “other support activities for air transportation” between Broward and Miami-Dade Counties, which offer average annual wages of \$59,312 and \$57,892 respectively. These support activities for air transportation have a significantly high location quotient of 3.49 indicating that this is an area with a concentration of nearly 3.5 times the national average. Nonscheduled chartered passenger air transportation is also a unique specialty throughout the region with a location quotient of 4.62.

Aviation is an important industry to the South Florida region as it is a critical component to the hospitality and tourism cluster, but its presence goes beyond the simple task of transporting travelers. The region has grown a sizeable number of jobs within aircraft engine and parts manufacturing and support activities to support the industry. Many of the jobs within this sector represent an opportunity for well-paid employment.

Defense

The defense economy in Southeast Florida includes annual direct spending of \$5.2 billion, total economic impacts of \$16.1 billion to the Gross Regional Product and 155,000+ jobs. It ranks #4 in the state in economic impact and jobs and is the fastest growing region in the state in both these metrics. South Florida’s military history dates back nearly 200 years to 1823 when the U.S. Navy established a naval base and presence in Key West to stop piracy in the area. The modern military footprint dates back to World War II when the region had numerous locations dedicated for military training. Throughout the Cold War South Florida installations were on the front lines protecting the interests of the United States. Today, these Commands are the bulwark that protects the southern approaches to the United States while enabling the military to project power around the globe.

The South Florida region is home to more than 30 commands, including: the U.S. Southern Command (SOUTHCOM), Marine Forces South (MARFORSOUTH), Special Force South (SOCSOUTH), Joint Interagency Task Force South (JIATF-S), Homestead Air Reserve Base (HARB), Naval Air Station Key West (NAS-KW), the 482 Fighter Wing, Navy aggressor squadrons, and Army Special Forces Underwater Operations School to highlight a few. There are at least six Coast Guard Stations in South Florida plus an additional 15 Coast Guard related offices.⁹¹

Defense test and training ranges include the South Florida Ocean Measurement Facility (SFOMF), Tactical Combat Training System, and multiple test and training range areas around Key West. The National Guard maintains a robust presence in the region including an alert detachment of fighters as the southernmost NOBLE EAGLE air defense alert in the United States. Several non-DoD components, including the U.S. Coast Guard footprint in the region, are one of the most robust in



the United States including District 7 (D7) Headquarters, Base Miami Beach, Air Station Miami, Sector Miami, Sector Key West, six Stations, 17 Cutters, and multiple other support commands. Several of these Coast Guard commands are co-located with key Department of Defense installations as well as Customs and Border Patrol (CBP) aviation assets at the Homestead Air Reserve Base (HARB).



The SFRPC, and its consultant team Jacobs Engineering and the South Florida Defense Alliance, in partnership with the Department of Defense Office of Local Defense Community Cooperation and local military leadership is conducting a regional

Military Installation Resilience Review (MIRR) of Homestead Air Reserve Base (HARB), U.S. Army Garrison-Miami (USAG-Miami), U.S. Naval Surface War Center South Florida Ocean Measurement Facility (SFOMF), and U.S. Naval Air Station Key West (NASKW).

The purpose of the MIRR is to identify the risks, hazards, and vulnerabilities of concern as it relates to the ability of the military to carry out its missions that can be mitigated through investments and solutions outside the fence line. Through this effort the resilience of these military installations will be enhanced to protect against encroachment, realignment, or action pursuant to Base Realignment and Closure. Initial meetings with military command personnel indicates that the lack of affordable housing, sea level rise, and weather changes are among the top resilience issues facing the military in South Florida.

National Security	Current		5 Year History	
	Employees	Avg Annual Wages	Employment Change	Annual % Change
Broward County	853	\$92,176	-118	-2.6%
Miami-Dade County	2,897	\$37,219	871	7.4%
Monroe County	3,954	\$37,205	535	3.0%

Source: Jobs EQ

Banking & Financial Services

South Florida has become a hub of International Banking Facilities providing services to local and foreign residents and institutions. South Florida continues to grow as a domestic and international Banking Services destination. Firms like Goldman Sachs, Tiger Global Management, and D1 Capital Partners have all announced plans to move offices and executives to Florida’s “Wall Street South”.⁹² Continued migration of financial firms to South Florida is not reflected in currently available LQ data.

Today, the Miami MSA is the second largest international banking center in the U.S., second only to New York.⁹³ Florida’s proximity to Central and South American markets, its multi-lingual population, and the State’s passage of catalyzing legislation as international banking and finance emerged have all contributed to Miami’s emergence as an international banking center.⁹⁴ Additionally, Florida has incentivized International Banking Facilities by exempting them from state income tax and allowing these institutions to deduct their losses.⁹⁵

As the region’s presence in international banking has grown, so have the jobs associated with the industry. Today, alongside bankers there are a range of firms and jobs within the professional services that specialize in global finance.

Businesses, such as those focused on international tax practices have matured from fledgling companies to regional businesses with multiple locations. They have also been joined by multinational corporations transacting cross-border business.⁹⁶ Given the ripe climate for international banking, it is not shocking that the region has a location quotient of 11.05 in international trade financing demonstrates the region’s unique and leading presence in this area.

In addition to the region’s reputation as a center for international banking, it also has a strong presence in domestic banking and financial services. Many of these jobs are paid extremely well with numerous jobs showing six figure average annual wages and many of these areas showing significant employment growth over the past five years. Commercial banking is a large source of employment for the region with approximately 16,000 jobs between Broward and Miami-Dade Counties.

Credit card issuing is a novel area for the Broward County, employing nearly 3,300 people with average annual wages of \$79,262 and showing a location quotient of 3.41. Banking and finance are industries that employ many people in well paid positions throughout South Florida.

The South Florida Business Journal reports that South Florida is becoming the “Wall Street of the South” with financial firms, predominantly from the Northeast and California, relocating to Florida for its warm weather, thriving business community, and tax-friendly policies with Miami-Dade County’s Brickell Financial District the banking destination of choice.⁹⁷

Banking & Finance	Broward County				Miami-Dade County			
	Current		5 Year History		Current		5 Year History	
	Employees	Avg Annual Wages	Employment Change	Annual % Change	Employees	Avg Annual Wages	Employment Change	Annual % Change
Securities Brokerage	1,770	\$212,301	-190	-2.0%	2,859	\$313,411	-74	-0.5%
Investment Advice	1,077	\$155,815	84	1.6%	1,888	\$187,242	330	3.9%
Commercial Banking	4,375	\$93,357	-510	-2.2%	11,631	\$104,140	-532	-0.9%
Credit Card Issuing	3,299	\$79,262	-494	-2.8%	69	\$116,707	-21	-5.2%
Real Estate Credit	982	\$150,413	389	10.6%	2,213	\$166,169	593	6.4%
All Other Non-depository Credit Intermediation	916	\$105,722	287	7.8%	614	\$68,300	63	2.2%
Portfolio Management	702	\$160,219	208	7.3%	1,832	\$277,647	629	8.8%
Financial Transactions Processing, Reserve, and Clearinghouse Activities	556	\$113,798	-316	-8.6%	1,911	\$126,807	175	1.9%
Other Activities Related to Credit Intermediation	446	\$74,706	-276	-9.2%	593	\$107,518	159	6.5%
Mortgage and Nonmortgage Loan Brokers	1,337	\$147,579	599	12.6%	935	\$136,752	92	2.1%

Source: Jobs EQ

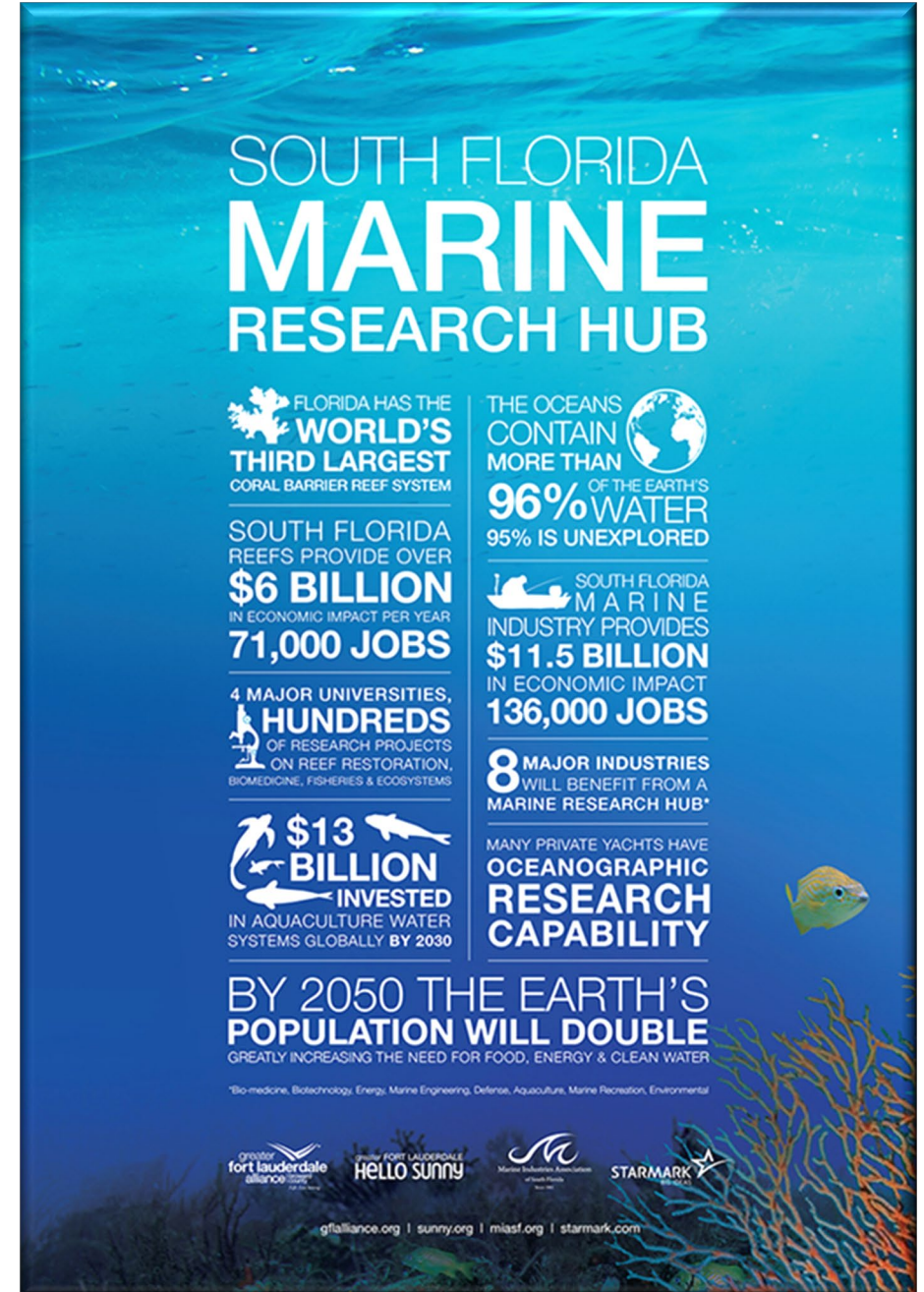
The Blue Economy

Related to the Marine and Tourism Industries is “the Blue Economy” otherwise referred to as the Global Ocean Economy. The Blue Economy is the sustainable use of ocean resources for economic growth, improved livelihoods and jobs, and ocean ecosystem health. The Blue Economy includes a range of activities including maritime transport, fisheries, tourism, renewable energy, climate change and waste management.⁹⁸

The global ocean economy is projected to reach \$3 trillion by 2030, according to the Organization for Economic Co-operation and Development (OECD).⁹⁹ In South Florida it is estimated that 23,251 businesses are within the Blue Economy, supporting 521,441 jobs and \$16.5 billion in wages. Supporting the efforts of the Blue Economy, The Marine Research Hub (MRH) was formed in 2017 to raise the visibility, reputation, and prestige of Florida’s oceanographic research institutions and facilitate university research and the transfer of technology into marketable goods and services including biomedical and energy advances. A true regional collaboration, the founding members of the Marine Research Hub include Florida Atlantic University, Florida International University, Nova Southeastern University, University of Miami, Business Development Board of Palm Beach County, Greater Fort Lauderdale Alliance, Miami-Dade Beacon Council, and Marine Industries Association of South Florida. South Florida leads the Nation in University-based marine research due in part to its year-round temperate climate and proximity to Florida’s Coral Reef, the only living barrier coral reef system in the United States.

In October 2019, Fort Lauderdale hosted the 9th Annual Ocean Exchange, which featured twelve innovative, sustainable worldwide solutions that demonstrated the ability to generate economic growth and increase productivity while reducing the use of nature’s resources. During the 2022 Florida legislative session, the Marine Research Hub

secured \$300,000 to promote and expand the Blue Economy in Florida.¹⁰⁰



**SOUTH FLORIDA
MARINE
RESEARCH HUB**

FLORIDA HAS THE **WORLD'S THIRD LARGEST** CORAL BARRIER REEF SYSTEM

THE OCEANS CONTAIN MORE THAN **96%** OF THE EARTH'S **WATER** 95% IS UNEXPLORED

SOUTH FLORIDA REEFS PROVIDE OVER **\$6 BILLION** IN ECONOMIC IMPACT PER YEAR **71,000 JOBS**

4 MAJOR UNIVERSITIES, **HUNDREDS** OF RESEARCH PROJECTS ON REEF RESTORATION, BIOMEDICINE, FISHERIES & ECOSYSTEMS

\$13 BILLION INVESTED IN AQUACULTURE WATER SYSTEMS GLOBALLY BY 2030

8 MAJOR INDUSTRIES WILL BENEFIT FROM A MARINE RESEARCH HUB*

MANY PRIVATE YACHTS HAVE **OCEANOGRAPHIC RESEARCH CAPABILITY**

BY 2050 THE EARTH'S POPULATION WILL DOUBLE
GREATLY INCREASING THE NEED FOR FOOD, ENERGY & CLEAN WATER

*Bio-medicine, Biotechnology, Energy, Marine Engineering, Defense, Aquaculture, Marine Recreation, Environmental

Greater Fort Lauderdale Alliance | Hello Sunny | Marine Industries Association of South Florida | STARMARK

gfalliance.org | sunny.org | miast.org | starmark.com

Focused on solving environmental and climate change related problems, the Blue Economy draws entrepreneurs with new profitable ideas and solutions to grapple with these issues. The race to see which region will become the hub of blue tech is still happening. Although Boston and San Diego are both home to major ocean research institutes and have strong emerging blue tech ecosystems, South Florida still has the potential to become synonymous with blue tech. Government regulations and access to capital remain hurdles for blue tech entrepreneurs. In some cases, regulations intended to protect the ocean from pollution are also preventing startups from deploying technology prototypes for testing. Additionally, start-up investors are often reluctant to fund early-stage climate startups due to the need for “patient capital”, as it can take years for a technology to become profitable.

Seeing the need to nurture these ventures, Endeavor Miami launched its first start-up accelerator program focused on scaling clean and climate tech companies. Advances in biotech, medical, and energy creation, including the harnessing of tidal energy, places South Florida in the forefront of this growing sector.

Creative Media, Design, & the Arts

South Florida is known for its fashion, art, music, and design. Its creative culture has been an asset for growing businesses in film, architecture, engineering, fashion, advertising, public relations, software development and other creative arts. Jobs, particularly those involved with digital media including software publishers, internet publishing, data processing and hosting, computer programming and computer system design services all pay more than \$100,000 a year. Many of these jobs are growing. Miami-Dade County had a 24.3% increase in the number of software publishers employed over the course of the past 5 years. Internet publishing, data processing and custom computer programming services all saw increases of 8% or

greater as well in Miami-Dade. In Broward County, internet publishing had nearly a 6% increase, custom computer programming approximately 7%, and computer systems design services had an almost 8% increase.

Within Creative Media and Design, film has been a burgeoning industry for South Florida. Most recently there were approximately 2,800 people working in motion picture and video production. Previously, Florida ranked # 3 in the country for film production until 2016 when the State discontinued its incentive program prompting a mass exodus.

In recent years, the industry has remained relatively stable with a slight decline in Miami-Dade and 3.7% growth in Broward County. Jobs within motion picture and video production pay well with a statewide average annual wage surpassing \$90,000. Both counties have launched their own local incentive programs to lure back the film industry.

Efforts to attract more the film and television industry to Broward County accelerated with the creation of the County’s Film Commission. Working in partnership with Broward County, the City of Fort Lauderdale recently announced that the City of Fort Lauderdale is scheduled to be home to one of the largest sound stages in the country. The 350,000 square foot state-of-the-art movie studio is scheduled to be fully built by 2025 on a former superfund site. This project is expected to create more than 10,000 highly-paid jobs over the next few years.

The Arts and Cultural sector of the economy continues to distinguish our region as one of the fastest growing and most diverse cultural centers in the nation. Hundreds of nonprofit arts organizations and thousands of artists/entrepreneurs are presenting and creating exhibitions, performances and events that are expanding the image of South Florida. Now we are being increasingly viewed as the “sophisticated subtropics.” This cultural life is providing South Florida

with the competitive edge for attracting businesses, tourism, and a skilled workforce all of whom consider the attractiveness of a vibrant cultural life when making decisions about where to live, work, visit, and raise a family.

South Florida theaters, museums, arts centers, and artists are among the most diverse and innovative in the hemisphere, reflecting the myriad cultural heritages and artistic traditions that now comprise our population. The creation of new artistic work with a South Florida voice is putting our region on the international cultural map as a leader in creativity for the 21st century.

The arts are not only invaluable as a regional business asset, but they also are helping to improve neighborhoods and change lives for the better through the revitalizing impact of pioneering arts organizations and artists.



Miami City Ballet, 2022. Jennifer Lauren and Renan Cerdeiro. Romeo and Juliet. Vizcaya Museum and Gardens. Photo by Gary James.

As an example, in Miami-Dade County alone, neighborhoods like Wynwood, Allapattah, Liberty City, Doral and Little River are experiencing an economic and social renewal through catalytic arts initiatives. Artists and nonprofit arts organizations are helping to create a region where differences are shared and celebrated forging a sense of pride of place.

Numerous county and municipal Cultural & Performing Arts Centers and Theatres have elevated South Florida to one of the top regions for the Cultural Arts. These centers include the Adrienne Arsht Center for the Performing Arts of Miami-Dade County and the Broward Center for the Performing Arts. The Arsht Center is the home stage for three resident companies - Florida Grand Opera, Miami City Ballet, and the New World Symphony.



Source: <https://www.arshtcenter.org/plan-your-visit/faqs/>



Source: <https://www.browardcenter.org/about>

Ranking among the top ten-most visited theaters in the world, The Broward Center for the Performing Arts presents more than 700 performances each year to more than 700,00 patrons.¹⁰¹

The arts are essential to a well-rounded education, providing children with creative problem-solving skills, training in teamwork, and the discipline necessary to succeed once they enter the 21st century workforce in any job or profession. The nonprofit arts industry, including museums, theaters, festivals, and arts centers, continues to generate significant jobs and impact on the economy in South Florida. A 2015 Arts & Economic Prosperity Study for this sector documented 40,944 full-time jobs in Miami-Dade, 11,078 jobs in Broward and 2,193 in Monroe. The total impact on the South Florida economy was \$1,929,811,931.¹⁰²

The intersection of the Creative Media, Design, & the Arts sector with the Hospitality & Tourism sector, particularly given the demand for entertainment, technicians, and activities staff to support South Florida’s cruise industry provides a unique opportunity for South Florida to host practice facilities for cruise entertainment staff. South Florida’s Economic Development professionals market a vibrant cultural arts environment to CEOs considering business expansion and headquarter relocation to South Florida.

Creative Media, Design, & the Arts	Broward County				Miami-Dade County			
	Current		5 Year History		Current		5 Year History	
	Employees	Avg Annual Wages	Employment Change	Annual % Change	Employees	Avg Annual Wages	Employment Change	Annual % Change
Software Publishers	3,605	\$207,391	482	2.9%	2,168	\$91,330	1,437	24.3%
Internet Publishing and Broadcasting and Web Search Portals	898	\$86,314	221	5.8%	1,302	\$134,021	422	8.1%
Data Processing, Hosting, and Related Services	4,274	\$115,453	183	0.9%	1,631	\$187,708	522	8.0%
Motion Picture and Video Production	1,212	\$88,061	203	3.7%	1,631	\$85,317	-105	-1.2%
Tele production and Other Postproduction Services	56	\$33,033	10	3.8%	244	\$62,977	48	4.5%
Graphic Design Services	700	\$51,665	-113	-3.0%	995	\$53,763	-2	0.0%
Other Specialized Design Services	146	\$53,075	22	3.4%	278	\$56,065	19	1.4%
Custom Computer Programming Services	5,449	\$115,679	1,551	6.9%	4,545	\$109,014	1,499	8.3%
Computer Systems Design Services	4,158	\$105,143	1,427	8.8%	4,434	\$130,171	623	3.1%

Source: Jobs EQ

Global Logistics

Port Everglades and PortMiami are some of the busiest ports in the country. In fact, Port Miami was recently ranked the 10th busiest port in the U.S.¹⁰³ Port Everglades sees similar volumes of cargo as PortMiami, with even slightly higher volumes of Twenty-foot Equivalent Units (TEU) in 2016, 2017 and 2018. In 2019, Port Everglades was named the 12th busiest port in the country.¹⁰⁴

Both ports are able to accommodate large ships with deep water berths and offer a nexus of intermodal options once containers arrive by ship. PortMiami and Port Everglades are able to reach 70% of the U.S. population within 4 days via the Florida East Coast on dock intermodal rail.¹⁰⁵ Port Everglades in Broward County serves 100% of the petroleum product needs of Miami-Dade, Broward, Palm Beach, and Martin counties with a distribution area that incorporates eight additional counties.¹⁰⁶

Miami International Airport (MIA) and Fort Lauderdale-Hollywood International Airport (FLL) are major assets for the global logistics industry. MIA sees millions of tons of cargo pass through its grounds annually. While FLL sees significantly less air cargo than MIA, FLL has seen sizeable growth with a 19.5% increase in the volume of air freight from 2020 to 2021. MIA also saw tremendous growth from 2020 to 2021 with an approximately 18% increase.

With major facilities to support logistics, Port Everglades and FLL Airport located in Broward County and Port Miami and MIA Airport located in Miami-Dade County, the jobs associated with logistics are dominant in these counties. There are few jobs related to logistics in Monroe County. Many of the jobs within the global logistics industry pay well with average annual wages of more than \$45,000. Warehousing and storage jobs have seen tremendous growth with an

increase of 9.8% in Broward County and nearly new 2,000 jobs and an increase of 37.8% in Miami-Dade County and nearly 11,000 new jobs in the region. There is a significant difference in the average annual ages recorded between the two counties.



Courtesy of Port Everglades

With major facilities to support logistics, Port Everglades and FLL Airport located in Broward County and Port Miami and MIA Airport located in Miami-Dade County, the jobs associated with logistics are dominant in these counties. There are few jobs related to logistics in Monroe County. Many of the jobs within the global logistics industry pay well with average annual wages of more than \$45,000. Warehousing and storage jobs have seen tremendous growth with an increase of 9.8% in Broward County and nearly new 2,000 jobs and an increase of 37.8% in Miami-Dade County and nearly 11,000 new jobs in this area. Total cargo volume at Port Everglades was 24.3 million tons and 11.1 million tons at the Port of Miami in 2021.

Historical Rates of Container Shipments in TEUs						
	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021
Miami-Dade	1,037,226	1,076,912	1,108,465	1,053,078	945,512	1,038,179
Broward	1,028,156	1,020,192	1,083,586	1,120,913	1,066,738	1,254,062

Source: Port Everglades, <https://www.porteverglades.net/cargo/containerized> and Port Miami, <https://www.miamidade.gov/portmiami/cargo.asp>

Annual Air Freight Cargo in US Tons					
	2021	2020	2019	2018	2017
FLL	110,049	92,121	114,301	118,494	107,325
MIA	2,746,899	2,327,747	2,270,365	2,305,941	2,245,190

Source: Fort Lauderdale-Hollywood International Airport and Miami International Airport Monthly Statistical Summaries

Global Logistics	Broward County				Miami-Dade County			
	Current		5 Year History		Current		5 Year History	
	Employees	Avg Annual Wages	Employment Change	Annual % Change	Employees	Avg Annual Wages	Employment Change	Annual % Change
Deep Sea Freight Transportation	252	\$76,686	-74	-5.0%	823	\$80,481	-114	-2.6%
Coastal and Great Lakes Freight Transportation	435	\$94,092	119	6.6%	73	\$51,891	-49	-9.8%
General Freight Trucking, Local	1,115	\$45,973	91	1.7%	4,408	\$41,370	706	3.6%
General Freight Trucking, Long-Distance, Truckload	1,356	\$46,390	412	7.5%	3,854	\$46,669	707	4.1%
General Freight Trucking, Long-Distance, Less Than Truckload	788	\$62,430	91	2.5%	1,749	\$63,645	-57	-0.6%
Specialized Freight (except Used Goods) Trucking, Local	702	\$58,961	90	2.8%	934	\$50,807	138	3.2%
Specialized Freight (except Used Goods) Trucking, Long-Distance	187	\$54,933	-84	-7.2%	329	\$50,866	-187	-8.6%
Marine Cargo Handling	574	\$61,839	-18	-0.6%	2,217	\$56,259	-851	-6.3%
Freight Transportation Arrangement	1,855	\$60,575	241	2.8%	10,791	\$50,304	10	0.0%
General Warehousing and Storage	5,371	\$51,400	1,998	9.8%	13,609	\$33,843	10,869	37.8%

Source: Jobs EQ

Life Sciences & Healthcare

Life Sciences

The life sciences industry includes organizations that perform research, development and manufacturing of pharmaceuticals, biotechnology-based food and medicines, medical devices, biomedical technologies, nutraceuticals, cosmeceuticals, food processing as well as other products that improve health. South Florida is home to approximately 1,500 bioscience businesses and institutions that generate over \$4 billion in sales, employing nearly 13,000 life sciences workers in South Florida.¹⁰⁷ The region possesses five universities that offer life science master's degrees and four universities that offer life science doctorates.



Courtesy of Life Sciences South Florida

Sciences South Florida is a collaborative of the region's academic institutions, research parks and economic development organizations with the goal of both public and private investment opportunities. Additionally, the collaborative aids with the sharing of specialized equipment and provides a forum for guiding biotech workforce development. The region also benefits from membership in BioFlorida, the voice of Florida's life sciences industry as well as the Florida Institute for the Commercialization of Public Research, which cultivates technology transfer at Florida's public universities.

The region possesses several other biotech incubators, including the Center for Collaborative Research at Nova Southeastern University at Davie which features wet and dry laboratory space as well as access to specialized core facilities related to genomics, flow cytometry, cell therapy and imaging. Converge Miami, a partnership between Wexford Science and Technology and the University of Miami offers an urban research campus with lab space, office and coworking space in the heart of the Miami Health District. The facilities are important infrastructure for supporting the growth and development of life science-based companies.

The Life Sciences industry has seen both high rates of growth as well as areas of job loss. The loss of 1,091 jobs in electromedical and electrotherapeutic apparatus manufacturing in Miami-Dade County is significant. However, many other areas of manufacturing have seen sizeable increases. There has been a nearly 72% increase in in-vitro diagnostic substance manufacturing in Broward County as well as a nearly 30% increase in the jobs pertaining to R&D in Nanotechnology in Miami-Dade County.

Manufacturing jobs within the life sciences represent advanced manufacturing employment opportunities requiring highly specialized skills and higher rates of pay than traditional manufacturing.

Healthcare

Broward County's healthcare industry cluster is comprised of both the healthcare and the biosciences industries. Careers in this industry sector include pharmaceutical preparation manufacturing, surgical and medical instrument manufacturing, physicians, dentists, outpatient care centers operations, home health aides and more. Nationally, the employment of healthcare occupations is projected to grow 19 percent from 2014 to 2024. Healthcare-related occupations are expected to add more jobs than any other group of occupations. This growth is expected due to an aging population, as well as an increase of individuals who have gained access to health insurance.¹⁰⁸

Since the 1950s, Miami-Dade's entrepreneurial climate has nurtured successful biomedical, medical device and pharmaceutical companies. Today, Miami-Dade is home to industry leaders such as Beckman Coulter, BD Biosciences, Cordis (a Johnson & Johnson Company) and Merck. A major new asset for the region is the University of Miami's Life Science Park, a catalyst that will bring faculty, scientists, students, and entrepreneurs together to encourage collaboration and innovation. Located in Miami's Health District, which includes the University's Miller School of Medicine, six hospitals and numerous specialty care centers, the park will eventually encompass up to 2 million square feet dedicated to supporting this sector. Florida International University's College of Medicine and Biomedical Engineering program, as well as Miami Dade College's life science education programs contribute to the region's workforce and research capabilities.¹⁰⁹

Nova Southeastern University in Broward County has a Health Professions Division that is leading the university and region to new levels of excellence. The division boasts eight colleges – allopathic medicine, osteopathic medicine, pharmacy, optometry, medical sciences, dental medicine, health care sciences, and nursing – and more than 60 degree and certificate programs.

The Alan B. Levan | NSU Broward Center of Innovation, is a public-private partnership between Nova Southeastern University and Broward County acting as an economic and education development engine linking the South Florida Innovation ecosystem. The Center is works closely with its research partners, particularly in Life Sciences & Healthcare and the Blue Economy, to commercialize their discoveries and support new business development and investment.



Nova Southeastern University, Broward County

Life Sciences	Broward County				Miami-Dade County			
	Current		5 Year History		Current		5 Year History	
	Employees	Avg Annual Wages	Employment Change	Annual % Change	Employees	Avg Annual Wages	Employment Change	Annual % Change
Medicinal and Botanical Manufacturing	354	\$47,470	166	13.5%	337	\$43,735	310	66.0%
Pharmaceutical Preparation Manufacturing	1,648	\$65,251	554	8.5%	1,013	\$72,304	73	1.5%
In-Vitro Diagnostic Substance Manufacturing	415	\$83,035	387	71.6%	23	\$60,225	4	3.8%
Electromedical and Electrotherapeutic Apparatus Manufacturing	41	\$69,842	30	30.0%	360	\$109,251	-1,091	-24.3%
Surgical and Medical Instrument Manufacturing	622	\$68,520	126	4.6%	615	\$134,781	-113	-3.3%
Surgical Appliance and Supplies Manufacturing	1,445	\$45,031	251	3.9%	298	\$57,322	120	10.9%
Dental Equipment and Supplies Manufacturing	43	\$54,165	-10	-4.3%	131	\$82,859	66	15.1%
Dental Laboratories	317	\$42,172	-72	-4.0%	291	\$43,819	-59	-3.6%
Testing Laboratories	515	\$83,036	38	1.6%	490	\$61,103	141	7.0%
Research and Development in Nanotechnology	27	\$125,640	1	1.1%	166	\$101,047	121	29.9%
Research and Development in Biotechnology (except Nanobiotechnology)	328	\$169,652	110	8.5%	649	\$111,976	234	9.3%
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	506	\$101,731	0	0.0%	1,122	\$97,576	243	5.0%
Medical Laboratories	3,400	\$75,140	288	1.8%	1,503	\$62,498	307	4.7%
Diagnostic Imaging Centers	707	\$59,850	-86	-2.3%	1,414	\$48,821	325	5.4%
Blood and Organ Banks	476	\$54,354	232	14.3%	315	\$52,015	-66	-3.8%
Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	3,091	\$106,426	547	4.0%	3,450	\$100,970	1,032	7.4%
Drugs and Druggists' Sundries Merchant Wholesalers	3,306	\$105,356	7	0.0%	3,034	\$75,673	-163	-1.0%

Source: Jobs EQ

Hospitality & Tourism

Hospitality and Tourism have been anchors of the South Florida economy dating back to the early 1900s, but after WWII the industry grew exponentially and quickly became the State's biggest source of income.¹¹⁰ Warm weather, beaches, and an expansive coral reef system – the only living coral barrier reef in the continental U.S. and third largest in the world – make it a top destination for travelers. Beyond its natural wonders, South Florida has developed a reputation as a cosmopolitan, cultural destination. The region offers unique culinary experiences, well known for its Latin and Caribbean influences with fresh seafood. Additionally, events such as Art Basel have elevated Miami's recognition as an arts and culture center and brought numerous people to South Florida in search of art. In 2018, more than 83,000 people attended Art Basel.¹¹¹ Festivals, conferences, and expos suffered greatly with the shutdown from the COVID-19 pandemic that occurred in 2020 and while many events have begun to return, attendance has been diminished and organizations have struggled.¹¹²

The cruise industry is a significant component of the hospitality and tourism cluster in South Florida. In fact, Port Miami and Port Everglades are two of three largest cruise ports in the World. Before the pandemic Port Miami welcomed 6.8 million cruise passengers¹¹³ and Port Everglades typically hosts nearly 4 million passengers annually.¹¹⁴ The port in Key West is the only cruise port to function solely as a port of call and contributes \$85 million in economic benefits, 1,250 local jobs, and 15% of the City's local tax revenue.¹¹⁵

South Florida is the region of choice for some of the largest cruise company headquarters in the world. Carnival, Royal Caribbean, and Norwegian Cruise Lines are based in Miami-Dade County with Broward County hosting Virgin Voyages and American Queen Voyages.

The pandemic devastated the cruise industry with no cruises occurring for approximately 15 months. It was not until the end of June 2021 that cruises resumed in Port Everglades and the beginning of July 2021 when Port Miami reinstated cruises. The strength and uniqueness of this industry is captured in its off the charts location quotient of 50.57 for deep sea passenger transportation, a score far exceeding any other industry within the hospitality and tourism sector, signifying the region's dominance in this area.



There is an abundance of jobs within the hospitality and tourism sector, but many of the jobs are low wage jobs. Among the three counties there are over 85,000 full-service restaurant jobs, but the average annual wages for these jobs is low ranging from \$31,569 to \$39,300. It is challenging for these workers to afford the high cost of living in South Florida. Some jobs within this industry, particularly those within deep sea passenger transportation (also known as the cruise industry) pay significantly more with average annual wages ranging from \$61,452 to \$104,854. There tri-county region showing more than 7,500 of jobs within this industry, with most of these jobs located in Miami-Dade County.

Hospitality & Tourism	Broward County				Miami-Dade County				Monroe County			
	Current		5 Year History		Current		5 Year History		Employees	Avg Annual Wages	Employment Change	Annual % Change
	Employees	Avg Annual Wages	Employment Change	Annual % Change	Employees	Avg Annual Wages	Employment Change	Annual % Change				
Deep Sea Passenger Transportation	323	\$61,452	62	4.3%	7,267	\$104,854	2,277	7.8%	24	\$77,315	24	107.0%
Coastal Passenger Transportation	92	\$59,217	28	7.7%	291	\$68,902	-2,815	-37.7%	2	\$30,773	-8	-26.6%
Scenic & Sightseeing Transportation, Water	294	\$42,543	2	0.1%	247	\$43,139	6	0.5%	420	\$41,233	82	4.5%
Scenic & Sightseeing Transportation, Land	25	\$20,626	-3	-2.4%	93	\$51,916	-49	-8.1%	87	\$33,766	-54	-9.3%
Casinos (except Casino Hotels)	1,127	\$54,961	-230	-3.6%	465	\$47,123	-310	-9.7%				
Snack & Nonalcoholic Beverage Bars	4,815	\$21,077	1,489	7.7%	4,579	\$23,069	1,114	5.7%	188	\$19,112	-21	-2.1%
Limited-Service Restaurants	22,406	\$19,573	-929	-0.8%	26,036	\$24,915	-2,155	-1.6%	879	\$29,923	-280	-5.4%
Full-Service Restaurants	33,683	\$31,569	-2,179	-1.2%	46,877	\$36,196	-3,085	-1.3%	5,148	\$39,300	-160	-0.6%
Drinking Places (Alcoholic Beverages)	2,472	\$30,287	-326	-2.4%	3,260	\$39,197	-456	-2.6%	771	\$36,376	-27	-0.7%
Casino Hotels	1,290	\$54,402	-2,146	-17.8%	5,288	\$57,689	5,287	506.7%	91	\$47,840	-13	-2.6%
Hotels (except Casino Hotels) and Motels	7,978	\$36,570	-3,745	-7.4%	20,952	\$45,289	-11,623	-8.4%	5,659	\$46,011	-459	-1.5%
Amusement and Theme Parks	170	\$17,633	118	26.8%	388	\$30,705	288	31.2%	11	\$24,434	-3	-5.1%
Museums	206	\$42,098	-79	-6.3%	697	\$44,774	105	3.3%	107	\$31,975	-26	-4.3%
Sports Teams and Clubs	529	\$194,041	-84	-2.9%	2,267	\$270,596	-222	-1.8%	14	\$115,926	3	4.9%
Convention and Visitors Bureaus	38	\$74,702	0	-0.2%	86	\$100,173	-36	-6.7%	3	\$34,385	0	3.1%
Tour Operators	176	\$68,506	46	6.3%	308	\$59,398	-265	-11.7%	20	\$22,875	-71	-26.4%
Travel Agencies	1,455	\$62,300	-1,061	-10.4%	1,690	\$62,300	-589	-5.8%	40	\$38,171	-33	-11.3%
Other Travel Arrangement & Reservation Svcs	1,018	\$66,660	94	2.0%	116	\$68,936	-2,028	-16.1%	34	\$51,629	-305	-36.7%



Christ of the Abyss, Key Largo



Vizcaya Museum & Gardens, City of Miami



Bill Baggs Cape Florida State Park



Carrie B Tours, Fort Lauderdale



Hemmingway House, Key West

Manufacturing

While South Florida’s manufacturing sector is not a top employer (only 3% of jobs among the tri-county region are within manufacturing), it is a major contributor of output and has strong linkages to other important industry sectors. For example, many of the advanced manufacturing jobs produce medical devices or aircraft engine parts bolstering the life sciences and aviation industries. Furthermore, manufacturing within these advanced industry sectors- those characterized by high levels of research & development technology and Science, Technology, Engineering & Math (STEM) workers- pay high wages. The average annual wage for an employee in medical and surgical instrument manufacturing is nearly \$135,000 in Miami-Dade County. A 2021 Study by the Florida Department of Economic Opportunity reports that employment in the manufacturing industry is concentrated in the southeast, central, and northeast parts of the state. In 2020, Miami-Dade manufacturing employment totaled over 41,000 jobs. Orange and Pinellas counties contributed over 30,000 jobs each, with Broward, Palm Beach, Hillsborough, Brevard, and Duval counties contributing over 20,000 jobs each. These seven counties accounted for 63.9% of Florida manufacturing jobs.¹¹⁶

Make It Miami, a report on South Florida’s manufacturing sector in 2019 found that most manufacturing employees earn above the median earnings for Miami-Dade County overall, and more than one-third of Miami’s manufacturing firms are within the advanced manufacturing industry sector. In the report, which included results from a manufacturing survey, it found that Miami manufacturers have a positive outlook and were pleased with their access to international markets and quality of life. However, most businesses perceived the cost of commercial and industrial sites, poor transportation infrastructure, the lack of an adequately educated workforce and the lack of business incentives to be negative factors. In fact, 46.1% have considered relocating.¹¹⁷

Marine Industries

The region’s location adjacent to the stunning Caribbean waters makes it a natural location for boating. The marine industries are tied to the hospitality and tourism cluster but also serve area residents. In 2022 The Discover Boating Miami International Boat Show generated more than \$955.6 million in economic impact throughout the state of Florida, created over 5,000 jobs, and with more than 100,000 visitors over the five-day event.

Similarly, the 2021 Fort Lauderdale International Boat Show, the largest in-water boat show in the world, contributed \$1.79 billion to Florida’s economy with \$899 million in direct sales over the 5 days of the show.¹¹⁸ The Island Boat Show in the Florida Keys, the “Sport Fishing Capital of the World”, also attracts national and international visitors. Fort Lauderdale is often referred to as “the Yachting Capital of the World” and/or “the Venice of the America’s” because of the large number of recreational boats and canals in Broward.



Fort Lauderdale Boat Show / Courtesy of the Greater Fort Lauderdale / Broward County Convention Center

The Marine Industries Association of South Florida reports the marine industries has a regional economic impact of \$12.5 billion with \$9.7 billion impact in Broward County. The Marine Industry Economic Cluster provides 149,000 jobs regionally with 121,000 middle class jobs in Broward County.¹¹⁹ The robust demand for purchasing boats through the region generates demand for parts, marinas, boat building, etc.

except for motor vehicles, has a concentration of 7.69 times greater than the national average. The marine industries are a unique industry in which South Florida has a strong presence. The wages for employees in these industries vary, but average annual wages, particularly for boat dealers, have generous salaries with average annual wages ranging from \$58,225 to \$120,493 depending on the county.

Marine Industries	Broward County				Miami-Dade County				Monroe County			
	Current		5 Year History		Current		5 Year History					
	Employees	Avg Annual Wages	Employment Change	Annual % Change	Employees	Avg Annual Wages	Employment Change	Annual % Change	Employees	Avg Annual Wages	Employment Change	Annual % Change
Boat Dealers	1,610	\$120,493	145	1.9%	614	\$73,831	84	3.0%	264	\$58,225	24	1.9%
Marinas	941	\$59,694	25	0.5%	518	\$54,420	-1	0.0%	392	\$41,166	32	1.7%
Boat Building	444	\$58,151	-50	-2.1%	1,375	\$53,111	508	9.7%	42	\$47,295	30	29.3%
Marinas	941	\$59,694	25	0.5%	518	\$54,420	-1	0.0%	392	\$41,166	32	1.7%

Source: Jobs EQ

Ports & Airports Infrastructure

The airports and seaports are critical components of the regional economy, supporting domestic and international trade. The South Florida region is served by three major international airports, an additional international airport in Marathon, and two major seaports. The Fort Lauderdale-Hollywood Airport (FLL) and the Miami International Airport (MIA) are the largest airports serving the Miami Metropolitan Area. Both airports welcome millions of international visitors per year. Much of the cargo entering the South Florida region is transported by sea through the Port of Miami and Port Everglades. The location quotient of 4.31 for boat dealers demonstrates the region as an industry that has a concentration of 4.31 times greater than the national average and the transportation equipment and supplies,

MIA receives 70% of all international passengers in Florida and is America’s third-busiest airport for international passengers. The airport offers more flights to Latin America and the Caribbean than any other U.S. airport. In 2019, MIA had nearly 46 million passengers and was the top U.S. airport for international freight. It is projected that by 2040, MIA will serve 77 million travelers and more than 4 million tons of freight. To accommodate the airport’s continued anticipated growth, the Miami-Dade County Commission adopted a new capital improvement program at MIA that will fund up to \$5 billion in airport-wide modernization projects. It is anticipated that the slate of projects over the course of the next 15 years.¹²⁰ Additionally, the Miami area has three smaller general aviation and executive airports. MIA and the county’s general aviation airport’s annual economic impact is \$33.7 billion, contributing 275,708 jobs directly and indirectly to the local economy.¹²¹ MIA alone handles 80.7 percent of all goods arriving to or

leaving from Florida, positioning itself among the most important airports in the country for air cargo. The airport specializes in handling perishable goods like fish, fruits, vegetables, and flowers, which represent almost three quarters of MIA's air cargo imports. MIA processes more cut flowers than any other airport in the U.S., accounting for about 85 percent of all flowers imported to the country. Broward County / Fort Lauderdale is unique in that its infrastructure features not only the Fort Lauderdale / Hollywood International Airport but also a deep-water seaport with short canals at Port Everglades with proximity to the Florida East Coast (FEC) and CSX railroads and I-95 making intermodal transportation a pillar of Broward County's economy.

Fort Lauderdale-Hollywood International Airport (FLL) is the fastest growing large hub airport in the United States. To accommodate its continued growth, FLL is undertaking a \$3.2 billion capital improvement program that includes 20 plus projects across four terminals focused on modernization in addition to 500,000 square feet of expansion and renovation across three terminals.¹²² The airport's location adjacent to Port Everglades makes it an important facility for business and cargo activity. FLL's annual economic impact is \$37.5 billion, contributing to almost 255,386 jobs directly and indirectly to the local economy.¹²³

Although the Miami-Dade County International Airport and Fort Lauderdale / Hollywood International Airport are only thirty miles apart, they are somewhat specialized in the different travel markets they serve. In part, Miami International Airport serves a greater number of international travelers who may be traveling to other final destinations in the United States. In contrast, the Fort Lauderdale / International Airport serves primarily as a destination airport for travelers visiting South Florida.



Miami-Dade County International Airport



Fort Lauderdale / Hollywood International Airport



Key West International Airport

Key West International Airport primarily supports commercial service users and the local tourism industry. The airport’s location makes it vital to serving the local community of Key West, which is one of Florida’s major tourist destinations. Monroe County has \$80 million project to build a concourse with jet bridges, which is anticipated to be complete in 2024. Monroe County is also home to Marathon airport, which operates mostly as a private and charter plane airport.¹²⁴

Opportunity Zones

An Opportunity Zone is an economically distressed community where private investments, under certain conditions, may be eligible for capital gain tax incentives. The South Florida region contains 98 Qualified Opportunity Zone Census Tracts, with 30 in Broward County, 67 in Miami-Dade County, and 1 in Monroe County. The Opportunity Zones were certified by the U.S. Department of the Treasury on June 14, 2018. Investors can defer tax payment on any prior gains invested in a Qualified Opportunity Fund (QOF) until the earlier of the date on which the investment in a QOF is sold or exchanged or until December 31, 2026.

Workforce Development is a major part of the Comprehensive Economic Development Strategy (CEDS) for South Florida. Workforce development is addressed in the Innovation and Competitiveness, Opportunity and Prosperity, and Economic Resilience Goals and Objectives of the CEDS action plan. Our analysis of the census tracts belonging to Qualified Opportunity Zones shows that there is greater poverty, lower educational attainment, and a greater reliance on transit in these areas than the state and regional averages. This revelation is consistent with findings in the 2018 ALICE (Asset Limited, Income Constrained, Employed) report for South Florida, which indicates many residents in low-income communities make the difficult choice between food, shelter, and transportation on a regular basis. The COVID-19 pandemic and subsequent closure of vast segments of the

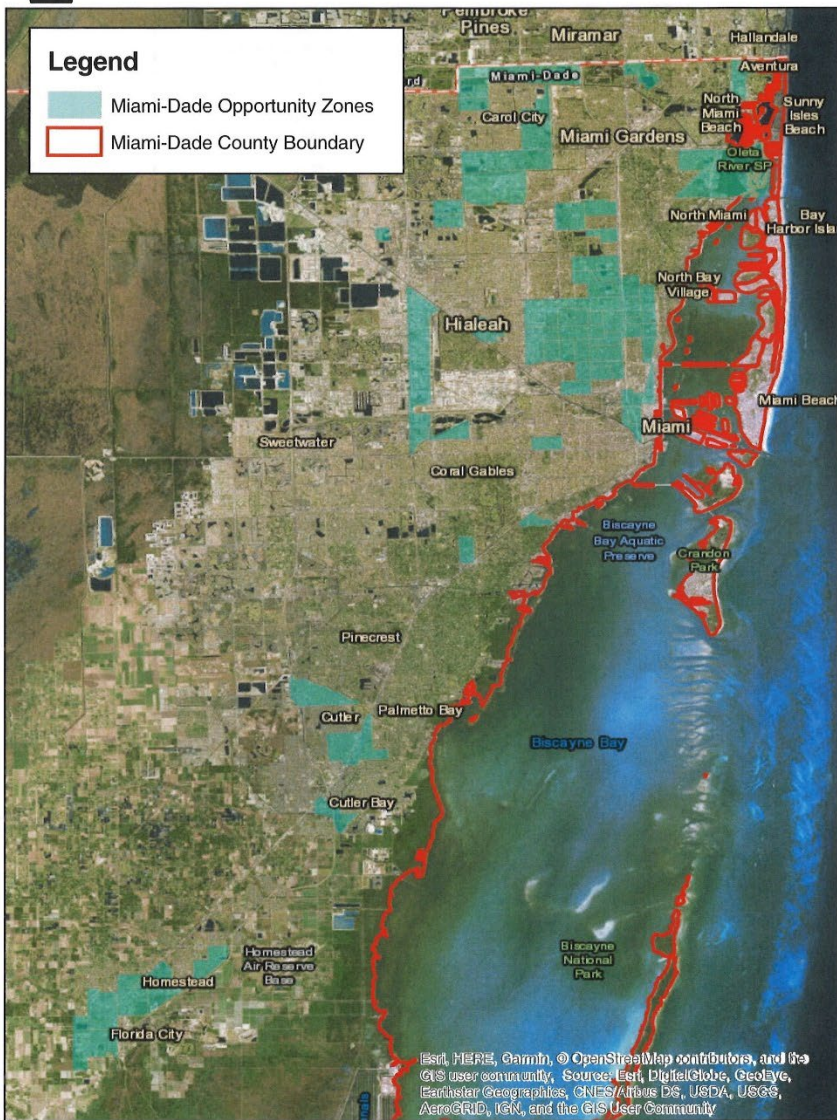
economy has further exacerbated economic hardship and elevated the importance of community and economic development, supply chain development and management, and diversification of the economy. Encouraging and supporting new businesses, job creation, and investment within Opportunity Zones is key to reversing negative trends and creating opportunity and a more positive future for Opportunity Zone residents and South Florida as a whole.



This map provides data collected from Florida Department of Economic Opportunity. The Opportunity Zones were certified by the U.S. Department of the Treasury on June 14, 2018.



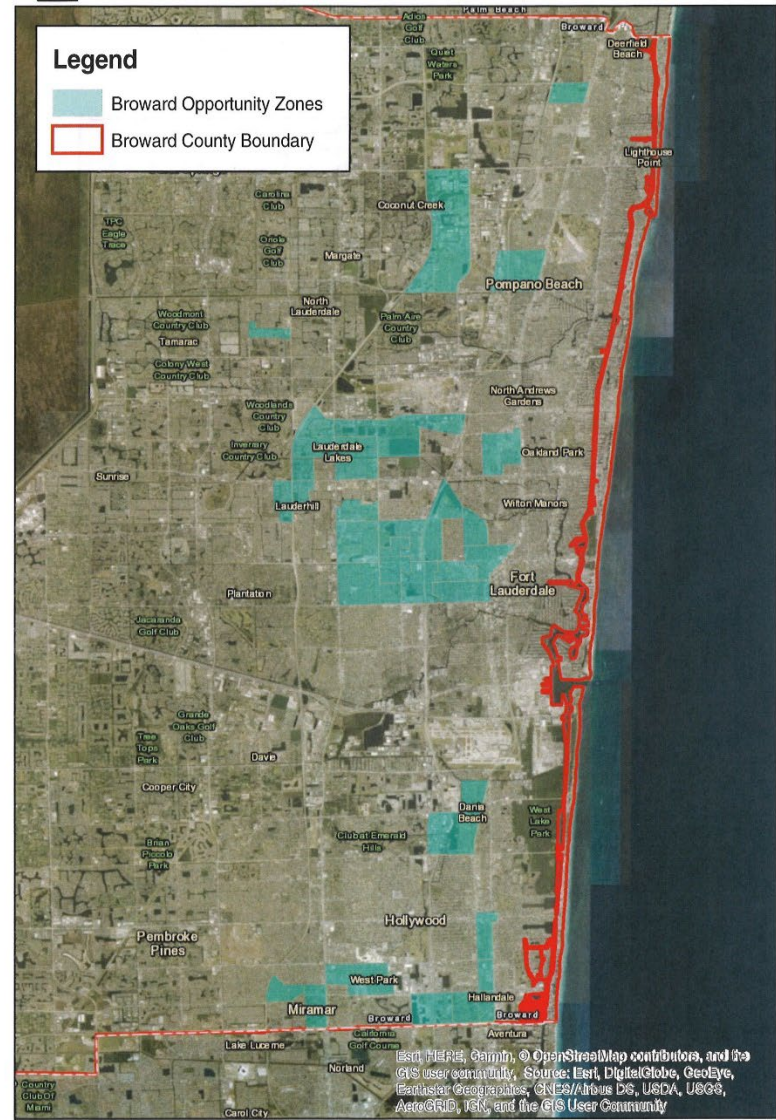
⊕ Opportunity Zones of Miami-Dade County



This map provides data collected from Florida Department of Economic Opportunity. The Opportunity Zones were certified by the U.S. Department of the Treasury on June 14, 2018.



⊕ Opportunity Zones of Broward County



This map provides data collected from Florida Department of Economic Opportunity. The Opportunity Zones were certified by the U.S. Department of the Treasury on June 14, 2018.

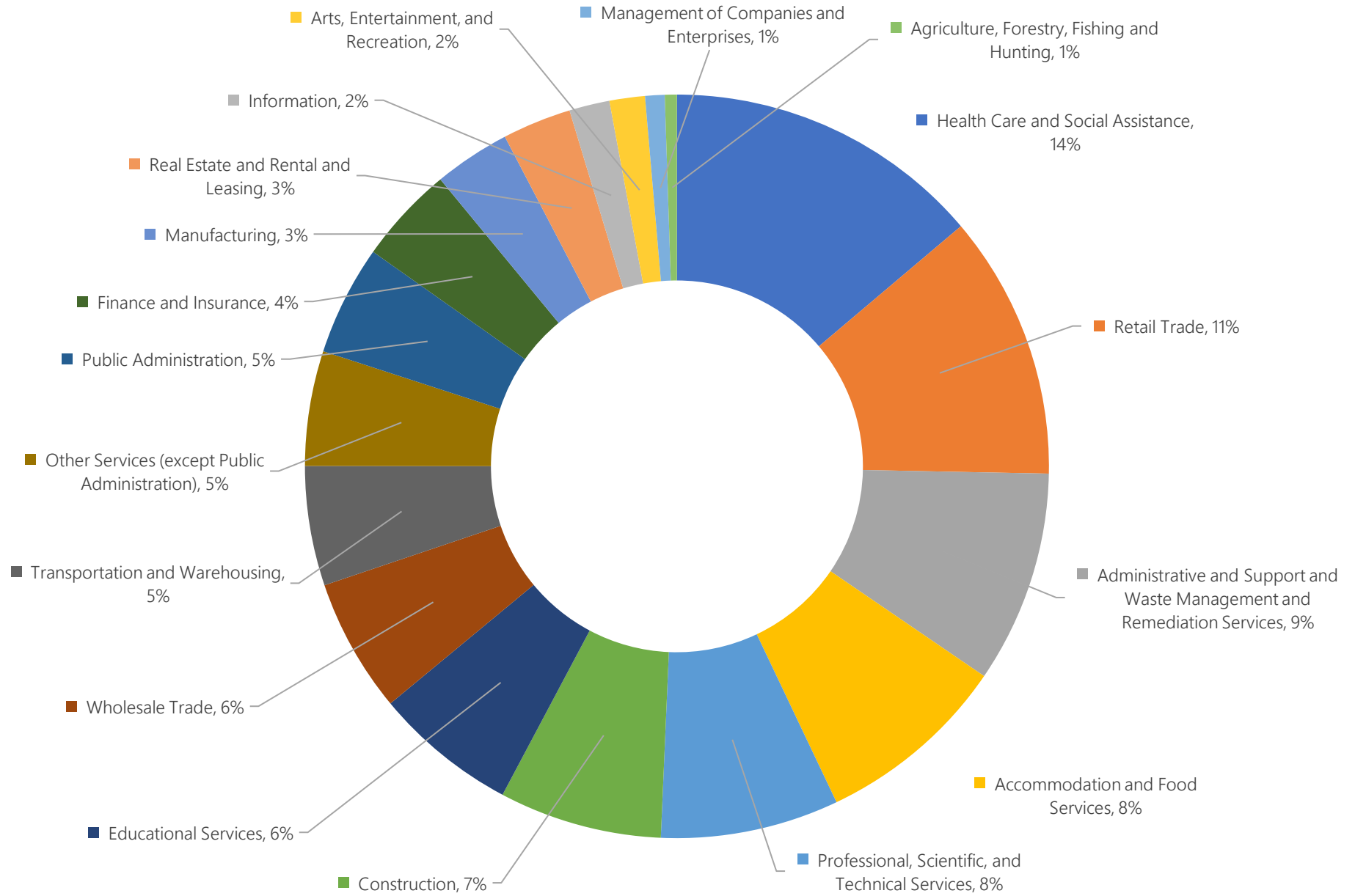


Target Clusters

This table shows industry clusters of focus in the 2017 CEDS and identifies new industry clusters and niche sectors based on their economic development significance and projected demand over the next five years.

2017 CEDS TARGET CLUSTERS	2022 CEDS TARGET CLUSTERS
HEALTHCARE & SOCIAL ASSISTANCE	HEALTHCARE & LIFE SCIENCES
MANUFACTURING	TRADITIONAL AND ADVANCED MANUFACTURING
SCIENCE & TECH	TECHNOLOGY
ARTS, ENTERTAINMENT, RECREATION	CREATIVE DESIGN/MEDIA
HOSPITALITY & TOURISM	HOSPITALITY & TOURISM
AGRICULTURE FORESTRY FISHING, HUNTING	AGRICULTURE FORESTRY FISHING, HUNTING
	BANKING & FINANCIAL SERVICES
	GLOBAL LOGISTICS
	MARINE INDUSTRIES
	BLUE ECONOMY/INDUSTRIES
	ADMINISTRATIVE, SUPPORT

South Florida Industries as a % of Jobs

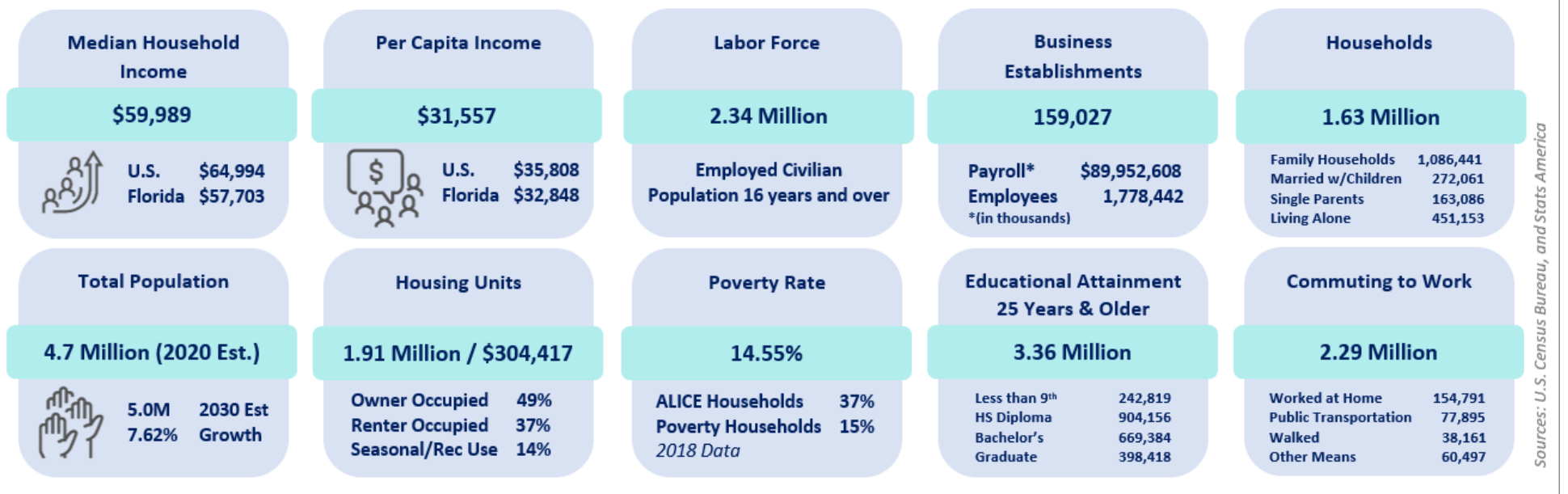


Evaluation Framework

The CEDS Evaluation Framework is a summary of key regional, state, and U.S. data points from the U.S. Census Bureau, American Community Survey (ACS), U.S. Bureau of Economic Analysis (BEA), and the U.S. Bureau of Labor Statistics.

These data metrics service as performance metrics in evaluating the progress of achieving the CEDS Goals and Objectives.

Goal: To Promote Innovation and Competitiveness; Opportunity, Equity, Prosperity; Vitality and Sustainability



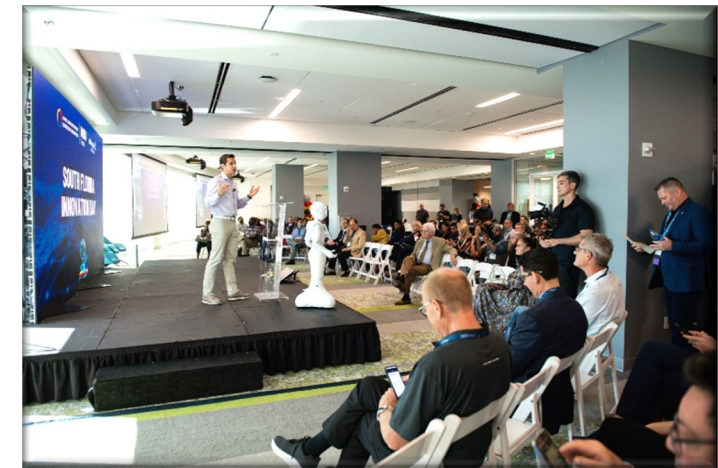
ADDITIONAL METRICS

- Growth in the county's workforce ages 24 – 44
- Demographics
- Gross Regional Product
- Average Annual Unemployment Rates
- Employment by Industry, Sector, Occupation
- Average Annual Wages by Industry
- Tourism Development Tax Collections
- Trade Imports / Exports
- Location Quotients
- Educational Attainment
 - High School Graduation Rates
 - Third Grade English Language Arts
 - Enrollment & Graduation Rates in Trade, Career, Technical, and Vocational Schools
- Innovation Index
- Number of Septic Tanks
- Median Housing Price
- Median Housing Rental Cost
- Percent of Persons Living in Poverty
- ALICE (Asset-Limited, Income-Constrained, but Employed) Population
- ALICE Children and Children in Poverty
- Single Parent Households with Children

COMMUNITY PARTICIPATION & ACKNOWLEDGEMENTS

The CEDS Strategy Committee consists of the region's top public, private, and nonprofit CEOs representing economic development organizations, chambers of commerce, educational institutions, employers, transit agencies, workforce training professionals, local businesses, local governments, and resilience officers among others. These leaders brought their expertise and insights to the critical focus areas of Economic Diversification, Business Attraction & Workforce Development, Mobility & Access, and Environment & Resilient Infrastructure.

Regional stakeholders played an integral role in the CEDS development and implementation process. September 2021 and September 2022, the SFRPC convened 18 hybrid / virtual and in-person meetings to collect input from the CEDS Strategy Committee, regional stakeholders, and the public; conducted a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis; discussed regional climate resilience and performance measures, and brainstormed goals and strategies to incorporate into the plan. More than 100 individuals participated in the CEDS development process through the CEDS Strategy Committee and topic area Work Groups.



Courtesy of Nova Southeastern University

The South Florida Regional Planning Council would like to thank the CEDS Strategy Committee and Work Group Members for their input and guidance for the 2022-2027 CEDS update.

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FUNDING RESOURCES

(Courtesy of the Emerald Coast Regional Council)

Funding will be a critical component to implement many of the goals and strategies outlined in this document. Below are several potential resources that could be utilized to support these initiatives.

U.S. Economic Development Administration (EDA)

The EDA's mission is to forward the Federal economic development agenda by promoting innovation and competitiveness and preparing American regions for economic growth and success within the worldwide economy. This mission is fulfilled through strategic investment and partnerships to create regional economic ecosystems necessary to cultivate competitive regions throughout the United States.

- **Planning and Local Technical Assistance Program:** This program assists eligible recipients in developing economic development plans and studies designed to build capacity and guide the economic prosperity and resiliency of a region. It supports organizations and other eligible recipients with short-term and state planning investments to guide the potential creation and retention of high-quality jobs, particularly for the unemployed and underemployed in the Nation's most economically distressed regions.
- **Build to Scale Program:** The B2S Program builds regional economies through scalable startups through the Venture Challenge and Capital Challenge. Through this program, the EDA manages several grant competitions furthering technology-based economic development initiatives that accelerate high quality job growth, create more economic

opportunities, and support the future of the next generation of industry leading companies.

Florida Department of Economic Opportunity (DEO)

The DEO's primary goal is to assist the Governor in advancing Florida's economy through advocating for the state's economic development vision and by administering state and federal programs that seek to help visitors, citizens, businesses, and communities.

- **Community Development Block Grant:** Federally awarded by the U.S. Department of Housing and Urban Development, CDBG funds are administered through DEO and focus on developing viable communities through the provision of decent housing, suitable living environments, and expanding economic opportunities for persons of low- and moderate-income. The DEO manages several CDBG programs: Florida Small Cities Community Development Block Grant Program, Community Development Block Grant - CV (Corona Virus), and Community Development Block Grant - DR (Disaster Recovery).
- **Community Planning Technical Assistance Grants:** These grants provide counties, municipalities, and regional planning councils the ability to create innovative plans and development strategies to promote diverse economies, vibrant rural and suburban areas, and meet statutory requirements for planning, while protecting environmentally sensitive areas. These grants can also be used for disaster recovery, resilience planning, and economic development planning.
- **Florida Job Growth Grant Fund:** This is an economic development program focused on promoting public infrastructure and workforce training across the state.

Proposals are reviewed by DEO and Enterprise Florida and selected by the Governor to meet the demand for workforce or infrastructure needs in the community they are awarded to.

- **Competitive Florida Partnership Grant:** Competitive Florida Partnership grants offer small and rural cities, along with regional planning councils, the ability to create an asset-based economic development strategy through innovative planning and development.

Florida Department of Environmental Protection (DEP)

- **Florida Recreation Development Assistance Program:** FRDAP is a competitive, reimbursement grant program that offers assistance for acquisition or development of land for public outdoor recreation. County governments, municipalities, and other legally constituted local governmental entities with the responsibility of providing outdoor recreation sites and facilities for the public are all eligible for this program.
- **Florida Forever:** Florida Forever is the State's conservation and recreation land acquisition program and serves as a blueprint for conserving natural resources, thereby renewing Florida's commitment to conserve natural and cultural heritage.
 - **Parks and Open Space Florida Forever Grant Program:** The Parks and Open Space Florida Forever Grant Program helps communities meet the challenges associated with growth, supports viable community development, and protects natural resources and open space. This program receives 21% of the Florida Forever appropriation.

- **Land and Water Conservation Fund:** This is a federal competitive program that provides grants for the acquisition or development of land for public outdoor recreation. Eligible participants include Florida municipalities, county governments, and any other legally constituted local government entities that maintain outdoor recreational sites and facilities for the public.
- **Recreation Trails Program:** RTP is another federally funded competitive grant program through DEP that offers financial assistance to city, county, state, or federal governments or organizations for the development of recreational trails, trailheads, and trailside facilities.
- **Resilient Florida:** The Resilient Florida program is a selection of different grants available to counties, water management districts, flood control districts, and regional resilience entities. Eligible entities may receive funding to analyze and plan for vulnerabilities and implement projects for adaptation and mitigation.

United States Department of Agriculture (USDA)

- **Community Facilities Direct Loan and Grant Program:** This program provides affordable funding in the form of low-interest direct loans or grant awards to purchase, construct, and/or improve essential community facilities, purchase equipment, and pay related expenses. Public bodies and community-based nonprofits within rural areas (outside of Census defined urban areas) are eligible.
- **Economic Impact Initiatives Grants:** These grants provide funding assistance for the development of essential community facilities in rural communities with extreme unemployment

and economic depression. Eligible entities include public bodies, non-profits, and federally recognized tribes.

- **[Rural Economic Development Loan and Grant Program](#)**: This program offers funding for rural projects through local utility organizations. USDA provides zero-interest loans or grants to create RLF programs to local utilities to pass through to local businesses for projects to create and retain employment in local areas. Eligible entities include nonprofit utilities, former Rural Utilities Service borrowers, and current Rural Development Electric or Telecommunication Programs borrowers.
- **[Emergency Community Water Assistance Grants](#)**: This program assists eligible communities in preparing for or recovering from an emergency that threatens the availability of safe, reliable drinking water. Eligible entities include most state and local governmental entities, nonprofit organizations, and federally recognized tribes.

United States Environmental Protection Agency (EPA)

- **[Brownfield Assessment Grant](#)**: Brownfield Assessment Grants provide funding for the recipient to inventory, characterize, assess, conduct planning activities, develop site-specific cleanup plans, and conduct community involvement related to brownfield sites.
- **[Environmental Justice Small Grants Program](#)**: This program supports communities working on solutions to local environmental and public health issues. It focuses on helping communities understand and address exposure to multiple environmental issues and risks. Eligible entities include most non-profits, U.S. territories, and tribal governments and organizations.

Florida Department of Transportation (FDOT)

- **[Transportation Alternative Grants](#)**: This program focuses on funding a variety of small-scale transportation projects such as pedestrian and bicycle facilities, recreational trails, safe routes to school projects, community improvements such as historic preservation and vegetation management, and environmental mitigation related to stormwater and habitat connectivity.
- **[Commuter Assistance Funds](#)**: Florida's Commuter Assistance Program offers quality travel choices to ensure mobility, sustain the quality of the environment, preserve community values, and reduce energy consumption. While funds are generally used for marketing and outreach programs, they can also be used for innovative commuter routes.
- **[State Block Grant Program](#)**: This program offers numerous grants related to different areas of transportation including metropolitan and state transit planning, capital and operating assistance in urban areas, capital projects to meet the needs of the elderly and individuals with disabilities, capital and operating assistance in rural areas, buses and bus facilities, and metropolitan planning.
- **[Fixing America's Surface Transportation Act](#)**: The FAST Act focuses on safety, keeps the established structure of various highway-related programs managed, continues efforts to streamline project delivery, and provides a dedicated source of federal dollars for freight projects.

Federal Transit Administration (FTA)

- **[Grants for Buses and Bus Facilities Program](#)**: This federal program offers funding to states and direct recipients to

replace, rehabilitate, and purchase buses and related equipment as well as construct bus-related facilities including technological changes or innovations to modify low or no emission vehicles or facilities. Funding is provided through formula allocations or competitive grants.

United States Department of Housing and Urban Development (HUD)

- **Choice Neighborhoods Planning Program:** The Choice Neighborhoods program utilizes public and private dollars to support locally driven strategies that address struggling neighborhoods with severely distressed public housing and/or HUD-assisted housing through a comprehensive approach to neighborhood revitalization. The goal is to bring local leaders, residents, and various stakeholders such as public housing agencies, cities, schools, police, business owners, nonprofits, and private developers together to implement a plan that transforms distressed HUD housing and addresses challenges in the surrounding neighborhood.

APPENDIX

APPENDIX I

Focus Area 1: Cultivate a Competitive Economy and Foster Economic Mobility

1.1 ALIGNED PROJECTS

1. **Health Sciences Curriculum Development** – Broward College
2. **Big Pine Key Facility** – The College of the Florida Keys (CFK)
3. **Top Notch Faculty** - Broward College

1.1 PROJECT OUTCOMES

- The development of an in-house Health Sciences Curriculum will reduce training costs for students, align students to the needs of the local labor market, provide a sustainable and more flexible model for workforce training (i.e., face to face, remote, hybrid, community-based, etc.), and provide completion of the development of five health science courses.
- The property will be used to expand the college’s successful Marine Environmental Technician Program and expand partnerships that encourage marine resource research, conservation, and restoration. The College expects to increase research and work-based learning experiences for students enrolled in the MET program. Identified as a training need within the community for CDL and BLE Vehicle Operations as well, the college expects at least sixty (60) CDL and fifty (50) BLE certificate holders and graduates per year.
- The program would establish a pool of top-notch faculty for hard to recruit staff in high-demand industries such as nursing, IT, and the marine industry.

4. **Summer Youth Employment Program** – CareerSource Broward

5. **Expanding Apprenticeship Programs in Broward County** – CareerSource Broward

6. **Workforce Academy** – OIC South Florida

7. **Social Enterprise Workforce / Self-Sufficiency Initiative** – OIC South Florida

8. **Small Business Technical Assistance Program** – Catalyst Miami

- The program would increase not only earnings for the youth and their families, but their knowledge of employability, soft skills, and money management. The program would provide youth with summer jobs and give employers an opportunity to mentor them.
- The program would increase the skills and wages of job seekers through certifications and employers will get a trained workforce based on their requirements.
- Informed by labor market needs, the project will provide certification offerings and soft skills training for career advancement. The program will serve the unemployed & underemployed citizens in underserved communities that have the highest unemployment and lowest educational attainment in the region.
- Provide transitional and experiential workforce development opportunities, including wrap around case management services to the unemployed and under employed individuals.
- The program will build a local ecosystem that supports cooperative development through free educational sessions, community meetings, and collaborations with partner organizations. It will help residents of low-wealth communities launch sustainable businesses that build generational and community-based wealth and become engaged leaders in community economic development efforts. And it will serve as another counter to structural poverty and help equalize economic opportunity.

9. **National Dislocated Worker Grant Funding for clean-up, humanitarian assistance and other Disaster Relief** – CareerSource Broward

10. **Occupational Skills Training – WIOA (Adults and Dislocated Workers)** – CareerSource Broward

11. **Cybersecurity Training Range** – Alan B. Levan NSU Broward Center of Innovation (Levan Center).

- The program would provide temporary work to adversely affected individuals from the disaster and placing them at governmental and non-profit worksites throughout Broward County to aid the recovery; or to provide them occupational training in-demand careers that lead to unsubsidized employment.
- The program would create and develop a talent pipeline by upskilling Broward County residents who are economically disadvantaged and have barriers to employment. The program would also help to address emerging occupational workforce needs, create upward mobility for greater economic independence, and assist employers maintain their competitive position.
- The project will create a fully staffed and operational training facility which can serve as an Emergency or Security Operations Center responding to disasters (pre, during, post) and improve training and communication channels for government and other local agencies. The project will additionally establish one of the most powerful cybersecurity training range in the southeast U.S.A, develop and scale a much needed talent skills pipeline focused on cybersecurity knowledge, awareness, and credentials, expand awareness related to cybersecurity threats including the ability to be proactive and reactive, increase protective measures solidifying cyber defense systems and attract grant funding to support public and private sectors.

12. **Alan B. Levan** | NSU Broward Center of Innovation

13. **Smart Cities Artificial Intelligence (AI) Labs** – Levan Center NSU

14. **Volumetric Motion Capture Studio** – Levan Center NSU

15. **Worker Owned Enterprises Academy and Incubator** – Catalyst Miami

16. **Small Business Technical Assistance Program** – Catalyst Miami

- Breakthrough ideation, creation of new technologies, talent skills pipeline (emerging technology sectors), company formation, job creation, scaling of early-stage and young startup companies.
- Establishment of the first AI Smart Cities Lab in the southeast region of the U.S.A. Homegrown talent skills pipeline leading to retaining of such talent in South Florida. New company formation. Attraction of new industries and companies.
- South Florida could be designated as a Center of Excellence in Spatial Computing. The studio could be utilized as a valuable resource for simulation of events (i.e., emergency response, disaster planning) by creating real life scenarios.
- The program is an academy and incubator. Academy: Participants receive comprehensive knowledge about worker cooperatives and the business, management, and financial skills needed to launch one. Incubator: Catalyst provides the business, financial, and legal help they need to launch their ventures. The program has graduated nearly fifty learners, launched one cooperative, and is supporting four cooperatives in various stages of incubation.
- Served 110 Small businesses with business counseling, incorporation, organization, brand development, assistance in applying for federal, state, local financial relief programs, capacity building, and various administrative support.

1.1 POSSIBLE ACTION PARTNERS

- Alan B. Levan NSU Broward Center of Innovation
- Broward College
- Broward College's Talent and Culture Department
- Broward County
- Broward County Public Schools (CTACE)
- Broward Health
- CareerSource Broward
- Chambers of Commerce
- Children's Services Council
- Cities/Municipalities
- City of Key West
- Cleveland Clinic
- Community-based Organizations
- Florida Department of Education
- Florida Keys Aqueduct Authority
- Holy Cross Hospital
- Industry Associations
- Keys Energy Services
- Memorial Healthcare Systems
- Miami-Dade College
- Monroe County Emergency Management Services
- Monroe County Sheriff's Office
- Mote Marine Laboratory
- Regional Employers/ Staffing Agencies
- Youth Services
- FIU SBDC
- Prospera
- Community Fund of North Miami Dade (OLCDC)
- Miami Bayside Foundation
- SCORE
- South Florida Anchor Alliance
- Entrepreneurs

- Tech Industry
- Funders and Professional Networks

1.1 SUCCESSFUL OUTCOMES

- Diversity training and programs will be provided.
- Employers have access to new training programs that focus on their needs.
- Allow small businesses and individuals to receive assistance evaluating their business for adapting or pursuing ideas for establishing a new business or reinventing a current business.
- Increase the availability of innovation skills for dislocated workers with key elements of future job skills.
- Workforce training programs are aligned with business and industry needs and are developed, funded, and provided through close collaboration between businesses, educators, and government.
- Out-of-state trained, certified, and licensed workers, including skilled workers and professionals, move to the region, augmenting an already large pool of well-trained workers.
- Training in the trades is consistent across the region.
- Provide innovative solutions and digital technologies that will help resource constrained governments and regulators address capacity challenges and improve regulatory capacity, service delivery, and crisis management.
- Augment and enhance support services in the areas of job training, childcare, success coaching, education, social services, and assist with work-related needs to transition low income, structurally unemployed individuals to living wage jobs and career pathways.
- Advance equity by assisting resident entrepreneurs from low-wealth communities in launching sustainable businesses that will generate and build generational and community-based wealth.
- Advance equity by assisting resident entrepreneurs from low-wealth communities in launching sustainable businesses that

will generate and build generational and community-based wealth

- Create new technologies, recruit new companies, generate scaling of early stage and young startup companies that will bring job creation.

2.1 ALIGNED PROJECTS

1. **Flagler Village Complete Streets Improvements** – Fort Lauderdale DDA
2. **Reimagining Huizenga Park** – Fort Lauderdale DDA
3. **Riverwalk Seawall Improvements** – Fort Lauderdale DDA
4. **Smart Cities Artificial Intelligence (AI) Labs** – Levan Center NSU

2.1 PROJECT OUTCOMES

- The project will provide multimodal connectivity to the Brightline Station to a future regional commuter rail system with Downtown Fort Lauderdale and Flagler Village at the geographic center.
- With a multi-generational appeal, the park will incorporate core themes centered around art, resilience, and wellness. Cities need engaging and activated parks and outdoor spaces to support health and wellness, improve environmental resiliency, and enhance social and creative connections.
- As sea levels rise, improving the seawall along the Riverwalk Linear Park is essential to preserving a regional public space of significance and notable cultural amenities.
- The project will localize smart cities technology currently only available in California. The project will also create new opportunities to develop and implement new programs (i.e., degrees, certifications, short-courses, seminars, workshops) with the focus on AI smart cities planning leading to company formation, recruitment of new companies, retaining of skilled talent.

2.1 POSSIBLE ACTION PARTNERS

- City of Fort Lauderdale
- Broward Metropolitan Planning Organization
- Brightline
- Riverwalk Fort Lauderdale
- NSU Art Museum
- Broward College
- Florida Atlantic University
- Broward County

2.1 SUCCESSFUL OUTCOMES

- Provide multimodal connectivity
- Create an interconnected system of transit and transportation opportunities that are easily accessible to all residents.
- Increased working relationship with transportation agencies and local governments
- Coordinate economic development efforts with regional current and proposed infrastructure projects.
- Coordinate economic development efforts with regional current and proposed infrastructure projects.

Focus Area 3: Design, Construct, and Maintain Resilient Infrastructure to Support Sustainable Business and Population growth

3.4.3 Enhance and protect the environment and the region's natural resources.

3.1 ALIGNED PROJECTS

1. **Technology and Innovation for Coral Restoration in South Florida** – South Florida Regional Planning Council

3.1 PROJECT OUTCOMES

- The project's purpose is to capitalize on increasing demand for coral restoration in South Florida and other reef communities. This project would fuel innovation and entrepreneurship in coral propagation and restoration technology, create opportunities for job creation in both tech and environmental restoration, increase investment and employment opportunities, and advance a high priority environmental and economic development initiative.

3.1 POSSIBLE ACTION PARTNERS

- South Florida Regional Planning Council
- Economic Development Organizations
- Florida Department of Environmental Protection
- Private Foundations
- Research universities
- Business Leaders

3.1 SUCCESSFUL OUTCOMES

- Fuel innovation and entrepreneurship in coral restoration technology
- Incubation of novel coral restoration technology, bringing together the technology and coral restoration sectors.
- Accelerator to commercialize technologies for use in public and private coral restoration industries within and beyond Florida.
- Increase investment opportunities in the field
- Support for a high priority environmental initiative
- Proof-of-concept deployment of pilot units at 2 partner organizations with land-based coral nurseries in South Florida.
- Planning for next steps in further developing a technology-driven 'coral restoration economy' for South Florida.
- Create opportunities for job creation in both tech and environmental restoration.

APPENDIX II

All Sectors: County Business Patterns 2020

2020	Miami-Dade	Broward	Monroe
All Establishments	90,482	64,660	3,885
< 5 employees	62,041	44,082	2,552
5 to 9 employees	12,042	8,182	603
10 to 19 employees	7,587	5,609	364
20 to 49 employees	5,475	4,235	249
50 to 99 employees	1,817	1,367	84
100 to 249 employees	1,062	877	27
250 to 499 employees	314	200	5
500 to 999 employees	51	72	0
1,000 employees or more	23	36	0
1,000 to 1,499 employees	15	16	0
1,500 to 2,499 employees	9	9	0
2,500 to 4,999 employees	15	8	0
5,000 or more employees	4	3	0
Annual Payroll (\$1000) All Establishments	51,381,658	37,387,991	1,182,959
Number of Employees	1,009,024	736,661	32,757
% of Businesses < 19 Employees	0.902%	0.894%	0.906%
Source: U.S. Census, 2020 County Business Patterns			

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APPENDIX III

Miami-Dade County Industries				
NAICS	Industry	Employees	Average Annual Wages	Percent of Jobs
62	Health Care and Social Assistance	177,762	\$62,933	14%
44	Retail Trade	143,248	\$42,850	11%
72	Accommodation and Food Services	117,806	\$35,501	9%
48	Transportation and Warehousing	108,763	\$55,252	8%
54	Professional, Scientific, and Technical Services	101,630	\$94,075	8%
56	Administrative and Support and Waste Management and Remediation Services	95,235	\$39,303	7%
61	Educational Services	85,444	\$58,212	7%
23	Construction	82,591	\$45,811	6%
42	Wholesale Trade	69,261	\$76,985	5%
81	Other Services (except Public Administration)	65,148	\$35,817	5%
92	Public Administration	63,488	\$81,766	5%
52	Finance and Insurance	53,171	\$133,796	4%
31	Manufacturing	44,179	\$55,288	3%
53	Real Estate and Rental and Leasing	38,941	\$60,278	3%
51	Information	20,404	\$108,422	2%
71	Arts, Entertainment, and Recreation	19,069	\$75,427	1%
55	Management of Companies and Enterprises	11,087	\$139,625	1%
11	Agriculture, Forestry, Fishing and Hunting	10,192	\$41,405	1%
<i>Source: Jobs EQ, Data as of 2021Q4</i>				

Broward County Industries				
NAICS	Industry	Employees	Average Annual Wages	Percent of Jobs
62	Health Care and Social Assistance	120,063	\$64,551	13%
44	Retail Trade	109,789	\$45,387	12%
56	Administrative and Support and Waste Management and Remediation Services	86,018	\$47,471	10%
72	Accommodation and Food Services	77,423	\$27,965	9%
54	Professional, Scientific, and Technical Services	70,118	\$85,840	8%
23	Construction	61,728	\$55,147	7%
61	Educational Services	52,646	\$55,379	6%
42	Wholesale Trade	46,564	\$83,105	5%
48	Transportation and Warehousing	45,730	\$56,161	5%
81	Other Services (except Public Administration)	45,421	\$36,749	5%
92	Public Administration	42,432	\$75,445	5%
52	Finance and Insurance	40,792	\$97,478	5%
31	Manufacturing	29,684	\$60,562	3%
53	Real Estate and Rental and Leasing	27,681	\$55,507	3%
51	Information	18,499	\$113,352	2%
71	Arts, Entertainment, and Recreation	14,992	\$45,909	2%
55	Management of Companies and Enterprises	7,561	\$149,806	1%
<i>Source: Jobs EQ, Data as of 2021Q4</i>				

Monroe County Industries				
NAICS	Industry	Employees	Average Annual Wages	% of Jobs
72	Accommodation and Food Services	13,327	\$40,866	29%
44	Retail Trade	5,582	\$38,899	12%
23	Construction	3,865	\$50,146	9%
92	Public Administration	2,999	\$69,082	7%
62	Health Care and Social Assistance	2,637	\$63,679	6%
56	Administrative and Support and Waste Management and Remediation Services	2,325	\$46,860	5%
54	Professional, Scientific, and Technical Services	2,057	\$77,588	5%
81	Other Services (except Public Administration)	2,016	\$39,537	4%
61	Educational Services	1,991	\$55,595	4%
53	Real Estate and Rental and Leasing	1,826	\$51,001	4%
71	Arts, Entertainment, and Recreation	1,626	\$41,135	4%
48	Transportation and Warehousing	1,513	\$45,168	3%
52	Finance and Insurance	792	\$115,134	2%
42	Wholesale Trade	674	\$63,489	1%
11	Agriculture, Forestry, Fishing and Hunting	598	\$36,843	1%
22	Utilities	580	\$85,793	1%
51	Information	440	\$65,191	1%
31	Manufacturing	392	\$56,021	1%
<i>Source: Jobs EQ, Data as of 2021Q4</i>				

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