

CITY OF PEMBROKE PINES

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN



AUGUST 2014

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2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

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TABLE OF CONTENTS

Acknowledgements	ii	Economic Development Incentives	49
SECTION 1.....	1	Florida Economic Development	
ECONOMIC PROFILE	2	Incentives Toolbox	50
History	3	E-Florida Incentives	50
Demographics	3	Targeted Industry Incentives	50
Housing	5	Workforce Training Incentives	51
Education	8	Infrastructure Incentives	51
Employment.....	9	Special Opportunity Incentives	51
Location Quotients.....	11	Discussion of Florida Incentives	52
Competitive Market Assessment.....	14	Broward County Economic	
Retail Sector.....	14	Development Incentives	53
Office Sector.....	16	Benchmarked City Incentives.....	54
Industrial Sector	17	Other Incentive Programs Used in Florida.....	55
Pembroke Pines Regional Market	18	Development Incentive Guidelines.....	56
The Primary Market Areas.....	19	Economic Development Incentives	57
Workforce	21	SECTION 3.....	61
Quality Of Life	23	Strengths, Weaknesses, Opportunities and	
Recognition	23	Threats (SWOT).....	62
Services	23	SWOT Summary	65
Crime	25	Strategic Economic	
Pembroke Pines Population Projections....	26	Development Themes.....	66
Community Assessment	27	Strategic Plan Framework	67
Future Land Use Map	27	Goals, Objectives and Strategies	67
Redevelopment Opportunities.....	30	Organizational Responsibilities.....	67
City Center Layout	32	Implementing the Strategic Plan.....	68
Other Opportunities	33	Conclusion.....	69
Competitive Position	35	Strategic Action Plan.....	69
Competitive Tax Position	35	Action Plan for Change	70
Benchmarks	37	Overview of Goals	71
City of Ormond Beach	37	EDSP Implementation Matrix	79
City of Deltona	38	APPENDICES	85
City of Port St. Lucie.....	40	APPENDIX 1: Pembroke Labor &	
City of Cape Coral	42	Workforce Statistics.....	86
Benchmark Summary	43	APPENDIX 2: Stakeholder Responses	89
SECTION 2	44	APPENDIX 3: Broward County	
Six Pillars Broward Community Plan	45	2010 Target Industries.....	96
Target Industries	45		
State of Florida/Enterprise Florida	46		
Broward County	46		
The Greater Fort Lauderdale Alliance.....	46		
The Beacon Council.....	47		
Recommended Target Industries for			
Pembroke Pines.....	47		

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Vice Mayor Jay Schwartz
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Commissioner Iris Siple
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Other Noted Participants

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CareerSource Broward
Broward College
Space Florida
Bergeron Land Development
Woolbright Development, Inc.
Duke Realty
CBRE, Inc.

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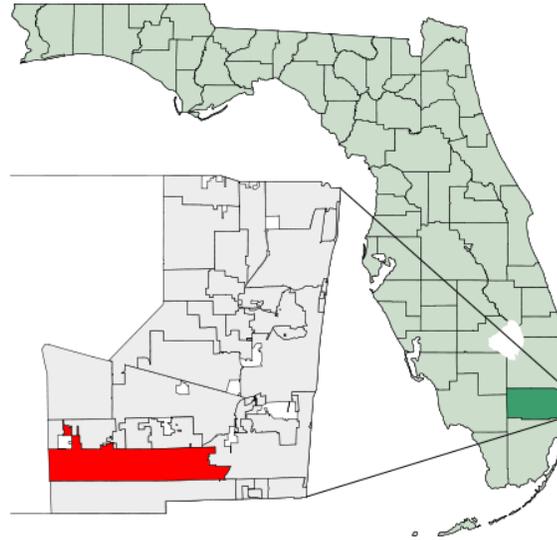
SOCIOECONOMIC PROFILE

ECONOMIC PROFILE

The City of Pembroke Pines (City) is located in southwest Broward County. The City encompasses approximately 35 square miles and is unique as it is approximately 13+ miles long and for the most part, is only 2 miles wide. The City is bounded by the Florida Turnpike to the east, and US 27 on the west, with I-75 cutting across its center. As of the 2010 Census, the City had a population of 159,014 and was the second largest city within the county having only 11,733 less residents than the City of Fort Lauderdale.

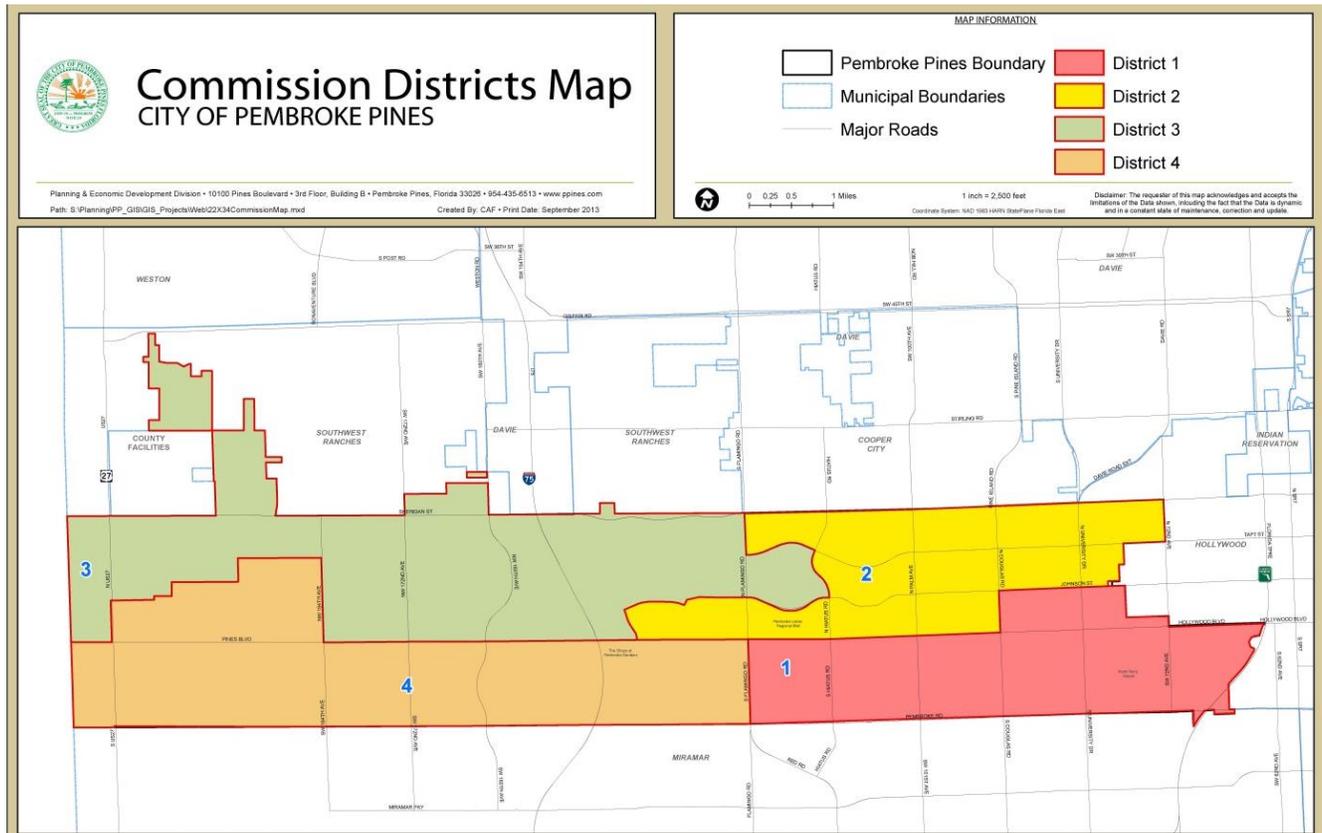
The City is divided into 4 commission districts has shown in the following graphic. District lines are well suited for the City’s economic and redevelopment planning efforts. The two main areas for redevelopment are the found within Districts 1 and 2, while Districts 3 and 4 represented newer developments and most of the major employment centers.

Figure 1. Pembroke Pines Location within Florida



Source: wikipedia.org

Figure 2. Commission District Map



Source: City of Pembroke Pines

History

Pembroke Pines was named from the first two subdivisions that were located immediately east of what is now the North Perry Airport. It was then known as the “Village of Pembroke Pines” and was incorporated into a town in 1959. In January 1960, Pembroke Pines elected to become a city. This small property was less than a square mile and was between Hollywood Boulevard, Pembroke Road, SW 72nd Avenue and the Florida Turnpike to the east. The City began to annex lands to the west in the 1970s; in 1980 it annexed the western property from Flamingo Road to U.S. 27, doubling the size of the city. In the early 1980s I-75 was completed providing excellent connectivity to the western portions of Dade and Broward Counties.

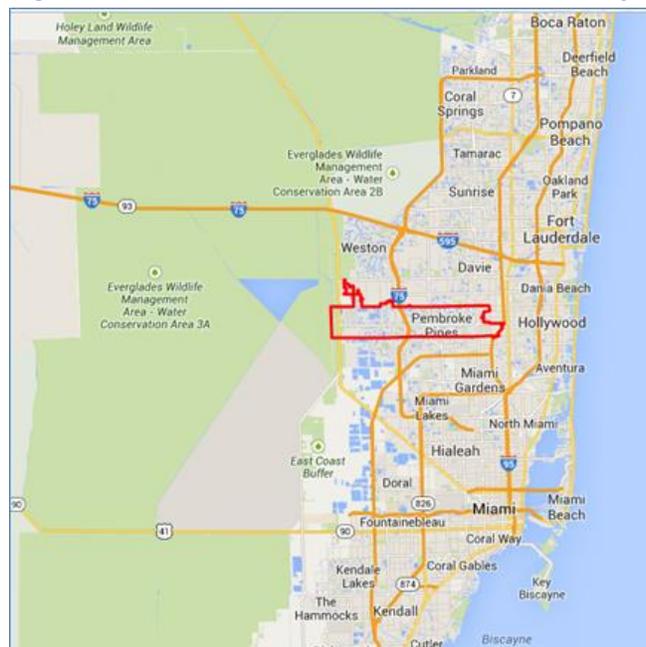
Much of the growth of the City is attributed to the impact of Hurricane Andrew (1992) to the Miami area especially the cities of Homestead and Hialeah. A significant portion of the City’s population relocated to the newly annexed western portions of Pembroke Pines. Between 1990 and 2000, the City grew by 110% largely due to the relocation impacts of Hurricane Andrew.

Demographics

The City of Pembroke Pines has grown from a population of 1,429 in 1960 to an estimated 2013 population of 155,565 based on Census and University of Florida Bureau of Business Research estimates. The Nielsen Company, an independent demographic and marketing firm, estimates the City’s 2014 population at 163,540.

Based on 2010 Census figures, the City’s ethnicity was 67% white (which includes white Hispanics), slightly higher than Broward County but less than the State of Florida as a whole. The City’s Hispanic population represented 41% of the City’s population significantly higher than Broward County or the State of Florida. Blacks or African-Americans accounted for approximately 20% of the City’s population, which is significantly lower than Broward County as a whole but higher than the State’s total.

Figure 3. Pembroke Pines Location within Tri County Area



Source: www.maptechnica.com

Table 1. Historic Population

Year	Pop.	Annual Growth
1960	1,429	-
1970	15,520	98.61%
1980	35,776	13.05%
1990	65,566	8.33%
2000	137,427	10.96%
2010	154,750	1.26%
2013	162,329	1.63%

Source: US Department of Commerce, 2014; Strategic Planning Group, Inc.

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Table 2. Pembroke Pines Ethnicity, 2010

Census Comparison prior Censuses	Pembroke Pines	Broward County	Florida
Total population	154,750	1,748,066	18,801,310
Population, percent change, 2000 to 2010	12.60%	7.70%	17.60%
Population, percent change, 1990 to 2000	109.97%	29.27%	23.53%
White or Caucasian (including White Hispanic) (Non-Hispanic White or Caucasian)	67.30%	63.10%	75.00%
Black or African-American	32.90%	43.50%	57.90%
Hispanic or Latino (of any race)	19.80%	26.70%	16.00%
Hispanic or Latino (of any race) 1990	41.40%	25.10%	22.50%
Asian	11.51%	8.64%	12.17%
Native American or Native Alaskan	4.90%	3.20%	2.40%
Pacific Islander or Native Hawaiian	0.30%	0.30%	0.40%
Two or more races (Multiracial)	0.00%	0.10%	0.10%
Some Other Race	3.30%	2.90%	2.50%
	4.40%	3.70%	3.60%

Source: 2010 US Census; Strategic Planning Group, Inc. 2014

The 2014 estimates show the City increasing the percentage of Hispanics, an increase from 11.5% in 1990 to 45% as shown in Tables 2 and 3.

The 2010 Census estimated that the City had a median age of 39.5 years compared to 36.75 in 2000. Approximately 20% of the City's population was 14 years old or younger, while approximately 15% were 65 years old or older. Approximately 8% of the City's residents are 75 years old or older.

Table 3. Pembroke Pines Ethnicity, 2014

Description	Total	%
2014 Est. Population by Single Classification		
Race	163,540	
White Alone	109,306	66.84
Black or African American Alone	31,836	19.47
American Indian and Alaska Native Alone	473	0.29
Asian Alone	8,209	5.02
Native Hawaiian and Other Pacific Islander Alone	97	0.06
Some Other Race Alone	7,760	4.75
Two or More Races	5,859	3.58
2014 Est. Population Hispanic or Latino	163,540	
Hispanic or Latino	74,236	45.39
Not Hispanic or Latino	89,304	54.61

Source: The Nielson Company

Table 4. Age Distribution

Subject	2010 Number	2010 Percent	2000 Number	2000 Percent
SEX AND AGE				
Total population	154,750	100.0	137,427	
Under 5 years	8,757	5.7	9,824	7.1
5 to 9 years	9,595	6.2	10,135	7.4
10 to 14 years	11,049	7.1	9,862	7.2
15 to 19 years	11,340	7.3	8,077	5.9
20 to 24 years	9,081	5.9	6,079	4.4
25 to 34 years	9,010	5.8	20,445	14.9
35 to 44	22,703	14.7	25,548	18.6
45 to 54	24,591	15.9	16,739	12.2
55 to 64	16,597	10.7	9,817	7.1
65 to 74	10,537	6.8	9,665	7.0
75 to 84	8,405	5.4	8,716	6.3
85 +	3,973	2.6	2,500	1.8
Median age (years)	39.5	(X)	36.75	(X)

Source: US Census 2014; Strategic Planning Group, Inc., 2014

Housing

The 2010 Census estimated that the City had 61,703 housing units of which approximately 8% were vacant. In 2010 approximately 76% of the housing was owner occupied. The 2013 American Community Survey (2008-2012) estimated that the City had 62,107 housing units of which 9.8% were estimated to be vacant. Homeowner vacancy rate was estimated at 2% while rental housing vacancy is estimated to be 9.4%.

Census vacancy data is based on all rental properties including single family dwelling units. As of June 30, 2014, REIS reports that the Pembroke Pines/Miramar apartment submarket of Broward County had a vacancy rate of 3.7%.

The City’s housing density is fairly high with only 48% of its housing being single family detached housing. Slightly over 23% of the housing is contained in structures with 20 or more units. The 2012 American Community Survey estimated that the City had 529 mobile homes.

Households

Approximately 72% of the City’s 2014 households were family households as shown.

Slightly over 72% of the City’s households had children in 2014. Of those households with children, 34% were married families with their own children.

Table 5. Housing Occupancy

	Estimate	Margin of Error	Percent	Percent Margin of Error
HOUSING OCCUPANCY				
Total housing units	62,107	+/-926	62,107	(X)
Occupied housing units	56,039	+/-961	90.2%	+/-1.0
Vacant housing units	6,068	+/-633	9.8%	+/-1.0
Homeowner vacancy rate	2.0	+/-0.5	(X)	(X)
Rental vacancy rate	9.4	+/-2.2	(X)	(X)

Source: 2008-2012 American Community Survey 5-Year Estimates

Table 6. Housing Type, 2012

	Estimate	Margin of Error	Percent
UNITS IN STRUCTURE			
Total housing units	62,107	+/-926	62,107
1-unit, detached	29,881	+/-712	48.1%
1-unit, attached	8,637	+/-534	13.9%
2 units	210	+/-104	0.3%
3 or 4 units	1,117	+/-240	1.8%
5 to 9 units	3,167	+/-424	5.1%
10 to 19 units	4,168	+/-418	6.7%
20 or more units	14,398	+/-697	23.2%
Mobile home	529	+/-131	0.9%
Boat, RV, van, etc.	0	+/-32	0.0%

Source: American Community Survey, 2008-2012

Table 7. Households by Type, 2014

	Total	%
2014 Est. Households by Type	59,392	
Family Households	42,539	71.62
Nonfamily Household	16,853	28.38

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Table 8. Households with Children

	Total	%
2014 Est. Household Type, Presence		
Own Children	42,539	
Married-Couple Family, own children	14,475	34.03
Married-Couple Family, no own children	16,305	38.33
Male Householder, own children	1,252	2.94
Male Householder, no own children	1,570	3.69
Female Householder, own children	4,515	10.61
Female Householder, no own children	4,422	10.4

Source: © 2014 The Nielsen Company. All rights reserved.

Table 9. Household Size, 2014

	Total	%
2014 Est. Households by Household Size	59,392	
1-person household	14,143	23.81
2-person household	16,912	28.48
3-person household	10,858	18.28
4-person household	9,992	16.82
5-person household	4,720	7.95
6-person household	1,735	2.92
7 or more person household	1,032	1.74
2014 Est. Average Household Size	2.74	

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Household Income

The City’s estimated 2014 average household income is \$72,772 and the median household income is \$58,580. Slightly over 21% of the City’s households have household incomes of less than \$25,000 while approximately 15% have household incomes of \$125,000 or more.

Approximately 24% of the City’s households were 1 person households and 54% were 2 person or less households. The average household size is 2.74 persons per household.

Housing Values

Based on data from Zillow.com, the City’s median home sales price was \$209,000 as of the end of July. Home values peaked at slightly below \$300,000 in January 2007. Median sales price per SF peaked at \$214 in January 2007 and declined to \$85 per SF in 2010 and as of the end of July 2014 had risen back to \$142 per SF.

As of the end of the end of July, Zillow.com estimates that the City’s median home value¹ is \$227,300, an increase of 18.0% over the year. Overall housing values peaked at the beginning of 2007 at \$332,000.

Table 12 shows the comparable home values for other nearby cities. Pembroke Pines home values exceeded those of Miramar which is located immediately to its south. Southwest Ranches, lying immediately to its north had the highest values of nearby housing.

The City’s housing values are influenced by five large 55+ condominium projects, the largest being Century Village with 7,700 units which was built in the 1970’s and have an average listing price of a \$100,000.

Table 10. Household Income, 2014

	Total	%
2014 Est. Households by Household Income	59,392	
CY HHs, Inc < \$15,000	6,165	10.38
CY HHs, Inc \$15,000 - \$24,999	6,525	10.99
CY HHs, Inc \$25,000 - \$34,999	5,613	9.45
CY HHs, Inc \$35,000 - \$49,999	7,618	12.83
CY HHs, Inc \$50,000 - \$74,999	11,000	18.52
CY HHs, Inc \$75,000 - \$99,999	8,689	14.63
CY HHs, Inc \$100,000 - \$124,999	5,065	8.53
CY HHs, Inc \$125,000 - \$149,999	3,371	5.68
CY HHs, Inc \$150,000 - \$199,999	3,392	5.71
CY HHs, Inc \$200,000 - \$249,999	838	1.41
CY HHs, Inc \$250,000 - \$499,999	980	1.65
CY HHs, Inc \$500,000+	136	0.23

2014 Est. Average Household Income	\$72,772
2014 Est. Median Household Income	\$58,580

Source: © 2014 The Nielsen Company. All rights reserved

Table 11. Pembroke Pines Home Prices and Home Values

\$227,300 Zillow Home Value Index [?](#)



Source: Zillow.com, 2014

Table 12. Comparable City Home Values

Compare Cities Near Pembroke Pines

	Zillow Home Value Index	Y-o-Y
Pembroke Pines	\$227,300 ▲	18.0%
Miramar	\$205,200 ▲	14.4%
Southwest Ranches	\$569,000 ▲	6.8%
Cooper City	\$322,800 ▲	13.9%
Country Club	\$146,700 ▲	26.4%
Palm Springs North	\$262,500 ▲	11.1%

Source: Zillow.com, 2014

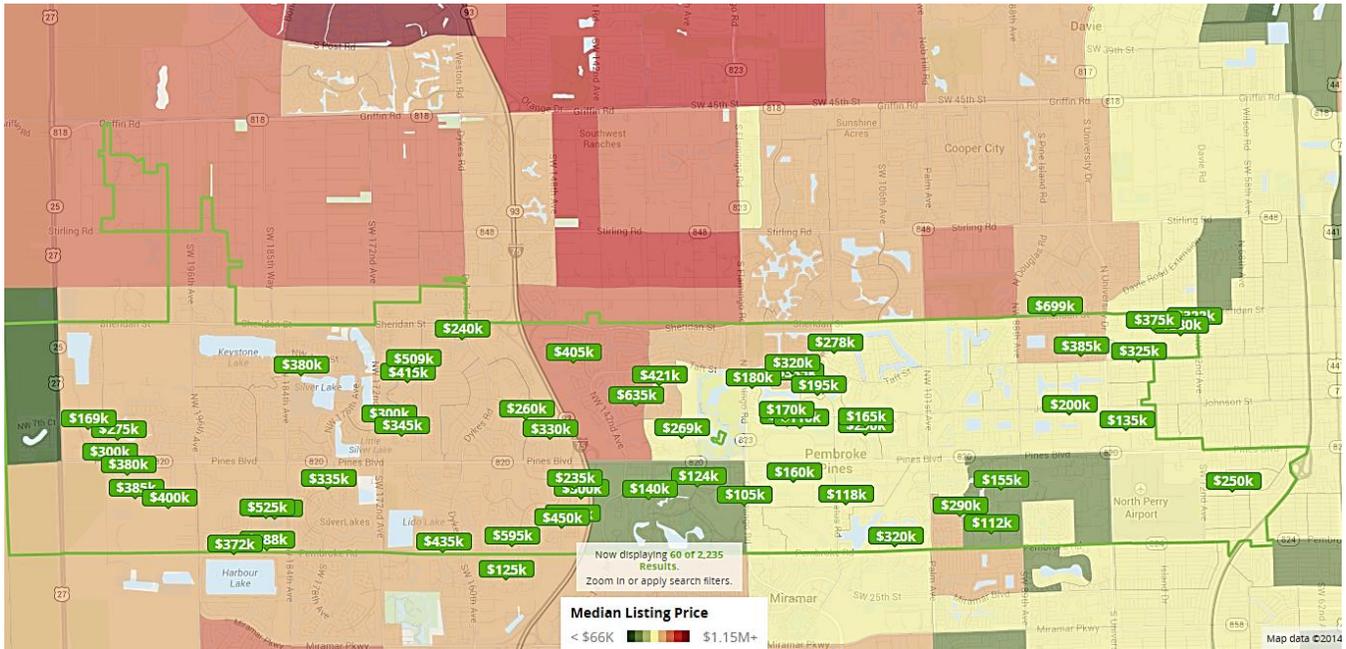
¹ Value is for all units as opposed to the preceding analysis which is only homes that sold.

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The housing “heat map” indicates most of the housing within the City is moderately priced as shown by the median listing prices. The June 2014 median listing price in the dark green portion was slightly below \$60,000, while the two center green sections had a

median listing price of \$90,000. The yellow sections averaged \$160,000 while the beige areas predominately west of I-75 had an average median list price in mid \$300,000s and the brown in the mid \$400,000s.

Figure 4. City of Pembroke Pines Median Listing Price Heat Map, June 2014



Source: Trulia.com, 2014

The City has over 2,500 units of residential development in progress:

1. Raintree - 500 Units with a mixture of Single Family and Town Homes
2. Cobblestone Phase 3 - 88 Town Home Units
3. Centra Falls - 88 Town Home Units
4. Modera Pembroke Pines - 700 unit luxury rental
5. Related Pembroke Pines - 365 unit luxury rental
6. Altis Sheridan Village - 300 unit luxury rental
7. Altis Pembroke Gardens - 280 unit luxury rental
8. University Pasadena - 232 unit luxury rental

Education

The residents of Pembroke Pines are relatively well educated. Approximately 90% of its residents aged 25 or more have a high school or higher educational attainment and 32% have a bachelor degree or higher. Of the population that is between 25 and 34 years of age, the cohort has 40% achieving a bachelor or higher degree.

Education System

The City of Pembroke Pines established its own Charter School System as a result of its rapid growth in the early 2000's. It was the first municipally owned and operated Charter School system in the nation. The City's 7 Charter Schools of which East Campus K-8, Central Campus K-8, Western Elementary K-5, FSU Elementary K-5, West Middle School and Charter High School are "A" Schools and have an enrollment of slightly over 5,600 students.

In addition to the City's Charter School System, there are an additional nine Charter Schools (4 elementary, 2 middle and 3 high schools. The Broward County School system also contain 15 schools within the City (9 elementary, 3 middle, 2 high school and one technical school).

Table 13. Educational level, 2008-12

Level of Education	%	Error Margin
Population 25 years and over	107,968	+/-1,190
Less than 9th grade	4.2%	+/-0.5
9th to 12th grade, no diploma	5.9%	+/-0.6
High school graduate (includes	24.4%	+/-1.1
Some college, no degree	21.7%	+/-1.1
Associate's degree	11.3%	+/-0.9
Bachelor's degree	20.0%	+/-1.0
Graduate or professional degree	12.4%	+/-0.9
Percent high school graduate or	89.8%	+/-0.7
Percent bachelor's degree or higher	32.4%	+/-1.1

Source: American Community Survey, 2008-2012

Higher Education

The City currently has nine institutions of higher education:

- Broward College (Southern Campus)
- Florida International University (Satellite Campus)
- Barry University (Satellite Campus)
- Keiser University
- Jose Maria Vargas University
- Florida Technical College
- Florida Career College
- University of Phoenix
- Strayer University

In addition, the immediate region contains the following higher educational institutions:

Nova Southeastern University is the nation's ninth largest independent university with 27,000 students, more than 162,000 alumni, a sprawling, 314-acre Fort Lauderdale-Davie campus.

Technological University of America (TUA) offers master's, bachelor's and associate's degree programs in IT, technology and engineering-related fields such as telecommunications, network engineering, information technology engineering, systems engineering, business and ESL.

Florida Atlantic University serves more than 30,000 freshmen, transfers and graduate students at sites throughout its six-county service region in southeast Florida.

Employment

As shown in Table 14, residents have a wide range of occupations. The five largest occupations by number of residents are: Office and Administrative Support (7,436), Sales and Related (7,359), Healthcare Practitioners and Technical (5,330), Management (4,051), and Transportation and Material Moving (3,285).

Pembroke Pines’ residents are employed in a wide range of occupations. It should be noted that only 19.7% of City residents actually work within the City while 37.2% work outside Broward County.

The City of Pembroke Pines is estimated to have 5,295 business establishments in 2014, employing 45,770 persons. Two employment sectors; Retail trade (11,928 jobs) and Healthcare and Social Assistance (11,449 jobs), account for 51% of all of the City’s employment. Healthcare and Social Assistance accounted for the most establishments (1,428 firms) followed by retail with 942 firms.

Table 14. Pembroke Pines Businesses by NAICS Code, 2014

SOC Code	Occupation Description	Total	%
11	Management	4,051	7.55
13	Business and Financial Operations	2,317	4.32
15	Computer and Mathematical	795	1.48
17	Architecture and Engineering	304	0.57
19	Life, Physical, and Social Science	256	0.48
21	Community and Social Services	999	1.86
23	Legal	232	0.43
25	Education, Training, and Library	2,569	4.79
27	Arts, Design, Entertainment, Sports, and Media	735	1.37
29	Healthcare Practitioners and Technical	5,330	9.94
31	Healthcare Support	1,159	2.16
33	Protective Service	604	1.13
35	Food Preparation and Serving Related	1,291	2.41
37	Building and Grounds Cleaning and Maintenance	2,681	5
39	Personal Care and Service	2,322	4.33
41	Sales and Related	7,359	13.72
43	Office and Administrative Support	7,436	13.86
45	Farming, Fishing, and Forestry	142	0.26
47	Construction and Extraction	1,281	2.39
49	Installation, Maintenance, and Repair	2,041	3.81
51	Production	1,115	2.08
53	Transportation and Material Moving	3,285	6.12
99	Unclassified	5,331	9.94
		53,635	100

Source: © 2014 The Nielsen Company. All rights reserved.

List of Largest Employers

The City’s top employers are:

1. Memorial Healthcare Systems
2. School Board of Broward County
3. City of Pembroke Pines
4. Bergeron Land Development
5. Autonation
6. GDKN Corporation
7. AJA CC Holdings
8. Total Food Service Direction
9. Claris Corporation
10. Cintas
11. Linder Industrial Machinery
12. Holman Enterprises
13. Zinn Automotive Group
14. Publix
15. Wal-Mart

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Table 15 shows Businesses (by 2 digit NAICS code) located within Pembroke Pines in 2014 according to Nielsen Company data.

Based on 2011 employment data from the US Census, only 6,141 residents actually work within the City. As shown below, the City imports 32,699 workers while it exports 59,145 employees.

The City's overall labor shed is depicted in Figure 6. As shown the City residents are employed throughout the region.

Table 15. Pembroke Pines Businesses by NAICS

NAICS Code	Business Description	Establishment	Employees	Sales (in Millions)
11	Agriculture, Forestry, Fishing and Hunting	10	21	\$1.6
21	Mining, Quarrying, and Oil and Gas Extraction	0	0	\$0.0
22	Utilities	2	12	\$21.6
23	Construction	323	1,378	\$331.3
31-33	Manufacturing	102	424	\$122.2
42	Wholesale Trade	201	975	\$2,192.1
44-45	Retail Trade	942	11,928	\$3,209.4
48-49	Transportation and Warehousing	124	1,794	\$178.3
51	Information	132	1,118	\$515.3
52	Finance and Insurance	479	1,761	\$584.5
54	Professional, Scientific, and Technical Services	592	2,221	\$327.5
55	Management of Companies and Enterprises	7	17	\$12.1
56	Admin and Support and & Mgmt and Reme Svcs	344	1,463	\$151.0
61	Educational Services	147	3,427	\$11.9
62	Healthcare and Social Assistance	1,428	11,449	\$1,212.2
71	Arts, Entertainment, and Recreation	82	656	\$36.8
72	Accommodation and Food Services	380	7,126	\$415.7
		5,295	45,770	\$9,323.5

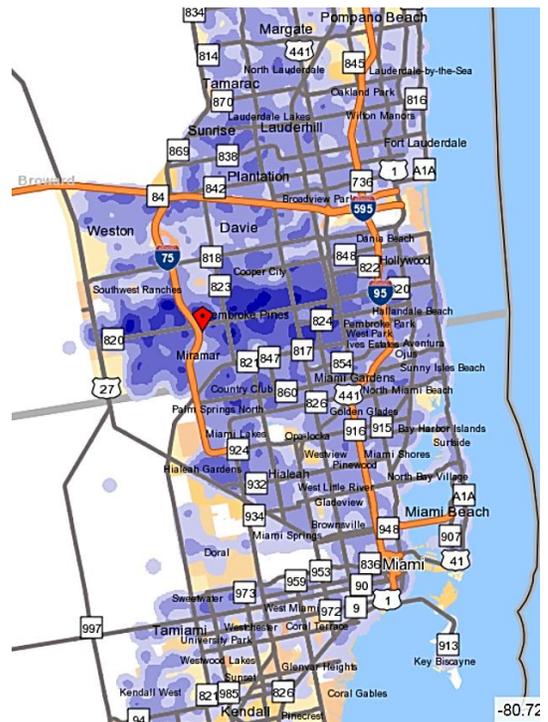
Source: © 2014 The Nielsen Company. All rights reserved.

Figure 5. Pembroke Business Labor (Work to Home), 2011



Source: US Census, OnTheMap, 2014

Figure 6. Pembroke Pines Labor Shed 2011



Source: US Census, OnTheMap, 2014

Location Quotients

Location Quotients show the relative clustering of types of employment compared to the Nation. If an industry represents the national average, it receives a value of 1.0. Industries that exceed 1.0 show that an area exceeds the national average and for the most part means that the economic output is largely external to the area or what economists refer to a “Basic Industry”. The basic industries are the generator of moneys coming into the area. Broward County has 11 industry groupings that exceed a value of 1.5.

Broward County employment is highly concentrated in administrative and support services, food services, professional and technical services, and ambulatory health care facilities as compared to the national economy. However, it should be noted that the largest increase in employment from 2012 to 2020 is expected in the areas of construction, heavy and civil engineering construction, specialty trade contractors, social assistance, ambulatory health care services, professional scientific and technical services.

Location Quotients calculated from Quarterly Census of Employment and Wages Data for Broward County. Industries with a 1.50 or higher are listed for Broward County.

NAICS 487	Scenic and sightseeing transportation	2.26
NAICS 483	Water Transportation	2.15
NAICS 531	Real Estate	1.97
NAISC 518	Data processing, hosting & related services	1.76
NAICS 488	Support activities for transportation	1.75
NAICS 481	Air Transportation	1.74
NAICS 711	Performing arts and spectator sports	1.72
NAICS 448	Clothing and clothing accessories stores	1.63
NAICS 443	Electronics and appliance stores	1.58
NAICS 442	Furniture and home furnishings stores	1.53
NAICS 517	Telecommunications	1.51

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

The economic framework of the region is significantly different at the County level as shown in the following table, which shows all industry clusters have a location quotient of 1 or greater. The industries that are shaded in yellow demonstrate Broward County's unique clusters. For example, Broward County's NAICS 518, Data processing, hosting and related services indicates a very strong cluster

or location quotient of 1.76 while that industry cluster is weak in Miami-Dade (0.4) and Palm Beach (0.5) suggesting that Broward County is the regional leader for this Cluster grouping. Both Miami-Dade and Broward County have large seaport and water port economies while Palm Beach's airport and seaport are less than the national average.

Table 16: Regional Comparison of Industrial Clusters

Industry Clusters (Location Quotients)	Broward County	Miami-Dade County	Palm Beach County
Base Industry: Total, all industries	1	1	1
NAICS 487 Scenic and sightseeing transportation	2.26	1.18	1.79
NAICS 483 Water transportation	2.15	17.65	0.22
NAICS 531 Real estate	1.97	1.58	2.12
NAICS 518 Data processing, hosting and related services	1.76	0.4	0.55
NAICS 488 Support activities for transportation	1.75	4.02	0.77
NAICS 481 Air transportation	1.74	4.01	0.26
NAICS 711 Performing arts and spectator sports	1.72	1.65	1.62
NAICS 812 Personal and laundry services	1.65	1.37	1.35
NAICS 448 Clothing and clothing accessories stores	1.63	2.1	1.32
NAICS 443 Electronics and appliance stores	1.58	1.88	1.29
NAICS 442 Furniture and home furnishings stores	1.53	1.3	1.45
NAICS 517 Telecommunications	1.51	0.88	1.06
NAICS 446 Health and personal care stores	1.49	1.6	1.31
NAICS 561 Administrative and support services	1.45	1.01	1.29
NAICS 441 Motor vehicle and parts dealers	1.39	1	1.07
NAICS 423 Merchant wholesalers, durable goods	1.37	1.42	0.75
NAICS 611 Educational services	1.33	1.27	0.88
NAICS 451 Sports, hobby, music instrument, book stores	1.32	0.84	0.88
NAICS 533 Lessors of nonfinancial intangible assets	1.31	0.37	1.38
NAICS 424 Merchant wholesalers, nondurable goods	1.26	1.67	0.97
NAICS 445 Food and beverage stores	1.25	1.15	1.34
NAICS 532 Rental and leasing services	1.23	1.12	0.75
NAICS 453 Miscellaneous store retailers	1.22	1.21	1.16
NAICS 621 Ambulatory health care services	1.2	1.1	1.31
NAICS 524 Insurance carriers and related activities	1.17	0.98	0.78
NAICS 721 Accommodation	1.15	1.95	1.33
NAICS 811 Repair and maintenance	1.15	0.96	1.01
NAICS 238 Specialty trade contractors	1.14	0.69	1.11
NAICS 722 Food services and drinking places	1.1	1.03	1.14
NAICS 511 Publishing industries, except Internet	1.09	0.36	0.76
NAICS 541 Professional and technical services	1.08	1.01	1.15
NAICS 562 Waste management and remediation services	1.08	0.55	0.55
NAICS 454 Nonstore retailers	1.08	0.73	0.93
NAICS 522 Credit intermediation and related activities	1.07	1.06	0.83
NAICS 452 General merchandise stores	1.06	0.97	1.09
NAICS 492 Couriers and messengers	1	1.55	0.53

Projected Fastest Growing Industries

Based on data from the Broward County industries with the largest percentage of employment gains are: (Calculated from Quarterly Census of Employment and Wages Data)

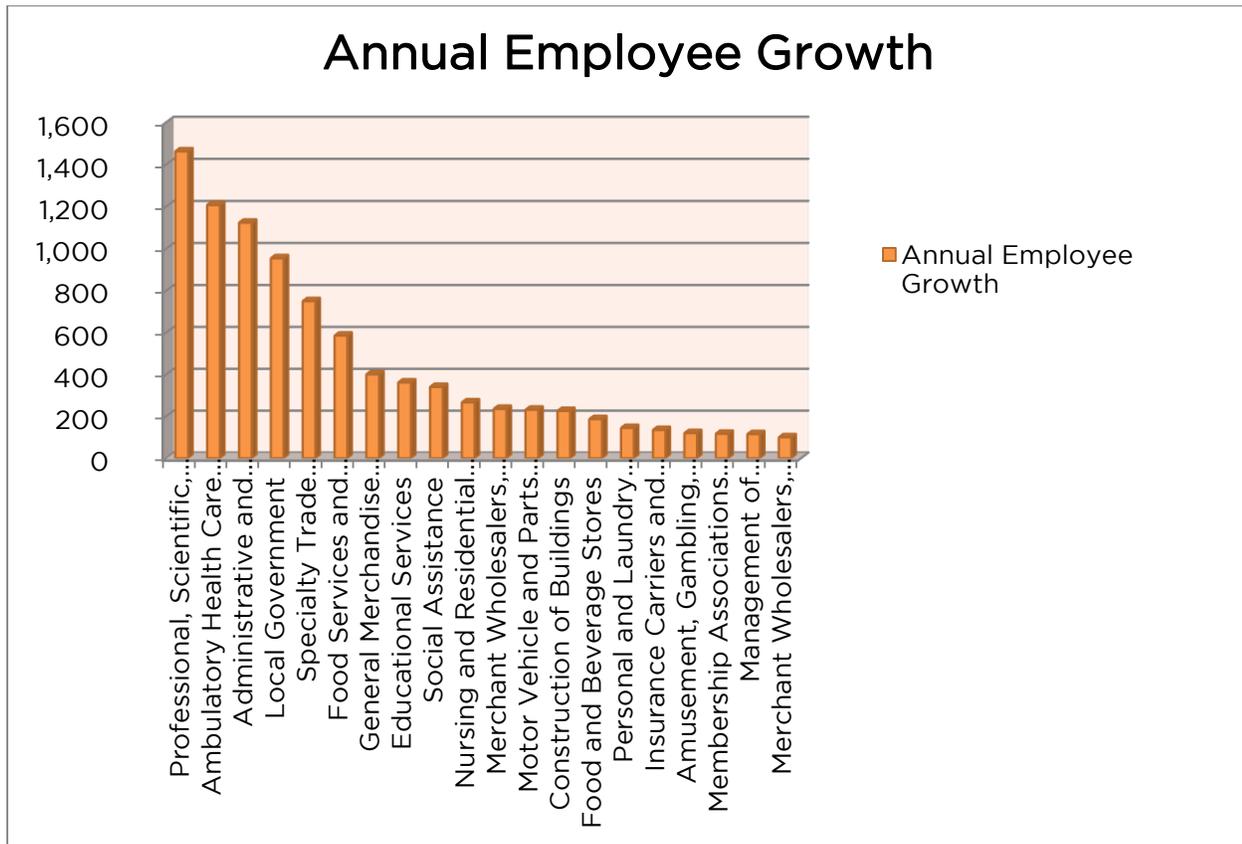
NAICS 561	Administrative and support services	10.11%
NAICS 722	Food services and drinking places	10.02%
NAICS 541	Professional and technical services	7.76%
NAICS 621	Ambulatory health care facilities	6.84%

Table 17: Broward County's Fastest Growing Industries: 2012-2020

Fastest Employee Growth (3 Digit NAICS)	Annual Employee Growth
Professional, Scientific, and Technical Services	1,463
Ambulatory Health Care Services	1,208
Administrative and Support Services	1,124
Local Government	955
Specialty Trade Contractors	751
Food Services and Drinking Places	586
General Merchandise Stores	401
Educational Services	362
Social Assistance	341
Nursing and Residential Care Facilities	267
Merchant Wholesalers, Nondurable Goods	236
Motor Vehicle and Parts Dealers	232
Construction of Buildings	226
Food and Beverage Stores	187
Personal and Laundry Services	145
Insurance Carriers and Related Activities	135
Amusement, Gambling, and Recreation Industries	120
Membership Associations and Organizations	117
Management of Companies and Enterprises	115
Merchant Wholesalers, Durable Goods	100

Source: Florida Workforce Board, Region 22, 2014

Figure 7: Projected Annual Employee Growth by Industry



Source: Florida Workforce Board, Region 22, 2014

Competitive Market Assessment

Retail Sector

In terms of economic activity (Sales) the retail sectors is the largest sector within the Pembroke Pines economy. Based on data from CoStar the City has 261 retail properties with over 8.4 million square feet of retail space. As a way of comparison, that is equivalent to having 8 large regional malls within its boundaries. There has been little change in inventory over the last five year average.

Compared to the County as a whole, Pembroke Pines represents only 8.7% of the County’s total retail inventory which is equal to its population share of the County. Using another metric, the City has roughly 54 square feet of retail per capita which is more than double the national average.

Current rents are slightly below the 5 year average but interviews with realtors suggest the market is strong and has bottomed out of its recession lows. The current vacancy rate of 4.4% is good with available vacancies of 462,848 square feet which represents a three year leasing period using the last 12 month absorption figures or less than 2 years using the 5 year leasing average.

Retail sales command the highest sales price per square foot within the market place. The average sales price for 2013 was \$470 per square foot compared to the City’s 5 year average of \$287 further noting the strength of this market segment. Current asking price of \$193 is slightly below the 5 year average.

The City’s retail sector is largely dominated by 5 regionally oriented centers: Pembroke Lakes Mall (1.13 million SF Regional Mall), Shops at Pembroke Gardens (367,000 SF lifestyle center) and Westfork Plaza (558,000 SF Power Center), Pembroke Commons (304,000 SF Power Center) and Pembroke Crossing (289,000 SF Power Center). Many of its community and neighborhood centers located in the older eastern section of the City are aging and numerous centers are now catering to non-retail clients (small office users for example) and an abundance of smaller non franchise food establishments. Based on interviews with realtors, the market seems to prefer the central to western parts (newer) of the City where demographics and household incomes are higher.

Table 17. Retail Inventory

Retail Inventory	Total	5-Year Average
Existing Buildings	261	258
Existing Square Feet	8,440,591	8,405,425

Source: CoStar, 2014

Table 18. Retail Availability

Availability	Current	5-Year Average
Rent Per SF	\$19.72	\$19.82
Vacancy Rate	4.40%	6.80%
Vacancy SF	372,920	569,992
Availability Rate	5.50%	8.60%
Availability SF	462,848	725,754
Sublet SF	8,081	17,453
Months on Market	23.5	14.6
12 Month Absorption	48,204	44,523
12 Month Leasing SF	188,147	246,091

Source: CoStar, 2014

Table 19. Retail Sector Sales Price

Availability	Past Year	5-Year Average
Sales Price SF	\$470	\$287
Asking Price SF	\$193	\$199
Sales Volume (Mil.)	\$211	\$79

Source: CoStar, 2014

Office Sector

The City is reported to have 1.7 million square feet of office space within 97 buildings. The City has only a few small traditional office parks, with most of its office space spread throughout the City. Compared to the County as a whole, Pembroke Pines only accounts for 2.5% of the County’s total office inventory. One of the last major vacant land parcels available for a Class A office park use is Pembroke Pointe which has excellent I-75 visibility and access.

Pembroke Pointe

The premiere Class A office development site in the City is Pembroke Pointe which is owned by Duke Realty. Pembroke Pointe is a 36 acre site situated along I-75 at Pines Boulevard. Duke Realty has approvals for up to 600,000 square feet of environmentally friendly office space. Based on SPG interviews, Duke Realty plans to develop an office park with four buildings each having 4 stories of 147,414 SF of Class A office space. The first two buildings received approval at the June 18, 2014 City Commission meeting. Pembroke Pointe is ideally located with easy access to Fort Lauderdale International Airport and Miami International Airport. Its strategic location will be a draw for corporate headquarters type businesses.

Pembroke Corporate Center is also being developed by the Altman Group. It is located just west of the Shops at Pembroke Gardens. The Pembroke Corporate Center is being developed as a 280 luxury apartment complex.

The City has a current office vacancy rate of 6.1% which is better than its 5 year average; having 174,000 SF currently available. Absorption has been slow, with an average of 1 year for closings. Using the 5 year leasing absorption, the City has slightly over 2.6 years of inventory.

The past year saw a \$160 SF average sales price for retail space with a current asking price of \$153 SF both higher than the 5 year age.

Table 21. Office Inventory

Office Inventory	Total	5-Year Average
Existing Buildings	97	97
Existing Square Feet	1,722,479	1,709,528

Source: CoStar, 2014

Figure 9. Pembroke Pointe Class A Office Park Sector



Source: City of Pembroke Pines

Table 23. Office Selling Prices

Availability	Past Year	5-Year Average
Sales Price SF	\$160	\$145
Asking Price SF	\$153	\$144
Sales Volume (Mil.)	\$4	\$11

Source: CoStar, 2014

Table 22. Office Availability

Availability	Current	5-Year Average
Rent Per SF	\$24.51	\$25.05
Vacancy Rate	6.10%	7.40%
Vacancy SF	104,366	127,027
Availability Rate	10.10%	9.80%
Availability SF	174,141	166,910
Sublet SF	29,286	10,326
Months on Market	12.1	11.3
12 Month Absorption	12,783	3,899
12 Month Leasing SF	28,630	65,997

Source: CoStar, 2014

Industrial Sector

Given the City's excellent transportation linkages and location, the City has only a small industrial sector. CoStar estimates that the City has 11 existing industrial buildings totaling approximately 527,000 SF. The City has limited vacant land that can accommodate industrial usages all of which are located near US 27 on the City's western boundary.

The City currently has an industrial vacancy rate of 13.6% which is higher than its 5 year average and has 77,500 SF of available industrial space, which is less than a year's inventory based on the 5 year leasing average. The industrial sales price for the last year was \$8 SF slightly higher than the 5 year average while the existing asking sales price is \$48 SF significantly higher than the \$37 SF 5 year average.

Bergeron Park of Commerce and Industry

Bergeron Park of Commerce is a 300 acre (210 developed) industrial and commercial park located in western Pembroke Pines at the intersection of Sheridan Street and 196th Avenue. The Bergeron Park of Commerce has zoning of general to limited heavy industrial (M-1, M-3 and M-4).

Chapel Trail Industrial Park

The Chapel Trail Trade Center and Commerce center are part of the Chapel Trail Planned Unit Development (PUD) and is located just east of US 27 and north of Johnson Street. The park is zoned for up to M-2, medium industrial uses and is home to a wide variety of warehouse and flex space.

Sheridan Palms Industrial Park

The Sheridan Palms Business Park is also part of the Chapel Trail PUD and is located just east of US 27 on Sheridan Street. The park is approximately 10 acres and consists of flex and warehouse space with up to M-2 industrial zoning.

Table 24. Industrial Inventory

Industrial Inventory	Total	5-Year Average
Existing Buildings	11	13
Existing Square Feet	526,821	543,946

Source: CoStar, 2014

Table 25. Industrial Selling Prices

Availability	Past Year	5-Year Average
Sales Price SF	\$8	\$6
Asking Price SF	\$48	\$37
Sales Volume (Mil.)	\$0.5	\$0.8

Source: CoStar, 2014

Table 26. Industrial Availability

Availability	Current	5-Year Average
Rent Per SF	\$5.70	\$6.95
Vacancy Rate	13.60%	11.40%
Vacancy SF	71,510	62,205
Availability Rate	14.70%	13.30%
Availability SF	77,510	72,286
Sublet SF	0	450
Months on Market	57.9	13.2
12 Month Absorption	11,517	-4,862
12 Month Leasing SF	23,470	100,872

Source: CoStar, 2014

Figure 10. Bergeron Park of Commerce



Figure 11: Bergeron Park of Commerce and Industry



Source: City of Pembroke Pines

Pembroke Pines Regional Market

This section describes the overall demographic and regional economic market in which Pembroke Pines and its various businesses, especially retail operated operate within.

45 Minute Drive Time

Strategic Planning Group, Inc. delineated a 45 minute drive time regional market boundary of the City of Pembroke Pines to define the outer limits of its extended market area which goes from Delray Beach to the north to Homestead to the south. The analysis was based on two separate Pembroke Pines intersections: I-75 and Pines Boulevard and University Drive and Pines Boulevard.

The greater Pembroke Pines market is estimated to contain over 4.7 million residents as of 2013 which represented a growth of about 9% since 2000. While this is considered the outer edge, it also correlates with the location of higher end automobile dealerships.

Figure 12. Regional Market Delineation



Source: Nielsen Company (Claritas)

Table 27. Pembroke Pines 45 Minute Drive Regional Market

Pop Facts: Demographic Quick Facts	University Drive and Pines Blvd 0-45 min	I-75 and Pines Blvd 0-45 min
2018 Projection	4,978,382	4,907,461
2013 Estimate	4,709,750	4,638,891
2010 Census	4,549,294	4,477,744
2000 Census	4,171,469	4,109,277
Growth 2000-2010	9.06%	8.97%
Households		
2018 Projection	1,870,651	1,827,600
2013 Estimate	1,770,365	1,728,166
2010 Census	1,713,080	1,671,070
2000 Census	1,580,288	1,545,382
Growth 2000-2010	8.40%	8.13%

Source: The Nielsen Company, 2014

The Primary Market Areas

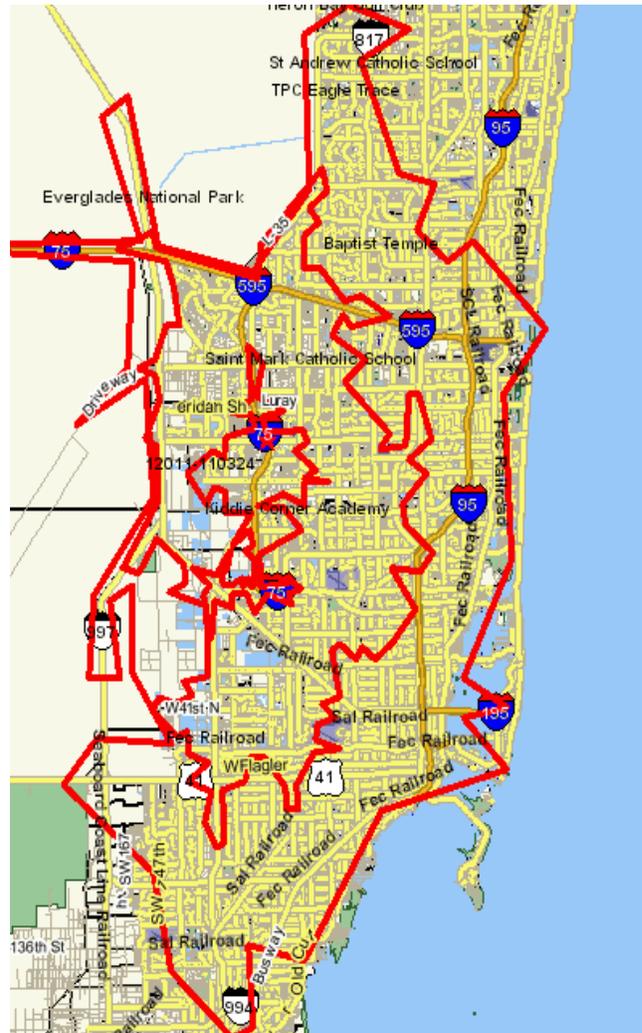
Strategic Planning Group, Inc., commissioned the Nielsen Company (Claritas) to conduct a market analysis of the City based on a 10, 20 and 30 minute drive time of the I-75 and Pines Boulevard intersection. The 30 minute drive time market is believed to best represent the City’s primary market.

30 Minute Drive Time

The mean commuter drive time for Pembroke Pines residents is 29.5 minutes, therefore this study analyzed travel time in more detail at the 30 minute and less drive time. The 30 minute radius goes from Oakland Park on the Northeast to south of the City of Kendall on the South.

The 30 minute drive market of I-75 and Pines Boulevard has an estimated population of 3.3 million people which represents a 15% growth over 2000. It is projected to grow to 3.5 million by 2019. The 30 minute drive time market contains an estimated 1.17 million households which is projected to increase to 1.25 million by 2019.

Figure 13. 10, 20, 30 Minute Drive Market Area



Source: The Nielsen Company, 2014

Table 28. Pembroke Pines 30 Minute Drive Market: Population and Housing

Description	2000 Census	2014 Estimate	%Change 2000-2014	2019 Projection	%Change 2014-2019
Universe Totals					
Population	2,877,786	3,309,538	15.00%	3,522,964	6.45%
Households	1,019,795	1,172,583	14.98%	1,250,560	6.65%
Families	717,759	811,987	13.13%	864,398	6.45%
Housing Units	1,103,740	1,302,721	18.03%	1,381,609	6.06%
Group Quarters Population	48,008	43,948	-8.46%	42,939	-2.30%

Source: The Nielsen Company, 2014

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

The average household income for the 30 minute drive market is estimated at \$62,327 as of 2014 and increasing to \$66,338 by 2019.

Table 29. 30 Minute Market Household Income

Description	2000		2014		2019	
	Census	%	Estimate	%	Projection	%
Total Household Income	1,019,973		1,172,583		1,250,560	
Income Less than \$15,000	195,088	19.13%	198,782	16.95%	197,951	15.83%
Income \$15,000 - \$24,999	140,753	13.80%	156,030	13.31%	158,190	12.65%
Income \$25,000 - \$34,999	132,007	12.94%	138,279	11.79%	144,091	11.52%
Income \$35,000 - \$49,999	163,464	16.03%	163,098	13.91%	172,741	13.81%
Income \$50,000 - \$74,999	180,375	17.68%	196,992	16.80%	206,696	16.53%
Income \$75,000 - \$99,999	93,499	9.17%	120,725	10.30%	132,145	10.57%
Income \$100,000 - \$124,999	47,803	4.69%	73,369	6.26%	84,702	6.77%
Income \$125,000 - \$149,999	22,777	2.23%	39,845	3.40%	49,537	3.96%
Income \$150,000 - \$199,999	20,663	2.03%	44,822	3.82%	51,436	4.11%
Income \$200,000 - \$249,000	10,626	1.04%	14,145	1.21%	20,999	1.68%
Income \$250,000 - \$499,999	8,952	0.88%	20,284	1.73%	23,292	1.86%
Income \$500,000 or more	3,968	0.39%	6,210	0.53%	8,781	0.70%
Average Household Income	\$53,359		\$62,327		\$66,338	
Median Household Income	\$38,867		\$43,572		\$45,859	

Source: The Nielsen Company, 2014

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Workforce

The Broward County unemployment rate for the month of June was 5.3%, 0.1% point higher than previous month. The region's jobless rate was 1.1% point lower than the year-ago rate of 6.4%. Broward County's unemployment rate was 0.9% point lower than the state rate (6.2%) and 1.0% point lower than the national rate (6.3%). The total labor force in Broward County is 1,071,430 of which 56,645 are unemployed residents. Broward County ranked first among all metro areas in the state

for over-the-year growth in government (2,900 jobs) and information (600 jobs) and had the second-highest increase of jobs in construction (4,200). Jobs were also added in major industries including: trade, transportation and utilities (7,600 jobs); professional and business services (3,700 jobs) and leisure and hospitality (3,500 jobs); other services (1,400) and financial activities (1,100 jobs).

Table 30: Broward County Top 30 Fastest Growing Occupations

Workforce Region 22 - Broward County									
Rank	Occupation		Employment		Annual Percent Change GPct	Average Annual Openings			2012 Average Hourly* Wage (\$)
	Code	Title	2012	2020		Due To Growth	Due To Separations	Total	
	SOC	New Title	curr	proj		aopeng	aopenr	aopent mnwage	
1	412031	Retail Salespersons	31,302	34,276	1.19	372	930	1,302	11.80
2	291111	Registered Nurses	14,766	17,159	2.03	299	257	556	33.35
3	434051	Customer Service Representatives	17,065	19,254	1.60	274	480	754	15.05
4	412011	Cashiers	19,904	22,071	1.36	271	968	1,239	10.20
5	353021	Food Preparation & Serving Workers, Including Fast Food	13,080	14,995	1.83	239	381	620	8.86
6	439061	Office Clerks, General	14,083	15,741	1.47	207	246	453	13.17
7	537062	Laborers and Freight, Stock, and Material Movers, Hand	12,129	13,650	1.57	190	390	580	11.35
8	434171	Receptionists and Information Clerks	8,395	9,863	2.19	184	257	441	13.25
9	373011	Landscaping and Groundskeeping Workers	8,083	9,304	1.89	153	142	295	10.88
10	433031	Bookkeeping, Accounting, and Auditing Clerks	11,600	12,744	1.23	143	127	270	17.11
11	132011	Accountants and Auditors	9,582	10,694	1.45	139	202	341	31.70
12	414012	Sales Representatives, Wholesale and Manufacturing, Nontechnical	10,878	11,942	1.22	133	254	387	31.64
13	131111	Management Analysts	3,997	5,040	3.26	130	63	193	36.80
14	311011	Home Health Aides	2,866	3,906	4.54	130	36	166	10.86
15	231011	Lawyers	6,710	7,699	1.84	124	126	250	59.18
16	353031	Waiters and Waitresses	16,687	17,646	0.72	120	846	966	9.84
17	339032	Security Guards	9,418	10,364	1.26	118	147	265	10.38
18	399011	Child Care Workers	5,278	6,218	2.23	118	167	285	9.70
19	472031	Carpenters	5,270	6,201	2.21	116	110	226	21.24
20	232011	Paralegals and Legal Assistants	3,446	4,370	3.35	116	48	164	22.82
21	431011	First-Line Superv. of Office and Admin. Support Workers	8,998	9,913	1.27	114	238	352	24.78
22	319092	Medical Assistants	4,105	4,990	2.69	111	61	172	15.10
23	311012	Nursing Aides, Orderlies, and Attendants	5,819	6,656	1.80	105	73	178	12.11
24	436014	Secretaries, Except Legal, Medical, and Executive	15,826	16,648	0.65	103	212	315	15.37
25	472061	Construction Laborers	3,890	4,695	2.59	101	30	131	13.31
26	471011	First-Line Superv. of Construction and Extraction Workers	3,255	3,987	2.81	92	75	167	29.34
27	372011	Janitors and Cleaners, Except Maids and Housekeeping	11,637	12,362	0.78	91	215	306	10.09
28	252021	Elementary School Teachers, Except Special Education	5,638	6,362	1.61	90	122	212	NA
29	499021	Heating, A.C., and Refrigeration Mechanics and Installers	2,511	3,203	3.44	86	43	129	25.16
30	472111	Electricians	3,244	3,910	2.57	83	86	169	18.94

Source: CareerSource Florida

Broward Workforce Development Board (BWDB)

CareerSource Broward is governed by a 34-member Board of Directors known as the Broward Workforce Development Board (BWDB) and the CareerSource Broward Council of Elected Officials. The CareerSource Broward Council of Elected Officials consists of the Mayor of Ft. Lauderdale, the Mayor of Hollywood and a Broward County Commissioner. Representatives from private business, educational institutions, elected officials and community-based organizations create the makeup of the Board. In this section you will find information on Board membership, monthly activities, financial updates and planning initiatives.

CareerSource Broward

CareerSource Broward (CSBD), the administrative entity of the Broward Workforce Development Board (BWDB), is a federally-funded, locally-controlled organization providing numerous services to employers and job seekers in Broward County. These services are delivered through three one-stop centers and 16 virtual kiosk sites. These virtual kiosks are located throughout Broward County and allow users to log on and access information on CSBD services and programs.

CareerSource Broward has long standing partnerships with thousands of Broward County employers. These partnerships were forged by consistently providing valuable and timely services to the community -- all at no cost. The staff has years of experience in helping businesses grow by assisting them to recruit qualified candidates who can immediately contribute to their bottom line.

Each year, over 250,000 job seekers take advantage of CareerSource Broward services by either placing their résumé in their system or participating in one of their training programs. A business can access the vast database of job seekers simply by placing a job order with them.

The Employer Services provided by CareerSource Broward include:

- Access to Thousands of Resumes
- Local Recruiting
- Pre-Screening Services
- Easy & Convenient Job Postings
- Employed Worker Training Grants
- Grants for New & Expanding Businesses
- Customized Training for existing employees
- No-cost Mass Recruitment Services
- On the Job Training Incentives
- On-site Recruitments
- Workforce Outplacement Services
- Labor Market Information
- Employer Forums
- Career Fairs

Quality Of Life

The City reflects a diverse and high quality of life that meets the needs of families, singles, and senior citizens, providing “big City services” yet staying true to a small-community feel. The City offers:

- Dozens of lushly landscaped parks
- Leisure and recreation opportunities, which include walking and bike paths, golf courses, music events, sports, and outdoor activities
- Varied shopping and restaurant destinations
- Entertainment venues
- Academic excellence in its schools and universities
- Cultural activities and attractions

Accessibility

The City has excellent accessibility to primary highways and interstates that allow for easy travel for business and pleasure, connecting cities and counties throughout South Florida.

Recognition

Pembroke Pines won the National Civic League’s coveted “All-America City Award” in 2004 and was a finalist community in 2003. Pembroke Pines also received an “outstanding achievement award” in the “2005 City Livability Awards” Program, sponsored by the U.S. Conference of Mayors. Many of Pembroke Pines schools have received the “Five Star School Award” from the Florida Department of Education as schools that have shown evidence of exemplary community involvement. The City has ranked #1, twice, as the Best Place to Raise Your Kids.

City of Pembroke Pines has also been honored with numerous other awards and recognitions, including one of the top “100 Best Places to Live,” and one of the “Most Integrated Communities” in South Florida.

Services

Pembroke Pines is known for serving the community’s needs. The City has 47 baseball diamonds, 12.5 football/soccer fields, 24 paddle courts, 11 indoor racquetball courts, 46 lighted tennis courts, and 11 in-line hockey rinks. It has a community center that serves as a meeting place for 70 non-profit organizations, a dinner theater, and three full-service Broward County library branches. To further serve the City’s senior residents, in 1996, the 52,000 square foot SW Focal Point Senior Center was constructed for seniors 60 years of age and older. The center includes a

variety of programs, including 5,000 square feet dedicated to Adult Day Care and Alzheimer’s Day programs. Adjacent to the Center is a 190 affordable housing unit complex for seniors 60 years and older who are capable of independent living.

Parks and Recreation

The City has over 2,000 acres of parks, the largest being the CB Smith Park a full service regional park which includes water slides, tube rides, miniature golf, driving range, paddle boat rides, canoeing, bicycling, roller skating, tennis, racquetball, amphitheater and beach area. The City is also served by four (4) golf courses of which Pembroke Lakes Golf Club is owned by the City.

Arts and Crafts

The City has a large arts and crafts community. It is the home to numerous art events and venues including this year’s 47th Annual Pembroke Arts Festival. The event has grown into one of the most anticipated and enjoyable events to the South Shore Calendar and it could never happen without the countless hours of hard work from volunteers, the generous donations from local businesses, residents, and town boards who make this festival and the scholarships possible.

City Of Pembroke Pines

Arts & Culture Department

The City has its own Arts and Culture Department with the mission to provide a variety of cultural offerings to the community at an affordable cost. The City has four facilities with unique art and cultural programs in the city.

Fletcher Art & Culture Center

Year round art, piano, guitar and drama classes are offered at the Fletcher Art and Culture Center and The River of Grass Arts Park for children ages 5 through adults as well as fine arts and drama camps for children.

Susan B. Katz Theater

The River of Grass Arts Park houses the Susan B. Katz Theater of Performing Arts, a 450 seat venue available for rentals to cultural and other performance groups and it is home to Pembroke Pines Theater of Performing Arts.

Studio 18

Studio 18 in the Pines is a fine art gallery and studio work space for professional artists. Eight shows are curated annually as well as field trips, cultural events, lectures and meetings. Artists may apply for studio work space, exhibit opportunities or to teach adult art classes.

Glass Gallery

The Glass Gallery hosts six exhibits during the year at City Hall featuring local artists, musical entertainment, and refreshments.

Free Events

Many events are free including: the annual Arts and Crafts Festival in the Pines, Studio 18, Glass Gallery art receptions, Symphony of America's annual orchestra concert, the Children's Film Festival, and the Storybook Festival.

The Pembroke Pines Art Guild

The City has an Art Guild, a nonprofit art guild established in 1976 to promote and develop interest in the arts. The guild holds monthly meetings to provide inspiration and opportunities for its members. Members participate in juried and non-juried art shows and there are organized community and charitable projects. The guild is open to all those interested in the fine arts.

In addition, the City holds a number of art and craft festivals throughout the year.

Pembroke Pines Theater of Performing Arts (PPTOPA)

The Pembroke Pines Theater of the Performing Arts (PPTOPA) is the oldest continuously operating community theater in Broward County. PPTOPA was founded in 1993 by a group of dedicated individuals whose goal was to provide low cost, high quality live theater for the community. While technically an "amateur" company whose performers donate their time, PPTOPA productions routinely feature regional professional actors in its productions. Recent casts have included performers who have headlined productions at Stage Door, Curtain Call, New Vista, Tamarac, Caldwell and Actors Theaters and who have been nominated and selected as recipients of South Florida's Carbonell Awards.

City Recognized

The City's Curator of Special Projects was named Best Curator Fort Lauderdale and Palm Beach 2014 and the City received a major National Endowment of the Arts Grant. In giving the grant, NEA chairwomen stated "the city of Pembroke Pines demonstrates the best in creative community development and whose work will have a valuable impact on its community."



Figure 14. Studio 18 Gallery and Exhibit
Source: City of Pembroke Pines

Crime

Pembroke Pines crime statistics report an overall upward trend in crime based on data from 12 years with violent crime decreasing and property crime increasing. Based on this trend, the crime rate in Pembroke Pines for 2014 is expected to be higher than in 2010 indicated on data from Cityrating.com.

The city violent crime rate in 2010 was lower than the national violent crime rate average by 53.59%, and the city property crime rate in Pembroke Pines was higher than the national property crime rate average by 15.95%.

In 2010, the city violent crime rate was lower than the violent crime rate in Florida by 65.46% and the city property crime rate was lower than the property crime rate in Florida by 4.14%.

Pembroke Pines property crime index increased during the recession but has been below Florida's index and has been declining since its recent peak in 2008.

The City's violent crime index has historically been significantly lower than the State and National index and has been decreasing since 2008.

A comparison of historic crime statistics is shown.

Figure 15: Comparison of Crime Statistics

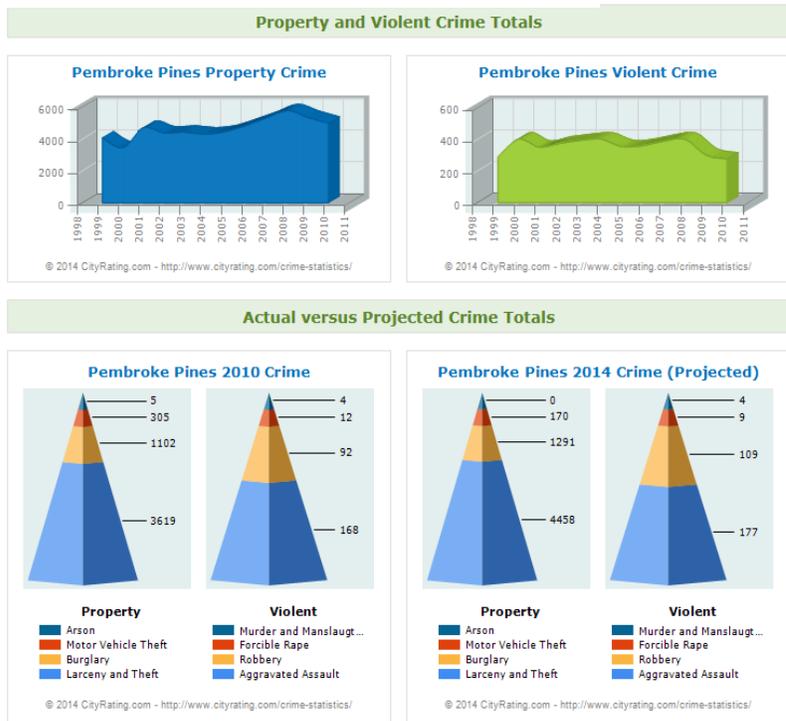
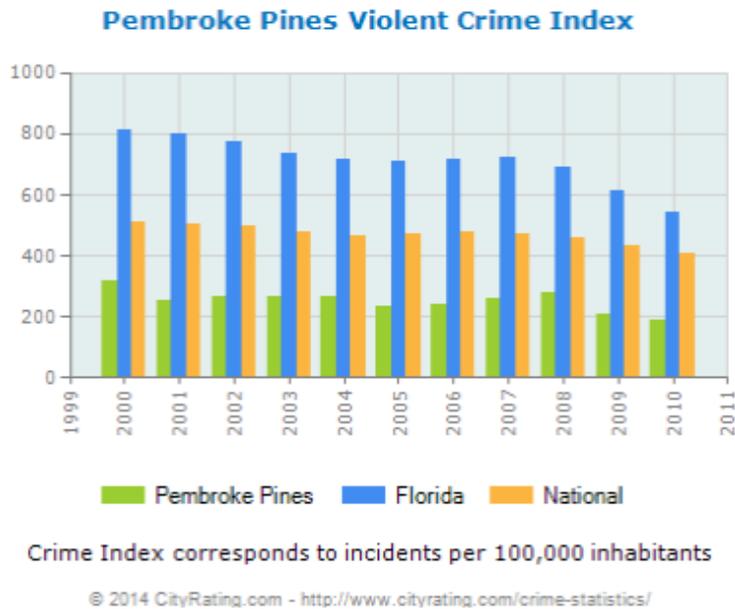
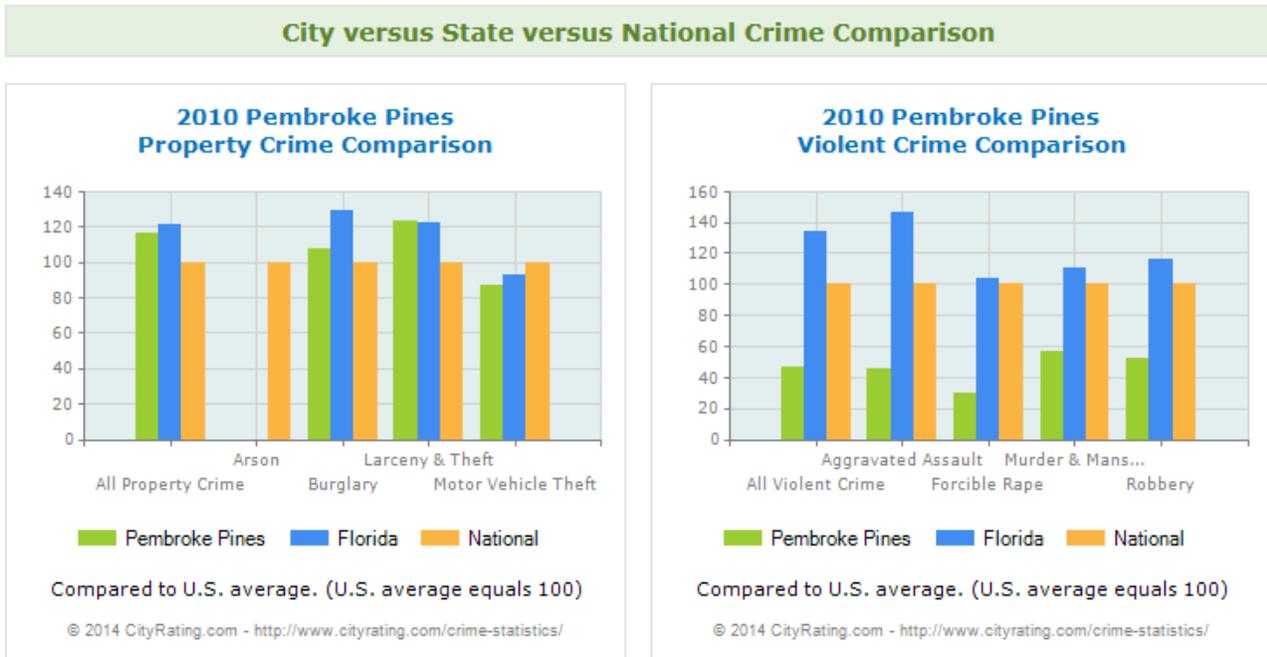


Figure 16: Violent Crime Index



2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Figure 17: Comparison of Property and Violent Crimes by City, State, Nation



* The source of actual data on this Pembroke Pines, Florida crime rate report is the FBI Report of Offenses Known to Law Enforcement for the corresponding year or years. Arson numbers are reported inconsistently. Zero values may indicate the data was not available. The projected crime rate data displayed above was generated from the trends and crime data available from previous years of actual reported data. In this case, the Pembroke Pines crime report data for 2014 was projected from 12 years of actual data. The last year of actual available crime data, as reported above, was 2010.

The FBI cautions the data users against comparing yearly statistical data solely on the basis of their population coverage. The comparisons made herein are thus, only meaningful upon further examination of all variables that affect crime in each reported city, state or other reported jurisdiction.

Pembroke Pines Population Projections

As shown under the discussion on land use, the City of Pembroke Pines is approaching build-out. However, the City is projected to add approximately 11,000 new residents by 2019.

Zillow estimates that overall household size will increase and the City will add an additional 3,528 new households by 2019.

Table 31. Pembroke Pines Population Projections, 2019

Description	Total
Population	
2019 Projection	174,509
2014 Estimate	163,540
2010 Census	154,750
2000 Census	139,439
Growth 2000 - 2010	10.98%
Growth 2010 - 2014	5.68%
Growth 2014 - 2019	6.71%

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Community Assessment

The City of Pembroke Pines is approaching build-out as shown on the map depicting the City's vacant lands. Without major redevelopment the City should reach build out by the end of this decade.

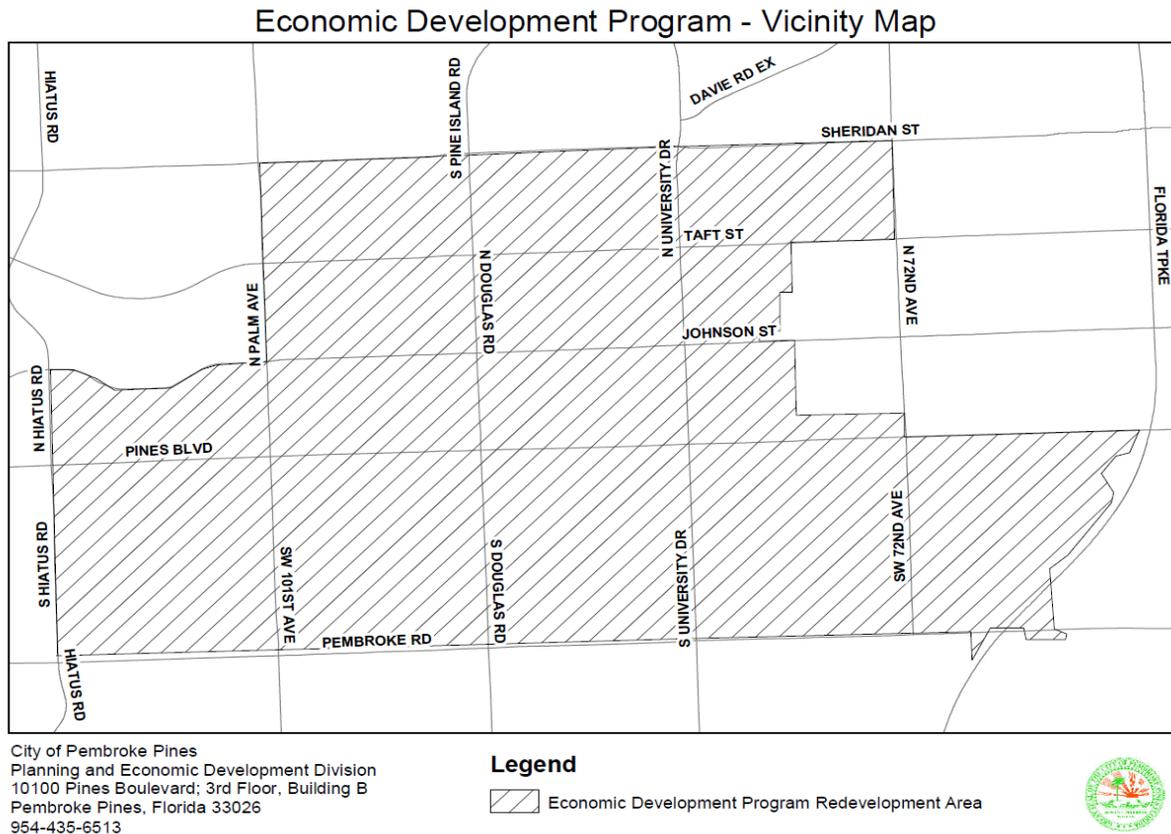
With the exception of City Center, the premier mixed use redevelopment owned by the City, most of the City's vacant land is located west of I-75 although a significant portion of vacant land is located immediately east of I-75 south of the Shops at Pembroke Gardens.

Redevelopment Opportunities

The eastern part of the City is dominated by the Pines Village subdivision, the North Perry Airport and the Senator Howard C Forman Human Services Campus (the old South Florida State Hospital site). It represents the

original City and the area most in need of redevelopment planning. The following map shows the areas originally delineated for redevelopment.

Figure 20. Initial Redevelopment Area



Any redevelopment of the eastern part of the City will need to consider each of these major developments:

Pines Village

Pines Village was the first subdivision in what is now Pembroke Pines. Most of the housing dates back to 1960s. With the expansion of Pines Boulevard, this area experienced the loss of commercial frontage, causing limited parking and lack of room for expansion of the commercial properties facing Pines Boulevard.

North Perry Airport

North Perry Airport is a historic World War II site, currently 511 acres and serves many types of general aviation activities in the local community. With its two sets of parallel, intersecting runways, the longest of which is 3,350 feet, the airport can accommodate smaller multi-engine general aviation aircraft

up to 12,500 pounds. The airport’s terminals are ideal for serving local users as well as those visiting the area.

The airport’s major tenants include four flight instruction schools; those being, Pelican Flight Training Center, ATA, NS Aviation, and Broward College Aviation School. The airport also supports recreational/sport aviation, news and traffic helicopters, Van Wagner Aerial Media, Van Wagner Airship Group (Blimp), Global Air Group (Helicopter Tours), and Aerial Banners activities in the Pembroke Pines and Hollywood areas. Transient and local operations are supported by the airport’s tenants; these tenants are important to the airport’s revenue streams and to the airport’s economic impacts.

North Perry Airport has four active runways in lengths of 3,241 feet to 3,350 feet by 100 feet wide. All runways have full parallel taxiways 40 and 35 feet wide. The airport has a single GPS approach. A study is underway for Runway Safety Enhancements to enhance one runway by 400 feet at each end. It will take several years to complete the Capital Improvements Process, Environmental Assessment, possible Noise Study, Design and Construction.

Two of the airport’s fixed base operators (FBOs) each have 1,000 SF terminals for general aviation. A new airport administration building was completed in 2004. In 2006, 52 T-hangars were constructed. A new Open Bay Hangar with offices is situated on two acres accommodating the metro helicopters opened in 2008. There are plans for additional aircraft storage space in the airport’s FDOT work program, including 103 T-hangars and five conventional hangars ranging from 4,000 to 15,000 square feet.

There still remains over 55 acres in various locations for aviation related light manufacturing facilities. A consultant is currently preparing a Business Plan for the Airport which is scheduled to be completed in September 2014.

Historic and forecast FDOT aviation activity information on file for the airport are as follows:

Table 32. North Perry Airport

North Perry Airport	2009	2014	2019	2029
Based Aircraft	325	344	363	406
General Aviation Ops	167,612	183,881	201,729	242,790
Commercial Ops	N/A	N/A	N/A	N/A
Enplanements	N/A	N/A	N/A	N/A

Source: State of Florida General Aviation System Report, December 2011

The airport’s extensive flight training activity is responsible for approximately 75 percent of total operations. The four flight schools employ a total of 65 instructors and utilize 25 aircraft. Roughly 15 percent of the airport’s other operations are business related. The original 640 acre site now contains a campus of Broward College, Broward County Library, Broward College of Aviation, parks and some commercial buildings along Pines Boulevard. It is reported that a new Wyndham-Microtel Hotel is scheduled to be built inside the southern portion of the airport.

Senator Howard C. Forman Human Services Campus

South Florida State Hospital was a psychiatric hospital built on a 280+ acre site in Pembroke Pines in the 1950s. In the late 1990s, the Florida legislature called for the establishment of the Howard C. Forman Human Services Health Park at the site including a new psychiatric hospital. The State of Florida selected GEO Care in 1998 to construct and to operate the new South Florida State Hospital, the first in the nation to be completely privatized. GEO Care designed, constructed and financed a completely new facility of 335 beds on the same state-owned property. When the new complex was completed in December 2000, the whole hospital was moved to the new site, the only new state civil psychiatric hospital to be built in the state in the last 40 years.

The City of Pembroke Pines maintains a long term lease with the State on 184+ acres with an additional 54.9 acres leased to other state agencies. Of the City’s 184 acres, approximately 31 acres are subject to long term leases executed prior to the City’s lease with the State. As part of its lease agreement with the State, the City developed a conceptual master plan for the site in 2007.

The site contains a large number of obsolete buildings and underused acreage prime for redevelopment which in the short term could be used to house business incubator space. A detailed redevelopment master plan of the site should be considered, given the City’s limited available vacant land for commercial use.

City Center

Pembroke Pines City Center is a master planned mixed-use development within the City of Pembroke Pines, Florida. The project site is bound on the north by Pines Boulevard and on the east by Palm Avenue. The site is adjacent to the current City of Pembroke Pines municipal complex. The City Center development will feature 1,365 residential units, up to 350 hotel rooms and mixture of commercial and office uses. The City is partnering with a master developer for the commercial construction on the property.

Residential construction has already begun on site. The first 425 units are already available for lease. In addition, the City has made the existing City Hall parcel available for redevelopment and anticipates a combination

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

of office, residential and hotel uses on that heavily traveled corner.

Civic Center / City Hall Property

Directly south of the City Center property is the recently approved Civic Center/ City Hall project. The facility will feature a great hall that can be configured for performance, banquet, or exhibition use. In addition, the

building will have numerous meeting spaces. The new Pembroke Pines City Hall will be located above the flexible great hall space making the building an active place for commerce. A new commission chambers, art gallery, outdoor plaza and inclusive park will round out the development of the Civic Center / City Hall Property. The City estimates the facility will be completed fall 2016.

City Center Layout

Figure 21. City Center Master Plan



Figure 22: Civic Center Rendering



Other Opportunities

Expansion of Shops at Pembroke Gardens

The Shops at Pembroke Gardens is a 367,000 SF Lifestyle Retail Center that is approaching build-out. The AT&T parcel immediately east of the Shops is currently underutilized as a light industrial holding area, which if moved would increase the development potential of the area by several acres with the possibility of developing a stronger entertainment district for the City.

Figure 23. Shops at Pembroke Gardens



The Broward Correctional Institution Property

The Broward Correctional Institution for women which opened in the late 1970s shuttered its doors in May 2012 due to a declining inmate population and budget cuts. The City of Pembroke Pines was recently announced as the successful bidder for the 66 acre site which is located just east of U.S. 27 and north of Sheridan Street.

Figure 25. The Broward Correctional Institution Property



South Florida Processing and Distribution Center

Located in the western portion of the City at SW 160th Avenue and Pines Blvd, the 334,000 SF processing and distribution building, located on 26.5 acres, is closing and moving to a site outside of the City. The existing site needs to remain as office or light industrial use but may require the removal of the existing zoning overlay to achieve its highest and best use.

Figure 24. South Florida Processing and Distribution Center



US 27 Corridor

U.S. 27 is becoming a major transportation corridor and key player in South Florida commerce. The Florida Department of Transportation (FDOT) is studying whether to transform the road into a major rail corridor, where freight trains full of cargo from Asia and South America travel on a proposed new rail line along the highway from Port Miami to inland distribution centers in western Palm Beach County.

U.S. 27 could function as a 'rail bypass,' diverting freight trains from the Florida East Coast and CSX railroads to relieve traffic at railroad crossings and to make room for more passenger trains. The idea to transform U.S. 27 comes as several efforts are converging, prompting a growing demand to move freight and passengers by rail.

For one, improvements at Port Miami, including dredging a deeper channel to accommodate larger ships, are expected to significantly increase the amount of goods coming into the port. The increased freight

and cargo could head to three distribution centers around Lake Okeechobee, where some 50 million square feet of warehouse space is planned.

Already a heavily used truck route, U.S. 27 would see an explosion of truck traffic — an increase of 21 to 27 percent between Interstate 75 in Broward and State Road 80 in Palm Beach, according to FDOT. With or without a new rail line, FDOT projects that U.S. 27 would have to be widened to six lanes between Griffin Road in Broward County and Old U.S. 27 in Palm Beach County to accommodate the distribution centers.

Hospitals

Hospitals and the entire health care industry are one of the fastest growing economic sectors nationally. The City has three hospitals within its boundaries (Memorial Hospital Pembroke Pines, Memorial Hospital West and the South Florida State Hospital) as well as six large urgent care centers. Located immediately south of the City is Memorial Hospital Miramar, and to the north is the Cleveland Clinic Hospital. Both Memorial Hospital Pembroke Pines and Memorial Hospital West are land locked.

Of the three hospitals, Memorial Hospital West, which is currently undergoing on site building renovations, has the greatest potential for future expansion. The logical expansion would be toward Pines Blvd (giving the hospital visibility from Pines Blvd).

Competitive Position

As demonstrated by the City’s regional dominance in retail including the location of most of the major automobile dealerships in South Florida, the City has exceptional regional accessibility and visibility. The City also has excellent housing stock and its quality of life, including education, abundance of recreation and park space, low crime and community services (especially for children and seniors), has established the City as a premiere location for families.

The City possesses a large and diversified labor base and its diverse ethnicity is well suited to the regional business market. The major deterrent to future economic growth is the City’s limited vacant land especially as it relates to potential Class A office space. The

City of Miramar to the south, is the main competition for office space. Historically, it appears that the City of Miramar focused on office development while Pembroke Pines was more focused on family housing and retail developments.

The eastern portion of the City is built out and opened to redevelopment to increase density and create suitable commercial and mixed use parcels. This is also the eastern gateway into the City and needs redevelopment. The redevelopment of the central part of the City with the City Center Project should greatly assist by being a catalyst in moving development visibly eastward which should benefit the older sections of the City.

Competitive Tax Position

Pembroke Pines collected the third (3rd) largest ad valorem revenues within Broward County as shown below.

Table 33: Top ten (10) Municipal Ad Valorem Tax Generation

Taxing Authority	2012-2013		2013-2014				2013-2014		
	Millage Rate	Taxes Levied	Millage Rate	Taxes Levied	Ranking	% Change	% Residential	% Commercial	% Industrial
Ft. Lauderdale	4.1193	\$97,265,832	4.1193	\$101,522,235	1	4.38%	67.60%	23.90%	4.50%
Hollywood	7.4479	\$74,976,845	7.4479	\$77,897,100	2	3.89%	68.20%	19.00%	6.10%
Pembroke Pines	5.6368	\$47,990,517	5.6368	\$50,185,607	3	4.57%	74.70%	18.40%	1.90%
Miramar	6.4654	\$42,819,364	6.4654	\$44,960,754	4	5.00%	72.60%	12.90%	8.10%
Pompano Beach	4.9700	\$43,135,298	4.8712	\$43,808,061	5	1.56%	56.70%	15.90%	19.80%
Plantation	5.6142	\$37,807,730	5.6142	\$39,120,016	6	3.47%	68.06%	22.40%	2.10%
Coral Springs	4.5697	\$34,033,295	4.5697	\$35,372,635	7	3.94%	73.70%	18.70%	3.50%
Town of Davie	4.8122	\$31,632,402	5.0829	\$34,606,191	8	9.40%	69.20%	18.00%	7.00%
Deerfield Beach	5.1856	\$24,987,375	6.2317	\$31,204,795	9	24.88%	55.50%	20.70%	15.10%
Sunrise	6.0543	\$29,420,035	6.0543	\$30,729,078	10	4.45%	48.00%	33.90%	8.20%

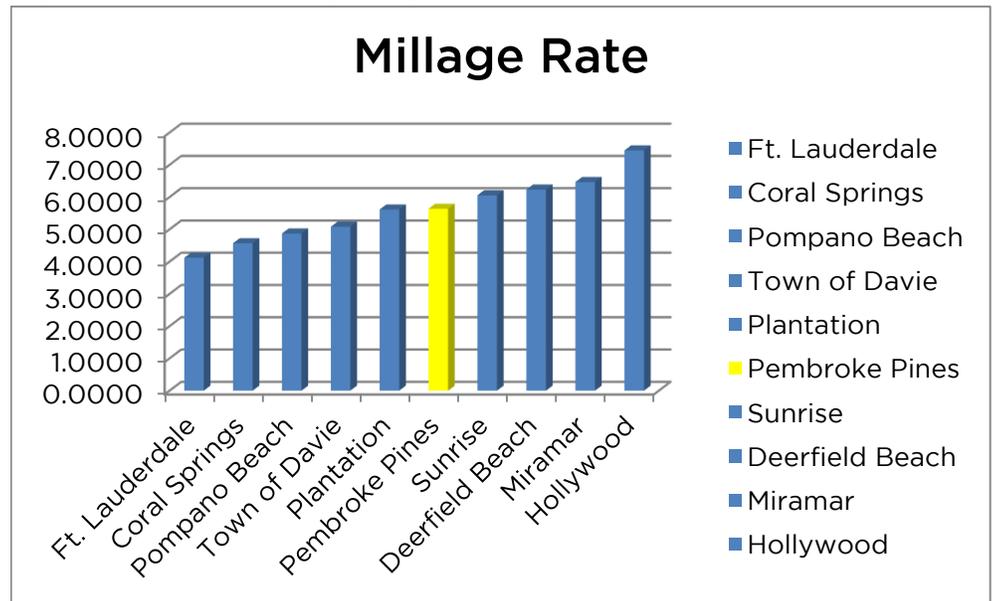
Source: dor.myflorida.com; Strategic Planning Group, Inc., 2014

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

The City's existing millage rate is competitive compared to the other high ad valorem generating cities in Broward County and significantly lower than the City of Miramar which is its closest competitor.

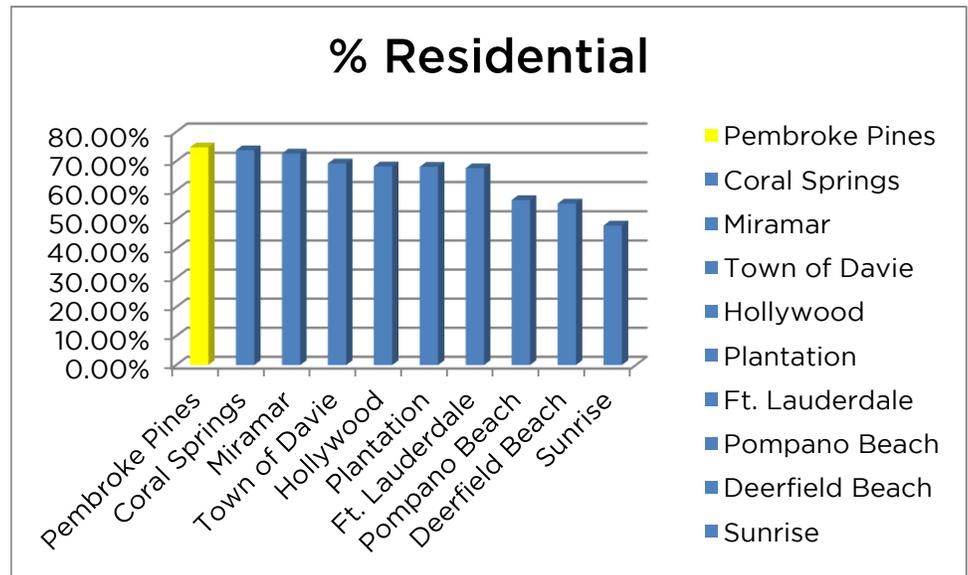
Pembroke Pines has the highest percentage of its ad valorem taxes generated by residential properties as compared to commercial or industrial property taxes.

Figure 26: Comparative City Millage Rates



Source: dor.myflorida.com; Strategic Planning Group, Inc., 2014

Figure 27: Percentage of Tax Base Generated by Residential Properties



Source: dor.myflorida.com; Strategic Planning Group, Inc., 2014

Benchmarks

Benchmarking or comparing what other communities are doing with respect to economic development can be useful in evaluating Pembroke Pines' role in economic development. SPG evaluated and benchmark four predominately residential communities that experienced significant growth since the 1990s: Ormond Beach, Cape Coral, Deltona, and Port St. Lucie. All four communities have different histories and economic development outcomes yet they demonstrate the importance of achieving political consensus and implementing economic development strategic plans; the importance of working with developers and the need to create incentives to promote and implement EDSP strategies.

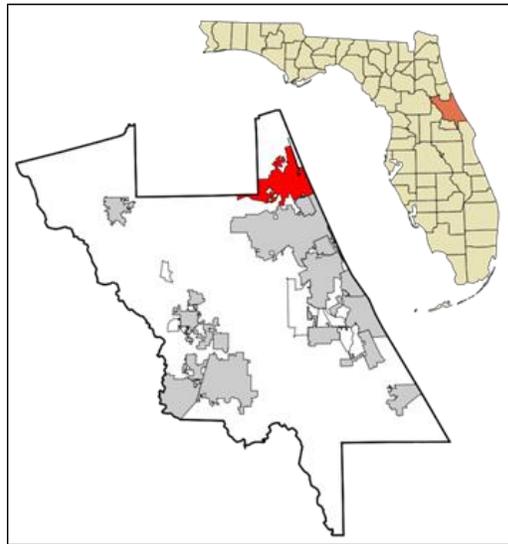
City of Ormond Beach

City of Ormond Beach is located near the very crossroads of Central Florida's High Tech Corridor, I-95 and I-4, and has become known as Central Florida's preferred business address. The City is almost equidistant to Jacksonville and Orlando, as shown in the following graphic.

Ormond Beach is the fourth largest city in Volusia County. The western part of the County is growing faster than the eastern part; and the City of Daytona Beach experienced a negative growth or a loss of population between 2000 and 2010.

Ormond Beach has a higher median age reflecting its large retirement population, and the mean income of \$84,000 is significantly higher than the comparative cities in this section and the State. The residents of Ormond Beach are highly educated with approximately 94 percent having a high school or higher education, of which, 32 percent have a higher educational attainment.

Figure 28. Ormond Beach location within Volusia County



Source: en.wikipedia.org/wiki/Ormond_Beach,_Florida

Economy Summary

- Ormond Beach's local economy has been, and is forecasted to remain, relatively stable during the near future. The City has a strong existing manufacturing base to build on.
- The hospitality industry plays a major role in both the Volusia County and City of Ormond Beach economies. According to State statistics there has been a slight increase in overall lodging rooms within the City.
- There are limited, but still significant retail opportunities for the downtown area as well as the City as a whole.
- As of 2011, the City of Ormond Beach had the third lowest operating tax millage rate and the lowest monthly utility fees in the County.

Figure 29. Ormond Beach Regional Location



Source: Strategic Planning Group, Inc.

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Historically, the City's tax base and resultant revenue generation has been heavily dependent upon residential development which accounted for 74 percent of the City's tax revenues. In addition, only 449 acres of undeveloped commercial/industrial land existed within the City for future commercial/industrial development.

The plan's major goals are focused on business retention/expansion and the recruitment of business within the City of Ormond Beach. The third goal is orientated toward strengthening the downtown Central Business District (CBD), as a means for anchoring the City, expanding the community's sense of place and attracting visitors. It also focuses on expanding retail opportunities throughout the City.

The implementation of the 2011-14 SEDP prepared by SPG Inc. will result in a positive cost benefit ratio for the City. The success of the 2006-2011 SEDP increased the amount of commercial/industrial land uses which generate greater revenues, i.e. property, franchise, sales taxes than required municipal services/costs. The analysis of the implementation of the 2006-11 SEDP revealed that initiatives of the Plan assisted businesses in retaining and growing 995 jobs with private

capital investment of \$30 million. This occurred during a period of a national and regional recession.

The new 2011-14 SEDP is designed to encourage a cooperative public/private approach to accomplishing the goals, objectives, and action steps, related to business retention/expansion, business recruitment, and retail/downtown redevelopment.

Summary:

Size: 39 square miles

Type of City: Traditional incorporation (as opposed to Developer originated)

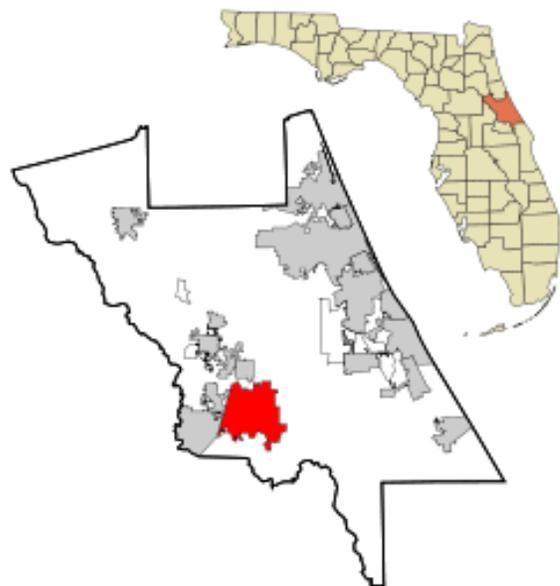
Problems: Limited developable land. Worked with developer to annex new acreage to City to expand its commercial and industrial offerings. Overcame governance issues by preparing a Strategic Economic Development Plan which became the Public focus on expanding the City's non-residential tax base. Created an Enterprise Zone within Airport designed lands as a means to promote development interest at the Airport

City of Deltona

The City of Deltona is located within the western part of Volusia County across the St. Johns River from Seminole County, one of the largest office sectors within the Orlando MSA. The City lays approximately half way between the City of Orlando and Daytona Beach. The 2010 Census reports that the city had a population of 85,182. By population, it is the largest city in Volusia County, and the second-largest city in Central Florida. It is a principal city of the Deltona-Daytona Beach-Ormond Beach, Florida Metropolitan Statistical Area, which was home to 494,593 people in 2010.

Founded in 1962 as "Deltona Lakes," the City, like Pembroke Pines and Port Charlotte, was a platted, master planned 41 square mile community developed by Mackle Brothers, Inc. While originally planned as a retirement community, during the 1990's and early 2000's it became the workforce housing center of the sub-region reaching a population of 50,828 by 1990. This rapid development of housing units since its opening in 1962 led to an almost entirely residential cityscape. The City is bounded to the north by I-4 which allows for

Figure 30: Deltona Location within Florida



2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

quick access to Seminole and Orange County's employment, shopping and entertainment.²

Because the city is close, in proximity to Orlando, it is generally considered to be an "edge city" of the Orlando metropolitan area; the City is also a part of the Orlando-Deltona-Daytona Beach, FL Combined Statistical Area, which was home to 2,818,120 people in 2010.

The City's major economic center is the SR 472 Activity Center. It is part of a large 1,824 acre Development of Regional Impact covering the four corners of the I-4/SR 472 intersection. Two cities (Deltona, Deland) plus an unincorporated area of the County fall within its boundaries. Deltona contains the large land holdings at approximately 900 acres.

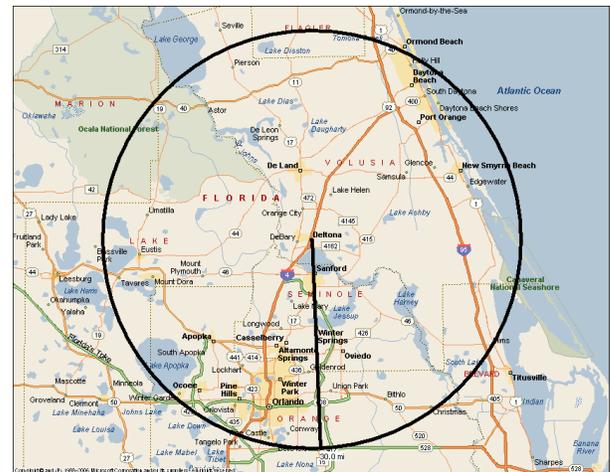
The SR 472 Activity Center as currently planned contains:

- 5.7 million square feet of Warehouse/Industrial
- 4.4 million square feet of Office
- 1.8 million square feet of Retail
- 266 hotel rooms

While there is some entertainment/retail development planned for the site, little of the non-residential development has progressed. Part of the City's problem in developing the site was caused by the publicly prepared area-wide Developments of Regional Impact (DRI) which failed to ensure transportation entitlements that would allow for its development. Further, because this was a publically prepared DRI, its implementation is left to the underlying land owners and the two cities (including Deltona, Deland) that have jurisdiction within this Activity Center.

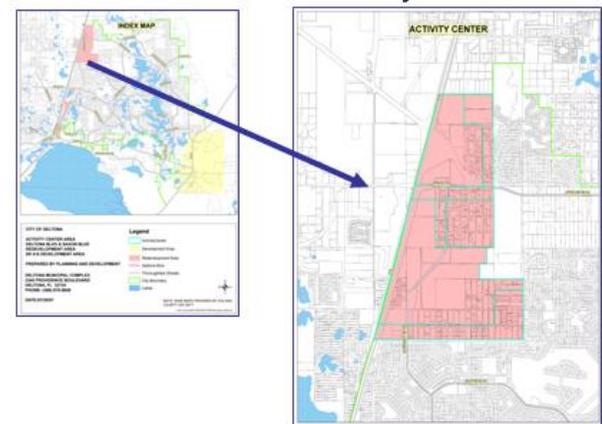
While the "Great Recession" has potentially affected the development of Activity Center, much of the original delay was due to limited transportation entitlements and multiple land ownership and the constant competition to challenge the internal land use allotments. Furthermore, none of the land owners had non-residential experience.

Figure 31: 30 Mile Radii of Deltona



Source: Claritas, Inc, 2007; FIOG 2012

Figure 32: SR 472 Activity Center



Source: Strategic Planning Group - Deltona SEDP 2007

Summary:

Size: 41.1 square miles

Developer: Mackle Brothers, Inc. / Deltona Corporation

Start of Development: 1962, City Charter 1995

Type of Development: Platted Residential Development

Problems: As originally planned, limited non-residential land and no City Center. Inability to develop its Activity Center was caused by lack of underlying ownership commercial development experience, publically produced DRI with multiple land owners, and failure to secure needed transportation entitlements.

² Strategic Planning Group - Deltona Strategic Economic Development Plan 2007

City of Port St. Lucie³

Incorporated in 1961 by the General Development Corporation (GDC), the City was originally intended to be a bedroom and retirement community. Prior to going bankrupt in 1990, GDC had largely effectuated its plan, platting approximately 80,000 quarter acre single family lots served by a limited transportation network, undersized commercial areas, well water and septic tanks. In the early 1990's, Core Communities (CC), acquired, and began planning on what would become St. Lucie West. Originally, St. Lucie West was planned to have contained about 14,000 homes over a 20-year period on 7 square miles. But after realizing the community's strategic position, they began developing it into more than just a residential area. CC began building business sectors and places where people could have fun. That resulted in 7,000 jobs being brought to the small town, helping it into its boom during most of the early 2000's. As configured today the City contains 76.7 square miles of land/water.

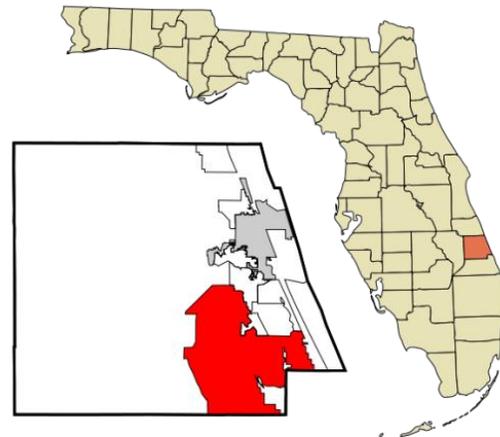
There were several disadvantages of the GDC design:

- The City had no central core or traditional downtown
- Most residents had to work, shop and find entertainment outside of the City
- Lead to a flat tax base
- Reduced levels of public services
- A diminished quality of life

Not happy with the City's original design, the community embarked on a bold journey to retrofit the "original" City and enable economic development by:

- Constructing a centralized water and wastewater utility system for \$500 million
- Comprehensive transportation improvements
- Recruitment of targeted industries
- Annexation of adjacent agricultural lands for the development of master planned mixed use communities
- Designation of a Community Redevelopment Area
- Strong political will

Figure 33: Port St. Lucie Location within Florida



These initiatives and investments, especially the utility system, enabled the infill of the original City and the scores of new developments which have transformed this former bedroom and retirement community into a "City for All Ages."

Core Communities came into the picture and had property annexed into the City to provide a physical and cost-effective location for job creation and commercial development because such a location was not readily available within the existing City as a result of GDC's design. This new area is called "Tradition."

In 2008, Tradition and Core Communities welcomed the Florida Center of Innovation, a research laboratory and campus, which is home to the 100,000 square foot Torrey Pines Institute for Molecular Studies and the Vaccine & Gene Therapy Institute. This campus alone is projected to bring more than 30,000 jobs to the city of Port St. Lucie, alone. In 2012, Digital Domain Media Group's sister company and animation studio Tradition Studios relocated to Port St. Lucie.

The City is home to New York Mets spring training, the St. Lucie Mets Florida State League team and the Mets rookie level team in the Gulf Coast League. All three play at Digital Domain Field. The Treasure Coast Galleons, a semi-pro soccer team also calls Port St. Lucie

³ The data for Port St. Lucie came from discussions with EDO staff and some sections taken directly from the City's website and Wikipedia (<http://en.wikipedia.org>)

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

its home. Florida Atlantic University has its Treasure Coast campus in the city. There is a golf complex, the PGA Village with 54 holes of golf, a learning center and a historical center. The City also hosted the Ginn Classic at Tesoro, the City's first ever PGA Tour Event, in 2007. Port St Lucie is the home of world renowned Mixed Martial Arts School, American Top Team Port St Lucie campus. Port St. Lucie is also home to Local Skate Team. Port St. Lucie is also the home of the 2009 & 2011 National Champions in Pop Warner Football Pop Warner Little Scholars. The Daytona Beach Racers of the Stars Football League have relocated its franchise to Port St. Lucie, and will begin playing in the 2012 season.

The Tradition Research Park is now home to the 100,000 square foot Torrey Pines Institute of Molecular Studies and will house many more ancillary companies who provide support service to the bio-medical industry. Incentives played a big role:

- \$40 million- City of Port St. Lucie
- \$32 million- State of Florida
- \$10 million- St. Lucie County
- \$6.5 million- in-kind from Florida Atlantic University
- 20 acres donated by Tradition developer Core Communities

Other components of Traditions include:

- The Landing- 600,000 square foot retail center
- Tradition Square- a collection of local and regional shops and restaurants
- Village Pointe- 350,000 square foot of home furnishing outlets and amphitheater
- Regional Mall- 1.3 million square foot regional mall is planned
- Tanger Outlet Mall- 400,000 square foot has been announced

In an effort to achieve sufficient and long lasting results for the City, the City also created a 2,000 acre Community Redevelopment Agency (CRA). The CRA is envisioned as a central gathering place that creates an identity for the city as well as provides entertainment and economic opportunities. The area is planned to include a variety of development districts and connective open space to better serve Port St. Lucie's current and future population.

Summary:

Size: 76.7 square miles

Developer: General Development Corporation

Start of Development: 1959

Type of Development: Platted Residential Development

Problems: As originally planned, limited non-residential land and no City Center. The City's primary success was the annexation of lands west of I-95 and the creation of "Traditions." These lands/developments were developer-driven (Core Communities) by those who understood commercial development. Once conceived, a strong private public partnership was formed to transform this workforce bedroom community for Palm Beach County into a growing economic entity.

City of Cape Coral⁴

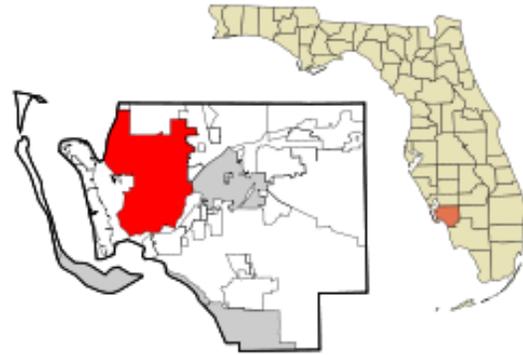
The City of Cape Coral is located in Lee County. Founded in 1957 and developed as a master-planned, pre-platted community, the city grew to a population of 154,305 by the year 2010. With an area of 120 square miles, Cape Coral is reported to be the largest city between Tampa and Miami. It is a principal city in the Cape Coral – Fort Myers, Florida Metropolitan Statistical Area. The population estimate for the statistical area was 618,754 in 2010 according to Census estimates. The City is known as a "Waterfront Wonderland", since, with over 400 miles of navigable waterways, Cape Coral is reported to have more miles of canals than any other city in the world.

Cape Coral was founded by real estate developers Leonard and Jack Rosen of the Gulf American Corporation (GAC), were responsible for the planning and development of this pre-platted community. The City incorporated in August 1970, and its population continued to grow rapidly. In its early years, Cape Coral was known as a community with many retired residents. This changed with a population and construction boom in the 1990's, which brought in younger families and professionals. Twenty percent of the population is seasonal residents. Today, the City has a wide variety of businesses, retail shops and restaurants on its major arterials: Cape Coral Parkway, Del Prado Boulevard, Santa Barbara Boulevard and Pine Island Road. As of 2010, there were 78,948 households in the City, out of which 23.0% were vacant.

The economy in Cape Coral is based on local government services, health care, retail and real estate/construction. The City's Economic Development Office promotes and incentivizes business relocation to Cape Coral. The City's top five employers were the Lee County School District, Cape Coral City Hall, Publix Supermarkets, Cape Coral Hospital and Wal-Mart.

Due to its canals designed for residential orientation, non-residential development has largely been aggregated along major roads. Complicating development is direct access to Ft. Myers which is limited by two bridges. A recently (2012) build-out study suggests that

Figure 34: Cape Coral Location within Florida



the City has a potential for 200 million square feet of non-residential uses. Based on a quick review of the City's land use and zoning, the City has few aggregated parcels of 25 plus acres suitable for business park type development. One such parcel was designated as the Veterans Zone site for the new 220,000 square foot Veterans Hospital.

Summary:

Size: 120 square miles

Developer: Gulf American Corporation

Start of Development: 1957

Type of Development: Platted Residential Development

Problems: As originally planned, it was a canal oriented retirement center with limited non-residential land and no City Center. The City grew significantly with the addition of a new bridge to provide additional access to downtown Ft. Myers and like Pembroke Pines became the workforce housing center for the County. Its non-residential land has centered on its major road corridors and within its limited urban service district and land assembly issues, the City has only two limited industrial parks and the new Veterans Investment Zone as major areas for business development. As no large tracts are available and access to the larger region is limited, economic development efforts are limited. Lessons learned are to aggregate sufficient land for new business park development at locations which are market friendly and hopefully associated with experienced commercial developers.

⁴ http://en.wikipedia.org/wiki/Cape_Coral,_Florida

Benchmark Summary

Four residential communities were benchmarked against Pembroke Pines.

City of Ormond Beach

- Ormond Beach’s local economy has been, and is forecasted to remain, relatively stable during the near future. The City has a strong existing manufacturing base to build on.
- The hospitality industry plays a major role in both the Volusia County and City of Ormond Beach economies. According to State statistics there has been a slight increase in overall lodging rooms within the City.
- There are limited, but still significant retail opportunities for the downtown area as well as the City as a whole.

As of 2011, the City of Ormond Beach had the third lowest operating tax millage rate and the lowest monthly utility fees in the County.

City of Deltona

- Limited non-residential land and no City Center
- Inability to develop its Activity Center due to lack of commercial development experience
- Publically produced DRI with multiple land owners
- Failure to secure transportation entitlements

City of Port St. Lucie

- Limited non-residential land and no City Center
- Successful because the City annexed lands west of I-95 and the creation of “Traditions”- contains bio-medical companies, regional mall, outlet mall, misc. other retail and housing
- Developer driven
- Strong public-private partnership formed-over \$88.5 million invested in incentives

City of Cape Coral

- Canal oriented retirement community with limited non-residential uses and no City Center
- Workforce housing center for Lee County
- Limited industrial parks
- No large land tracts available for new business park development

2

TARGET INDUSTRIES AND INCENTIVES

In having a discussion on the appropriate target industries for Pembroke Pines it is important to provide some perspective regarding the correlation between the Six Pillars Broward Plan and the City of Pembroke Pines Economic Development Strategic Plan (EDSP). The recommendations in the EDSP were developed to complement the Six Pillars.

Six Pillars Broward Community Plan⁵

In 2011, Broward County began the process of developing a strategic visioning plan through the year 2030, using the Six Pillars framework of the Florida Chamber Foundation as a strategic planning tool. More than 300 community volunteers from organizations throughout Broward County participated in the process, aligning community, government, economic development and education organizations toward common goals, the City of Pembroke Pines is a participant. The 2030 VISION is based on Prosperity and High Paying Jobs, Vibrant Communities, and Global Competitiveness.

The Six Pillars framework identifies the critical factors determining Florida's future, those being:

Talent Supply and Education: In order to foster a workforce prepared to meet the needs of employers in the future, Broward County must have a skilled workforce that is well educated, with skills that match the needs of employers.

Innovation and Economic Development: Competitiveness and prosperity in the 21st century will be based on technology, knowledge and innovation. The system transforming innovation to new economic growth includes private and public research and development (R&D); investment for new ideas, technologies and processes; research commercialization; and entrepreneurship.

Infrastructure and Growth Leadership: This Pillar highlights the fundamental contributions of factors such as transportation, water and environmental protection and land use to a vibrant economy. Smart and timely investments in strategies tied to sustainable infrastructure targets will result in economic prosperity for all of Broward County.

Business Climate and Competitiveness: When making decisions about where to locate and

expand their business, owners and executives make their decisions based on the attractiveness of a particular location in regard to business climate. To ensure economic success, we must constantly monitor our business climate and consider policy changes that secure our position among the most business-friendly locations that businesses may consider.

Civic and Governance Systems: Even the most ardent supporters of free markets recognize the role of structures in place to deliver services, set rules that organize business and society, and provide vehicles for the public to engage in, influence, and change the way society works. It is the goal in this plan to make Broward County a national leader in ethical governance, engage the community in civil society and civic responsibility including voting, and encourage efficiency and collaboration among governments and regulatory authorities.

Quality of Life and Quality Places: Our future depends on the preservation or enhancements of a wide range of integrated elements that together express the robustness of our culture and the positive perceptions of those things that make us healthy, safe, comfortable, secure and involved.

Target Industries

Target industry businesses bring quality job growth to a community thus making a significant economic contribution. Most communities use the State's measurement of paying an average annual wage that is at least 115 percent of the state, metropolitan statistical area (MSA), or local average wage in order to qualify as a target industry. Communities select the types of target industries that aid in providing economic diversification; pay higher wages; retain young professionals; enhance economic growth; meet a variety of skill sets; and leverage local assets and infrastructure.

Numerous economic development groups, including State, regional and county organizations within the overall market area, have prepared detailed target industry studies that can directly assist the City in its economic development efforts. Most of the industries discussed below are referred to as "Target Industries" which for this report means "value added". A City, unlike a state, region or county, is more dependent on property taxes for

⁵ Source: The Broward County Six Pillars Community Plan 2014 Report to the Community

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

revenue; therefore, a city's target industries or businesses also include retail.

The following is an overview of the target industry and incentive programs that are available to Pembroke Pines:

State of Florida/Enterprise Florida

Enterprise Florida, Inc. (EFI) is a public-private partnership serving as Florida's primary organization devoted to statewide economic development. EFI's mission is to facilitate job growth for Florida's businesses and citizens leading to a vibrant statewide economy.

EFI accomplishes this mission by focusing on a wide range of industry sectors, including clean energy, life sciences, information technology, aviation/aerospace, homeland security/defense, financial/professional services, manufacturing, corporate headquarters, research & development, emerging technologies and beyond. In collaboration with a statewide network of regional and local economic development organizations, EFI helps to improve Florida's business climate, ensuring the state's global competitiveness. EFI last updated the Florida Target Industry List in 2011.

Enterprise Florida's Target (Value-Added) Industries

Growth Assistance Program (GAP) Amount and Use of Funds. Businesses need to be able to locate in other states and serve multi-state and/or international markets. Call Centers and Shared Service Centers may qualify if certain economic criteria are met.

Broward County

Broward County Office of Economic and Small Business Development (OESBD) and the Greater Fort Lauderdale Alliance, the public/private partnership for Broward County, work together for the purpose of allocating and leveraging collective economic development resources to sustain and enhance the economic growth, vitality, and global competitiveness of Broward County as a superior business location.

The OESBD is primarily responsible for enhancing the economy of Broward County by recruiting new industry, supporting existing industries, and creating new value-added employment opportunities for residents. Its mission is to promote job growth, diversify the County's industrial mix, and expand the local tax base, OESBD works closely with key partners to accomplish its mission.

The OESBD is the primary contact for all economic development interfaces with the State and Enterprise Florida, the State's economic development organization. The County's primary economic incentives are those offered by the State as described in this section.

Broward County approved a Target Industry Study in 2008 which defined Broward County's Target Industries as follows:

- Advanced Materials and High-Tech Manufacturing
- Alternative Energy and Renewable Resources
- Aviation / Aerospace
- Global Business Services
- Global Media and Production
- Headquarters and Management Operations
- Human Resources and Higher Education
- International Trade and Logistics
- Life Sciences
- Marine Industries

Greater Fort Lauderdale Alliance

The Greater Fort Lauderdale Alliance (The Alliance) is Broward County's official public/private partnership for economic development. The Alliance represents the Broward County/Greater Fort Lauderdale - a metro area of 31 municipalities and approximately 1.9 million people - fosters and promotes business attraction, recruitment, retention, expansion and new capital investment. The Alliance works with its partners to market the area nationally and internationally, to conduct regional research and to coordinate efforts to influence business and government issues that impact economic growth and development.

Greater Fort Lauderdale Alliance Target Industries are as follows:

- Advanced Materials & High Tech Manufacturing
- Aerospace and Aviation
- Cloud Technology and Mobile Communications
- Corporate Headquarters
- Life Sciences
- Marine
- International Trade and Logistics

The Beacon Council

Because of the City's location relative to Miami-Dade County as well as its strong employment ties to the City, SPG also analyzed Miami-Dade's target industries. The Beach Council, as Miami-Dade County's official economic development partnership, is charged with bringing new, job-generating investments to the community, while assisting existing businesses in their efforts to expand. By doing this, The Beacon Council facilitates the creation of quality jobs for each and every resident of Miami-Dade County.

The Beacon Council Target Industries are:

- Aviation
- Life Sciences
- Financial Services
- Information Technology and Telecommunications
- International Business
- Professional Services
- Visitor
- Film & Entertainment
- Logistics

Recommended Target Industries for Pembroke Pines

The City needs to take advantage of the branding and name recognition of Broward County/ Greater Fort Lauderdale. In its branding efforts, the City needs to emphasize that the City of Pembroke Pines is the 2nd largest city in population in Broward County/ Greater Fort Lauderdale area.

Economic development strategies need to be holistic and recruit or retain companies that create jobs at all levels including high value added, mid management, and low skill-entry level. A community needs to be mindful that it cannot survive alone on recruiting high paying jobs; in order to be successful and build job opportunities it needs jobs at every skill/occupational level. This is especially true given the job losses that occurred during this current recession.

The City of Pembroke Pines does not have any true industrial clusters other than retail; therefore the City should concentrate on the ten target industries that have been identified by the Broward County Office of Economic and Small Business Development (OESBD) in their 2008 study.

Advanced Materials and High-Tech Manufacturing

- Plastics
- Cement and Concrete
- Chemicals wholesaling
- Rubber

Alternative Energy and Renewable Resources

- Electric Power Generation
- Architectural, Engineering & Related Services
- Environmental Services
- Water Utility Systems

Aviation / Aerospace

- Aerospace Products and Parts
- Avionics
- Air Transportation Support

Global Business Services

- Banking
- Computer Systems Design
- Insurance Carriers
- Commercial Credit

Global Media and Production

- Radio and Television Broadcasting
- Motion Picture & Video Industries
- Advertising, Public Relations & Related Services
- Internet Service Providers & Web Search Portals
- Cable & Other Subscription Programming

Headquarters and Management Operations

- Corporate headquarters
- Business, Professional, Labor & Political Organizations
- HR & Management/Consulting Services
- Commercial Equipment Leasing

Human Resources and Higher Education

- Colleges, Universities & Professional Schools
- Other Schools and Instruction
- Business Schools & Management Training
- Computer Training

International Trade and Logistics

- Professional & Commercial Equipment Wholesalers
- Machinery, Equipment & Supplies Wholesalers
- Freight Transportation Arrangement
- Miscellaneous Durable Goods Wholesalers
- Electrical & Electrical Goods Wholesalers
- Grocery & Related Product Wholesalers
- Metal & Mineral Wholesalers
- Logistics Consulting Services

Life Sciences

- Biotechnology Research
- Pharmaceuticals
- Medical Devices
- Medical Equipment & Supplies

Marine Industries

- Ship & Boat Building
- Electronics Repair and Maintenance

2010 Broward County Industrial Target Study

Due largely to the impacts of the recession, the County commissioned a new study to review and update its target industries. The details of that 2010 study are found in the appendix to this report. That study lists the following industry sectors:

- Advanced Materials & Hi-Tech Manufacturing
- Alternative Energy & Renewable Resources
- Aviation/Aerospace
- Global Business Services
- Global Media & Production
- Headquarters & Management Operations
- Human Resources Development & Higher Education
- International Trade & Logistics
- Life Sciences
- Marine
- Enhanced Tourism
- Health Care

Each of the above clusters were then analyzed to define the top industries at the six (6) digit NAICS level. For example, NAICS 424610 Plastics Materials and Basic Forms and Shapes Merchant Wholesalers ranked first (1st) or the highest target under Advanced Materials & Hi-Technology Manufacturing.

The City's educational reputation, lends itself to pursue Science, Technology, Engineering and Math oriented business (STEM). STEM employment is heavily oriented to the millennial generation which desire a 24 hour live/work/play environment. A Pembroke Pines company, GDKN whose focus is on software consulting and staffing was recently selected by GrowthFL as one of the 50 State winners of the State's 500 second stage companies; they are one of the two companies selected in Broward County.

Within the STEM environment, it is recommended that the City strengthen its medical sector cluster, i.e. Senator Howard C Forman Health Park, expansion of Memorial Hospital, etc. While retail is not usually viewed as economic development at the City level, it nonetheless is important when considering the growing desire for a full 24/7 live and work environment. One missing retail component i.e. restaurant gap, based on SPG interview, there was stated an interest for a high end steakhouse.

Economic Development Incentives

The City of Pembroke Pines currently has available a large number of incentives from the State. City incentives are considered on a case by case basis. For example: The Stem Cell Nutrition Company®, relocated its International Headquarters and Manufacturing/R&D laboratory from San Clemente, California to Pembroke Pines, Florida. The relocation will result in the addition of 90 new jobs at an average salary of approximately \$65,849, along with providing \$1.350 million in capital investment for construction/renovations and office equipment for both the headquarters office facility at 2010 NW 150th Avenue in Pembroke Pines and a separate manufacturing/R&D laboratory space to be located in a separate facility.

The company received incentives from Enterprise Florida, the City of Pembroke Pines and the Greater Fort Lauderdale Alliance CEO Council. It received state and local incentives from Florida and the City of Pembroke Pines for \$615,000 which consists of \$540,000 from the Qualified Target Industries Tax Refund Program along with \$50,000 from the Governor's Quick Action Closing Fund and \$25,000 in a Direct Cash Incentive from the City of Pembroke Pines for the hiring of Pembroke Pines residents.

What Are Development Incentives?

Development incentives refer to inducements local governments use to attract and retain companies and facilities. These incentives take two principal forms: tax incentives and non-tax incentives.

Tax incentives. The traditional workhorse of business climate policy is the tax incentive. Tax incentives include various types of abatements, exemptions, reductions, and moratoria. These may take a variety of forms, such as corporate income tax exemptions, sales/use tax exemptions on new equipment, and tax exemptions or moratoriums on equipment and machinery. Included in this category are also other tax-related investment incentives, such as investment and tax credits, research and development tax incentives, and accelerated depreciation of industrial equipment. A special kind of tax incentive program that has received much attention in recent years is the Enterprise Zone (EZ) concept (also known as Empowerment Zones and Empowerment Communities). EZs have been used by the federal government and even more widely by many states. Despite their popularity, however, research has not, by and large, found them to be very effective tools for economic development.

Non-tax incentives. These are a growing form of inducement, including grants, creative financing subsidies and customized worker training. The mainstay is the Industrial Development Bond, or IDB. These are used by almost every state to offer low-interest loans to firms. A variation on the IDB is the use in many states of Tax Increment Financing (TIF) districts. TIF allows governments to float bonds to help companies based on their anticipated future tax impact. Finally some states also provide "incentives" by reforming how they can calculate the tax base.

Florida Economic Development Incentives Toolbox⁶

The tool box of incentives for the State of Florida has been virtually unchanged for the past 20 years. There have however been updates as new technologies were added to the State's Target Industry List.

The State is committed to providing incentives that are up to date with the changing technology market; as such, in 2011 the State revised its target industry list to be more inclusive of emerging technology sectors, new types of manufacturing, corporate headquarters and research and development.

E-Florida Incentives

Florida offers bottom-line advantages for long term profitability for all types of businesses, from corporate headquarters to manufacturing plants to service firms. Florida offers incentives for:

- Targeted Industries
- Workforce Training
- Infrastructure
- Special Opportunities

Targeted Industry Incentives

Qualified Target Industry Tax Refund (QTI)

The Qualified Target Industry Tax Refund incentive is available for companies that create high wage jobs in targeted high value-added industries. This incentive includes refunds on corporate income, sales, ad valorem, intangible personal property, insurance premium, and certain other taxes. Pre-approved applicants who create jobs in Florida receive tax refunds of \$3,000 per net new Florida full-time equivalent job created; \$6,000 in an Enterprise Zone or Rural Community (county). For businesses paying 150 percent of the average annual wage, add \$1,000 per job; for businesses paying 200 percent of the average annual salary, add \$2,000 per job; businesses falling within a designated high impact sector or increasing exports of its goods through a seaport or airport in the state by at least 10 percent in value or tonnage in each year of receiving a QTI refund, add \$2,000 per job; projects locating in a designated Brownfield area (Brownfield Bonus) can add \$2,500 per job. The local community

where the company locates contributes 20 percent of the total tax refund. There is a cap of \$5 million per single qualified applicant in all years, and no more than 25 percent of the total refund approved may be taken in any single fiscal year. New or expanding businesses in selected targeted industries or corporate headquarters are eligible.

Qualified Defense and Space Contractor Tax Refund (QDSC)

Florida is committed to preserving and growing its high technology employment base by giving Florida defense, homeland security, and space business contractors a competitive edge in consolidating contracts or subcontracts, acquiring new contracts, or converting contracts to commercial production. Pre-approved applicants creating or retaining jobs in Florida may receive tax refunds of \$3,000 per net new Florida full-time equivalent job created or retained; \$6,000 in an Enterprise Zone or rural county. For businesses paying 150 percent of the average annual wage, add \$1,000 per job; for businesses paying 200 percent of the average annual salary, add \$2,000 per job.

Capital Investment Tax Credit (CITC)

The Capital Investment Tax Credit is used to attract and grow capital-intensive industries in Florida. It is an annual credit, provided for up to twenty years, against the corporate income tax. Eligible projects are those in designated high-impact portions of the following sectors: clean energy, biomedical technology, financial services, information technology, silicon technology, transportation equipment manufacturing, or be a corporate headquarters facility. Projects must also create a minimum of 100 jobs and invest at least \$25 million in eligible capital costs. Eligible capital costs include all expenses incurred in the acquisition, construction, installation, and equipping of a project from the beginning of construction to the commencement of operations. The level of investment and the project's Florida corporate income tax liability for the 20 years following commencement of operations determines the amount of the annual credit.

High Impact Performance Incentive Grant (HIPI)

The High Impact Performance Incentive is a negotiated grant used to attract and grow major high impact facilities in Florida. Grants are provided to pre-approved applicants in certain

⁶ e-Florida web site, www.eflorida.com

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

high-impact sectors designated by the Governor's Office of Tourism, Trade and Economic Development (OTTED). In order to participate in the program, the project must: operate within designated high-impact portions of the following sectors-- clean energy, corporate headquarters, financial services, life sciences, semiconductors, and transportation equipment manufacturing; create at least 50 new full-time equivalent jobs (if a R&D facility, create at least 25 new full-time equivalent jobs) in Florida in a three-year period; and make a cumulative investment in the state of at least \$50 million (if a R&D facility, make a cumulative investment of at least \$25 million) in a three-year period. Once recommended by Enterprise Florida, Inc. (EFI) and approved by OTTED, the high impact business is awarded 50 percent of the eligible grant upon commencement of operations and the balance of the awarded grant once full employment and capital investment goals are met.

Workforce Training Incentives

Quick Response Training Program (QRT)

Quick Response Training (QRT) - an employer-driven training program designed to assist new value-added businesses and provide existing Florida businesses the necessary training for expansion. A state educational facility - community college, area technical center, school district or university - is available to assist with application and program development or delivery. The educational facility will also serve as fiscal agent for the project. The company may use in-house training, outside vendor training programs or the local educational entity to provide training. Reimbursable training expenses include: instructors'/trainers' wages, curriculum development, and textbooks/manuals. This program is customized, flexible, and responsive to individual company needs. To learn more about the QRT program, visit Workforce Florida.

Incumbent Worker Training Program (IWT)

Incumbent Worker Training (IWT) - a program that provides training to currently employed workers to keep Florida's workforce competitive in a global economy and to retain existing businesses. The program is available to all Florida businesses that have been in operation for at least one year prior to application and require skills upgrade training for existing employees. Priority is given to businesses in targeted industries, Enterprise Zones, HUB

Zones, Inner City Distressed areas, Rural Counties and areas, and Brownfield areas. For additional information on the IWT program, visit Workforce Florida.

Infrastructure Incentives

Economic Development Transportation Fund

The Economic Development Transportation Fund, commonly referred to as the "Road Fund," is an incentive tool designed to alleviate transportation problems that adversely impact a specific company's location or expansion decision. The award amount is based on the number of new and retained jobs and the eligible transportation project costs, up to \$3 million. The award is made to the local government on behalf of a specific business for public transportation improvements.

Special Opportunity Incentives

Rural Incentives

Florida encourages growth throughout the state by offering increased incentive awards and lower wage qualification thresholds in its rural counties. Additionally, a Rural Community Development Revolving Loan Fund and Rural Infrastructure Fund exist to meet the special needs that businesses encounter in rural counties.

Urban Incentives

Florida offers increased incentive awards and lower wage qualification thresholds for businesses locating in many urban core/inner city areas that are experiencing conditions affecting the economic viability of the community and hampering the self-sufficiency of the residents.

Enterprise Zone Incentives

Florida offers an assortment of tax incentives to businesses that choose to create employment within an enterprise zone, which is a specific geographic area targeted for economic revitalization. These include a sales and use tax credit, tax refund for business machinery and equipment used in an enterprise zone, sales tax refund for building materials used in an Enterprise Zone, and a sales tax exemption for electrical energy used in an enterprise zone.

Brownfield Incentives

Florida offers incentives to businesses that locate in brownfield sites, which are

underutilized industrial or commercial sites due to actual or perceived environmental contamination. The Brownfield Redevelopment Bonus Refund is available to encourage Brownfield redevelopment and job creation. Approved applicants receive tax refunds of up to \$2,500 for each job created.

Jobs for the Unemployed Tax Credit Program (JUTC)

The Jobs for the Unemployed Tax Credit Program provides incentives to businesses throughout Florida to hire qualified employees who were previously unemployed. The program is available to all businesses that are identified as a "target industry". The business may receive a tax credit of \$1,000 for every employee hired as of July 1, 2010. The business may claim only new hires that were previously unemployed for a minimum of 30 days, and that remain employed after a 12-month period at an average of 36 hours per week. This program will run until June 30, 2012 with a limit of \$10 million available for tax credits.

Local Government Distressed Area Matching Grant Program (LDMG)

The Local Government Distressed Area Matching Grant Program stimulates investment in Florida's economy by assisting Local Governments in attracting and retaining targeted businesses. Applications are accepted from local governments/municipalities that plan on offering financial assistance to a specific business in the area. These targeted businesses are required to create at least 15 full-time jobs and the project must either be new to Florida; expanding operations in Florida; or leaving Florida unless it receives local and state government assistance. The amount awarded by the State of Florida will equal \$50,000 or 50% of the local government's assistance amount, whichever is less, and be provided following the commitment and payment of that assistance.

Discussion of Florida Incentives

Most of the State's programs require the company pay an average annual wage that is at least 115 percent of the state, metropolitan statistical area (MSA), or the local average wages. For a project located in a designated brownfield area, an enterprise zone or a manufacturing project paying at least 100 percent of the prevailing average wage, the

wage requirement may be waived in special circumstances.

It appears that most Florida communities use the State of Florida incentives when appropriate, while not all of the State of Florida incentives can be applied in rural and urban counties equally. Many local and county governments in Florida have eliminated transportation impact fees for a two year period to allow time for the local economy to rebound. This currently appears to be the new "norm".

The most recent *Economic Development Incentives Report 2012* prepared by The Florida Legislature Office of Economic and Demographic Research reported that 72 local government entities completed the annual survey questionnaire. Of the 37 municipalities that reported, 9 municipalities did not issue economic development incentives which met the statutory reporting requirement (incentives greater than \$25,000 during the previous fiscal year). Incentives in the amount of \$25.8 million were reported by the municipalities that completed this survey. The largest percentage of the incentives granted was in the form of below market leases and deeds, accounting for \$10.0 million of the total incentives (38.9%).⁷

Projects are typically evaluated based on the type of industry, wages, target industry, clean industry and whether the new project is the first project of a desired type of industry. For instance, if a community is attempting to relocate a financial services company and the community currently does not have this type of industry, then a larger incentive is usually offered to the first company to relocate. It's the concept of a "lost leader," which is what stores will do to get you in the door. The second company will typically receive a smaller incentive award.

Generally, a community makes the decision for awarding incentives based on not wanting to give a company more in incentives then it can reasonably expect to receive back in the form of increased ad valorem taxes, business fees, franchise fees, utility payments, etc. over a reasonable period of time.

Employed Worked Training (EWT)

The EWT program is administered by CareerSource Broward and provides short-term

⁷ *Economic Development Incentives Report 2012* prepared by The Florida Legislature Office of Economic and Demographic Research

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

training to upgrade skills for employed workers in Broward County. The program coordinator meets with the company to assess training needs. In most cases, training can be customized, and employees can receive training on-site or at a local training institute. Examples of training include Leadership, Team Building, Customer Service, Microsoft Office Software, Work Place English or Spanish, Work Place Math or Industrial Math, and ISO. There is a maximum hourly wage limit for employees to qualify for this training grant.

On the Job Training (OJT)

This program provides an incentive for employers to hire qualified individuals who may not have the experience for a position. By hiring an employee in a training capacity, businesses can be reimbursed for a portion of that employee's salary for up to six months.

Florida Power & Light Economic Development Rates

New or expanding businesses that add a minimum of 350 kW of new electric load and create at least 25 new jobs per 350 kW of added load can apply for the new economic development rates.

Broward County Economic Development Incentives

Business Attraction and Recruitment

The Office of Economic and Small Business Development (OESBD) provides technical support in various forms to businesses and non-profit organizations. This technical support can be through internship/co-op programs between local universities and business needs, and assistance with grants and incentive information. New and existing businesses can inquire upon applications for bonds and other financial assistance programs that could help businesses grow resulting in job creation, as well as grant information to aid in the implementation or expansion of a new headquarters, district or business.

Among the tools and resources employed by OESBD to accomplish these objectives are:

- Qualified Target Industry Tax Refund (State of Florida)
- Broward County Job Growth Incentive Program
- High Impact Performance Incentive Grant (State of Florida)
- Capital Investment Tax Credit (State of Florida)

In addition to the State of Florida incentive programs, Broward County also offers the Broward County Job Growth Incentive.

Broward County Job Growth Incentive

Both new and existing businesses creating high skill/high wage jobs and serving multi-state or international markets may be eligible for this incentive. The incentive is a direct cash incentive paid to companies creating jobs in excess of the 115% of the County's average annual wage. This program requires the joint participation of Broward County and the municipality in which the company is, or will be located. Companies could receive up to \$2,000 per new job created to a maximum Broward County contribution of \$200,000 per company.

The Office of Economic and Small Business Development's Retention and Expansion programs are also used to attract and recruit businesses. The (OESBD) is continually engaged in research and analysis projects designed to determine the feasibility of recruiting certain industries into Broward County, and to evaluate the potential long term success of those industries within the community. Past analyses performed by OESBD include: The Broward County Composite Industry Study and The Marine Industry Analysis Report.

Streamlined Development Review/Permitting Process

Broward County and its municipalities are committed to helping businesses succeed and grow. One of the ways in which communities do this is through a streamlined development review process for high-impact, targeted industry businesses that are relocating or expanding in Broward County.

Eighteen of the thirty-one cities in Broward County have been ranked as Platinum Cities by the Greater Fort Lauderdale Alliance because they have taken extra steps to help ensure businesses have a first-rate experience when going through the development review/permitting process. Those municipalities have adopted a streamlined permitting ordinance or resolution, have an online permit tracking system, and have designated a staff representative as a "concierge" to businesses who are going through the permitting process.

Platinum Permitting City

Pembroke Pines has been recognized as a Platinum Permitting City by the Greater Fort Lauderdale Alliance. Pembroke Pines is also developing an E-Permitting process for electronic project tracking.

Benchmarked City Incentives

Four predominately suburban Cities were analyzed with respect to incentives: Ormond Beach, Cape Coral, Port St. Lucie, and Deltona. Incentives offered by these benchmarked cities vary considerably.

City of Ormond Beach

In addition to the State of Florida Incentive toolkit, the City of Ormond Beach, working with Strategic Planning Group, Inc. developed the City's own incentive program referred as the "City of Ormond Beach Growth Assistance Program (GAP)".

Program Eligibility includes:

- GAP funds are applicable to targeted businesses as defined in the State of Florida Qualified Target Industries and as amended.
- Ineligible uses include retail and residential not within the Downtown CRA District.
- New or expanding businesses must make a positive contribution to the economy of the City of Ormond Beach in terms of a minimum of ten (10) net new jobs in year one.
- GAP funding agreement may apply over a three (3) year period.
- Startup businesses with less than 10 new jobs in the first year of operation require certification by Daytona State College Small Business Development Center.
- Incentives are performance based on any of the following criteria:
 - Number of permanent net new jobs created
 - Wage levels of the new jobs
 - Construction employment, construction expenditures
 - New capital equipment installed in the business applicant's Ormond Beach facility

Growth Assistance Program (GAP) Amount and Use of Funds

- The funding is calculated as follows:
 - The funding grant ratio is based on the annual salaries/wages of the average Volusia County salary/wage rates (\$32,274 in 2012 and as amended).

- The GAP funding ratio is as follows:
 - Annual Salary/wages below 100% \$2,000/new job created
 - Annual Salary/wages 100% -149% \$3,000/new job created
 - Annual Salary/wages 150% -199% \$4,000/new job created
 - Annual Salary/wages 200% plus \$5,000/new job created
- No more than \$300,000 is be granted to any one business

City of Cape Coral

The City of Cape Coral and Lee County, like Broward County, were heavily impacted by the recession. Cape Coral has developed a few local incentives in addition to those provided by Lee County and those offered by the State. The City offers a Cash Incentive Program of up to \$2,000 per job created above the average wage, and up to \$1,500 per job that equals the average wage. It also has an Impact Fee Deferral Program that defers payment of road and utility capital improvement impact fees for targeted industries. The Shell Building Impact Fee Deferral is also available where impact fees can be deferred up to 36 months.

Lee County offers financial incentives for recruiting strategic target industries with performance incentives up to \$25 million in reserve. The County has a Job Opportunity Program that provides a cash incentive of up to \$6,000 for each full-time job created. Details of the City/County incentive programs can be found on the Cape Coral's webpage.

City of Deltona

The City of Deltona, according to its webpage, does not offer any unique incentives other than those provided by the State.

City of Port St. Lucie

Lastly, the City of Port St. Lucie offers a Job Growth Investment Grant in the range of \$1,500 - \$3,000 per job paying over 107% of the current hourly wage. They also provide an Ad Valorem Tax Abatement Incentive, expedited site plan review and fast track permitting.

Other Incentive Programs Used in Florida

City of Sanford

Subsidization of UCF Sanford Business Incubator⁸

The UCF Sanford Incubator was opened on September 18, 2009, in a 3,791 sq. ft. space. The facility is the sixth of the award winning UCF Incubators, designed for mentoring and start-up assistance of emerging technology companies. In the agreement negotiated with UCF, the Sanford CRA agreed to subsidize the rent and other operational costs of the Incubator in recognition of the positive benefit the facility would have to the community development of downtown Sanford. Within three months of its opening the facility was at full capacity. In March 2010, the facility was expanded to 6,000 sq. ft. and a full time administrator was hired. After six months the facility was again near full capacity with 12 tenants, representing mainly technology firms. The Sanford Incubator is recognized as one of the fastest growing and highest quality facilities of the UCF Incubator system.

City of Gainesville

Grow Gainesville Fund⁹

Flexible SBA 7(a) Loan; Can be used for working capital, inventory, equipment, refinancing debt and acquiring existing buildings. Program has only been in place for one year. All the underwriting for the loans is done by the National Development Council. Two projects qualified to date, both are restaurants. The loan amounts were \$300,000+ for renovation and working capital and \$400,000+ for renovations and expansion. Restaurants must be in existence for 3 years to qualify. Following is an overview of the Grow America Fund:

What is Grow America Fund?

- It's a long-term, revolving loan fund designed to help businesses expand
- Licensed by the SBA to provide loans to operating businesses
- The goal of the program is to help businesses create and retain jobs
- GAF is designed to leverage equity approximately 4 to 1
- Lending since 1993
- For profit corporation, governed by Board of Directors

- Loans approved by GAF Loan Committee
- Oversight by the Small Business Administration
- Affiliate of NDC
- Average loan size - \$300,000

What are the advantages of this program for the businesses?

- Long term financing
- Low equity requirement
- Flexible underwriting criteria
- Limited pre-payment penalties
- Loans tailored to individual borrowers

What can GAF dollars be used for?

- Real estate acquisitions
- Construction
- Debt refinancing
- Leasehold improvements
- Machinery and equipment and working capital

Company Relocation Incentive Program¹⁰

Gainesville also has a Company Relocation Incentive Program Policy, which was approved on March 15, 2012. The program will offer eligible companies a 50% match on eligible business relocation costs, up to a maximum award of \$50,000. The program will reduce costs associated with physically relocating an eligible company into a Redevelopment Area. The objective of the Relocation Incentive is to alleviate blight and economic distress. The relocation of companies and their employees into the Redevelopment Areas will help to lower vacancy rates, increase employment levels, raise the tax base, diversify economic opportunities and promote redevelopment goals. The encouragement of private enterprise will help the Redevelopment Areas become self-sustaining in the long term and will serve to implement the Redevelopment Plan.

⁸ Sanford, Florida CRA Annual Report 2009-2010

⁹ Gainesville, CRA, Grow Gainesville Fund

¹⁰ Gainesville, CRA, Company Relocation Incentive Program Policy, March 15, 2012

Development Incentive Guidelines

Discussions were conducted with economic development professionals from around the State and with Jerry Walker at Impact DataSource. Impact DataSource is a Texas based economic consulting, research and analysis firm. The firm specializes in economic and fiscal impact analysis and other economic studies. SPG worked with Impact DataSource to develop Guidelines for Making Good Decisions on Incentives.

SPG recommends that the City develop formal incentive guidelines. The guidelines need to be broad rather than restrictive and projects should always be evaluated individually. There is no magic solution that will work the same for every project.

Now would be the ideal time for the City to explore other options in addition to developing criteria for evaluating economic development projects. In order to stay current with new technologies being used by businesses today and to improve its competitiveness, the City should explore the broad band capacity. This is one area where the City can jump out ahead of its competition. The SPG would be available to coordinate this research with subject experts should the City desire to do this in the future.

Some rules of thumb on incentives should include the following:

Rules of Thumb on Incentives¹¹

- Provide incentives to projects where the additional public revenues generated by the project exceed public costs
- The larger the rate of return on investment, the better the deal is for the community
- The shorter the payback period, the better the deal is for the community
- A general guideline is that communities only consider investments that result in a rate of return greater than 10% and a payback period less than 10 years
- Each community should establish its minimum investment objectives

- If the firm is leasing a building, consider the lease term as the maximum payback period – the city should get its money back before the lease expires
- Go outside the box on a community-changing deal
- Incentives should be provided to projects that improve the quality of life for residents
- Concentrate incentives on target industries
- Give priority to incentives for basic industries – those that:
 - Export products (Primary Industry) and bring in new dollars
 - Create more spin-off economic impacts in the community
- Do not offer incentives to firms that will be harmful or destroy existing businesses
- Make incentives available equally to existing local businesses and to businesses recruited from outside the community
- It is more efficient and less costly to retain existing local businesses and assist local businesses to expand than to recruit a business from outside the community

At a minimum, a community should do the following:

- Conduct an economic and fiscal impact analysis of your economic development projects to:
 - Validate the economic value to the community
 - Determine appropriate incentives
- Establish a Rate of return and payback period should be the primary factors in awarding incentives
- Keep in mind that throwing good money at a project won't make a bad deal good; however, it will make a good deal better.

¹¹ Jerry Walker, Principal, Impact DataSource

Economic Development Incentives

Guidelines for Making Good Decisions on Incentives

Goal of Economic Development

- Economic development activities should:
 - Create revenues for businesses in the community
 - Create jobs and salaries
 - Attract investment to expand a community's tax base
- Goal of economic development is to have thriving communities with good quality of life for its residents

Economic Development and Incentives

- Location decisions involve many factors:
 - Availability of sites
 - Access to markets
 - Adequate labor force
 - Adequate infrastructure
 - Good quality of life
 - Reasonable cost of doing business
 - Incentives
- Incentives for a firm reduce its cost of locating or expanding in your community and their cost of doing business
- Incentives can make a firm feel wanted
- Incentives are only appropriate when the firm will generate positive net benefits for a community and it's a good deal for a community
- Many incentives available for prospects are state programs
- Some of the State of Florida incentives require local participation and future ones may also
 - Qualified Target Industry Tax Refund Program (QTI)
 - Economic Development Transportation Fund

General Incentive Guidelines

All counties, cities and EDC's should have written incentive guidelines

- Why written incentive guidelines?
 - Get all local officials on the same page and keep them there
 - Consistency in granting incentives
 - To respond quickly to prospects requesting assistance

Guidelines for Revenue Reducing Incentives

- Try to make city, county and other local taxing districts' exemption and rebate guidelines consistent
- The length and percent of tax exemption and rebate should be based on the level of a firm's investment and specific industries
- Greater investments by a firm justify longer periods and larger percentages of exemptions or rebates
- Grant larger percentage of exemptions or rebates in first years
- Don't give the company a total free ride

Guidelines for Cash Incentives

- Establish a written procedure for granting cash or like cash incentives, including who gets priority, when and how determined
- Common ways the amount of cash incentives are determined:
 - Give the firm what they ask for or just guess at what they might want
 - Go with large, round numbers to impress the prospect, such as \$2 million
 - Offer a certain amount per new job, such as, \$4,000 per job
- The best way to determine appropriate levels of incentives is by using an objective, consistent, analytical approach with an economic impact analysis.

Revenue Reducing Incentives

Two philosophies on revenue reducing incentives, such as tax exemption:

1. Taxes exempted represent a cost to local governments. "It's corporate welfare."
 - Taxes exempted should be compared to what a local government is getting after the exemption
 - Taxes received should be more than those exempted
2. Taxes exempted are not a cost
 - The firm generates its own incentives.
 - Firms generate taxes for the benefit of local governments, where little or no taxes were being generated before.

Cash or Near-Cash Incentives

- How should cash incentives be viewed?
- Incentives are an investment that a city is making in a firm or project
- The tax revenues, that a firm receiving incentives generates, are the city's returns on that investment
- By comparing the investment (the amount of incentives offered) and returns on investment (tax revenues that the city will give over ten years, for example) you can determine:
 - The rate of return on this investment
 - The payback period
- This is how businesses, as well as most individuals, evaluate investment decisions
- Use economic impact analysis to make these financial calculations and to make good decisions on incentives

What is an Economic Impact Analysis?

- The analysis is a calculation of the worth of a project, firm or activity to a state or community
- It should be used to determine appropriate levels of incentives
- An economic impact analysis includes two major components:
 - Economic impact component
 - Fiscal impact component
- Economic impacts include:
 - Direct Impacts and
 - Indirect and induced or spin-off impacts

Direct & Spin-off Economic Impacts

- **Direct Impacts** – economic activities generated by a new firm and its workers
- **Indirect Impacts** – economic activities that occur in other businesses in a community that supply goods and services to the direct firm
- **Induced Impacts** – economic activities generated by direct and indirect workers spending money in the community at grocery stores, gas stations, restaurants, etc.

Determining Indirect & Induced Impacts

- Indirect and induced economic impacts may be calculated using regional industry multipliers and applying these multipliers to revenues, jobs and salaries of the direct firm
- Industry and region specific RIMS II multipliers from US Bureau of Economic may be used
- IMPLAN multipliers may be used

Examples of Direct Economic Impacts

- Revenues of the new firm
- Investments by a firm
- New jobs at a firm
- Salaries paid to these new workers
- Residential property added to local tax rolls by some new workers moving to the community
- The firm's taxable sales
- Lodging sales to out-of-town visitors to the firm

Illustration of Indirect and Induced Economic Impacts

- For every dollar earned by new company in a community, there may be 50¢ in revenues generated in other businesses in the community
- For every 1 job created at a new business, there may be a half of a spin-off job created in other local businesses
- For every dollar paid to a worker at a new business, there may be 50¢ paid to workers in other businesses in the community

Sources of Economic Impacts

- From activities while a firm's facility is being constructed
- From the firm's operations
- From spending by direct and spin-off workers
- From spending by out-of-town visitors to a firm

Fiscal Impacts

- Economic impacts translate into fiscal impacts
- Fiscal impacts are:
 - Additional revenues for local governments
 - Additional costs for local governments
 - Net benefits for local governments

Illustration of Public Revenues

- Sales taxes are collected on the following:
 - Purchases of construction materials/equipment and spending by workers
 - Taxable sales at the firm
 - Taxable spending by the firm
 - Taxable spending by workers
 - Taxable spending by out-of-town visitors

Net Benefits

- Net benefits for local governments from a new firm and its workers are:
 - Additional revenues for local governments
 - Less additional public costs

Conducting an Economic Impact Analysis

- Collect data from a prospect firm using a data sheet
- Collect community data, tax rates and multipliers
- Typical economic impact analysis is a ten year study, but can be longer
- Study includes calculating:
 - Additional revenues for each local taxing district
 - Additional costs for each local taxing district
 - Net benefits for each local taxing district
 - Taxes to be exempted or rebated
 - Rate of return on investment and payback period for cash and other incentives

Incentives That Could Be Offered

- An economic impact analysis may show net benefits for a typical county over ten years to be \$874,915
- Incentive objectives:
 - Payback period of 10 years
 - 10% rate of return
 - Therefore, maximum possible incentives would be \$874,915
- What if we had used an old school approach of \$4,000 per job or \$1.2 million to determine incentives rather than using an objective economic impact analysis approach?

- Incentives of \$1.2 million would have:
 - 7% average annual rate of return on investment over ten years
 - Payback period of 13.2 years

Rules of Thumb on Incentives¹²

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¹² Jerry Walker, Principal, Impact DataSource

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

At a minimum, a community should do the following:

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3

SWOT ANALYSIS
STRATEGIC FRAMEWORK
STRATEGIC ACTION PLAN
EDSP IMPLEMENTATION
MATRIX

Strengths, Weaknesses, Opportunities and Threats (SWOT)

As part of its Community Assessment, SPG staff surveyed and interviewed 20 key stakeholders identified by City staff. This series of public input activities served several purposes. The purpose of the interviews was to gain a sense of community self-perception and marketing strengths, along with the critical community “buy-in” to the project and its resulting economic development initiatives. Second, it provided qualitative and quantitative information to be used to sculpt the Community Assessment, Strengths-Weaknesses-Opportunities-Threats (SWOT), and ultimately the Final Action Plan.

Unlike traditional SWOT assessments that focus on issues so general they could apply to

almost any community, SPG paid special attention to those critical issues that will clearly differentiate the City from other communities. SPG’s SWOT process is unique because it ensures that the city considers not only internal issues, but also issues that impact national and international competitiveness.

Leaders from the City Commission, City Administration, Economic Development Board Members, Planning and Zoning Members, regional partners and City staff were given surveys and were interviewed. The following is a summary of the responses to SPG’s questions about what drives the City’s economy, why the economy needs to diversify and why economic development is important.

1. WHAT TYPES OF BUSINESSES DRIVE THE LOCAL (CITY AND ITS IMMEDIATE SUPPORTING/SURROUNDING REGION) ECONOMY?

By far, the most respondents stated that retail is the primary driver of the City’s economy followed by hospital/medical facilities, restaurants, service businesses and education.

1. WHAT TYPES OF BUSINESSES DRIVE THE LOCAL (CITY AND ITS IMMEDIATE SUPPORTING/SURROUNDING REGION) ECONOMY?

- Retail (27)
- Hospital/Medical Facilities (12)
- Restaurants (10)
- Service Businesses (8)
- Education (6)



2. DO YOU BELIEVE THE LOCAL ECONOMY NEEDS TO DIVERSIFY? WHAT TYPES OF BUSINESSES/JOBS WOULD YOU LIKE TO SEE ADDED TO THE LOCAL ECONOMY?

In terms of economic diversification, respondents felt that the number one target should be corporate and regional headquarters (Class A space), followed by technology, light industrial, and manufacturing/distribution.

2. DO YOU BELIEVE THE LOCAL ECONOMY NEEDS TO DIVERSIFY? WHAT TYPES OF BUSINESSES/JOBS WOULD YOU LIKE TO SEE ADDED TO THE LOCAL ECONOMY?

- Corporate and Regional Headquarters and Class “A” Office (12)
- Technology (Research & Development, Software Engineering, Pharmaceutical) (8)
- Light Industrial (6)
- Manufacturing and Distribution (5)



3. LIST THE REASONS THAT YOU FEEL ECONOMIC DEVELOPMENT IS IMPORTANT TO THE CITY.

By far the primary reason given for economic development was its role in increasing tax revenue and expanding the City’s tax base. Economic development was also cited as increasing local jobs and increasing the City’s quality of life as well as providing revenues to maintain all City services.

3. LIST THE REASONS THAT YOU FEEL ECONOMIC DEVELOPMENT IS IMPORTANT TO THE CITY.

- Increase tax revenue and the tax base (20)
- Jobs (9)
- Quality of Life and maintaining quality City Services of all types (5)



SWOT Analysis

This section of the report describes the City’s main Strengths, Weaknesses, Opportunities and Threats obtained from the interviews and survey.

Strengths

The two biggest strengths of the City’s economy that were identified by respondents are: Quality of Life and Location. Quality of Life referred to a range of topics including housing, safety, municipal services and parks and recreation.

SWOT Analysis:
Interview Summary

S Strengths

- **Quality of Life: Housing, Safety, Municipal Services, Low Crime, Parks & Recreation (22)**
- **Location/Road Access (I-75, Turnpike, 595, US 27 and Good Central Location (17)**
- **Education (K-16) charter and public (10)**
- **Diverse demographics-good median income, ethnicity, race, young and old population (10)**
- **Pro-Business Government, Good City Staff and ED Department, relationship building in the region (5)**

Weaknesses

By far the biggest City weakness as related to economic development was City traffic, followed by the aging eastern portion of the City, the need for an economic development plan, and economic development incentives. Other weaknesses were related to planning and zoning issues, lack of land for office or industrial parks as well as having no eminent domain powers.

SWOT Analysis:
Interview Summary

W Weaknesses

- **Traffic and need for mass transit (16)**
- **Aging east side housing and retail (8)**
- **Need an ED Plan and ED incentives (6)**
- **Planning and Zoning Issues (6)**
- **Lack of non-residential land for development, Lack of Industrial Land & Business Parks (6)**
- **Not having Eminent Domain (3)**

Opportunities

Perceived economic development opportunities were tied to transportation improvements, development of an international trade program, a business recruitment plan, and increasing economic development incentives and funding for economic development. The last two opportunities focused on the final development of City Center and the ability of the City to use eminent domain as a redevelopment/economic development tool.

SWOT Analysis:
Interview Summary

O Opportunities

- **Traffic, Mass Transit, Public Transportation, Pembroke Road/I-75 Interchange, Widening of roads, Flyover on Pembroke Road (9)**
- **Develop an International Trade Program (5)**
- **Need Business Recruitment Plan, Incentives Plan, Funding for ED efforts, & more ED staff (5)**
- **Completion of City Center (4)**
- **Ability to exercise Eminent Domain (3)**

Threats

The main threats to the City’s economic growth were specifically related to the City’s transportation issues, and potential for declining municipal services. Also noted as a threat was not implementing the results of this economic planning effort and finding a more permanent funding source for economic development and business development. Finally, there was concern about another recession and its impact on housing values as well as the impact of aging housing on tax revenues.

SWOT Analysis:
Interview Summary

T Threats

- **Not dealing with traffic and traffic related issues, crowded roads (10)**
- **Declining Municipal Services-Police, Fire, Water, Sewer, etc. (10)**
- **Lack of will and no viable ED Plan, no plan for financing ED, need more funding for business development (5)**
- **Decreasing housing values and aging housing (3)**

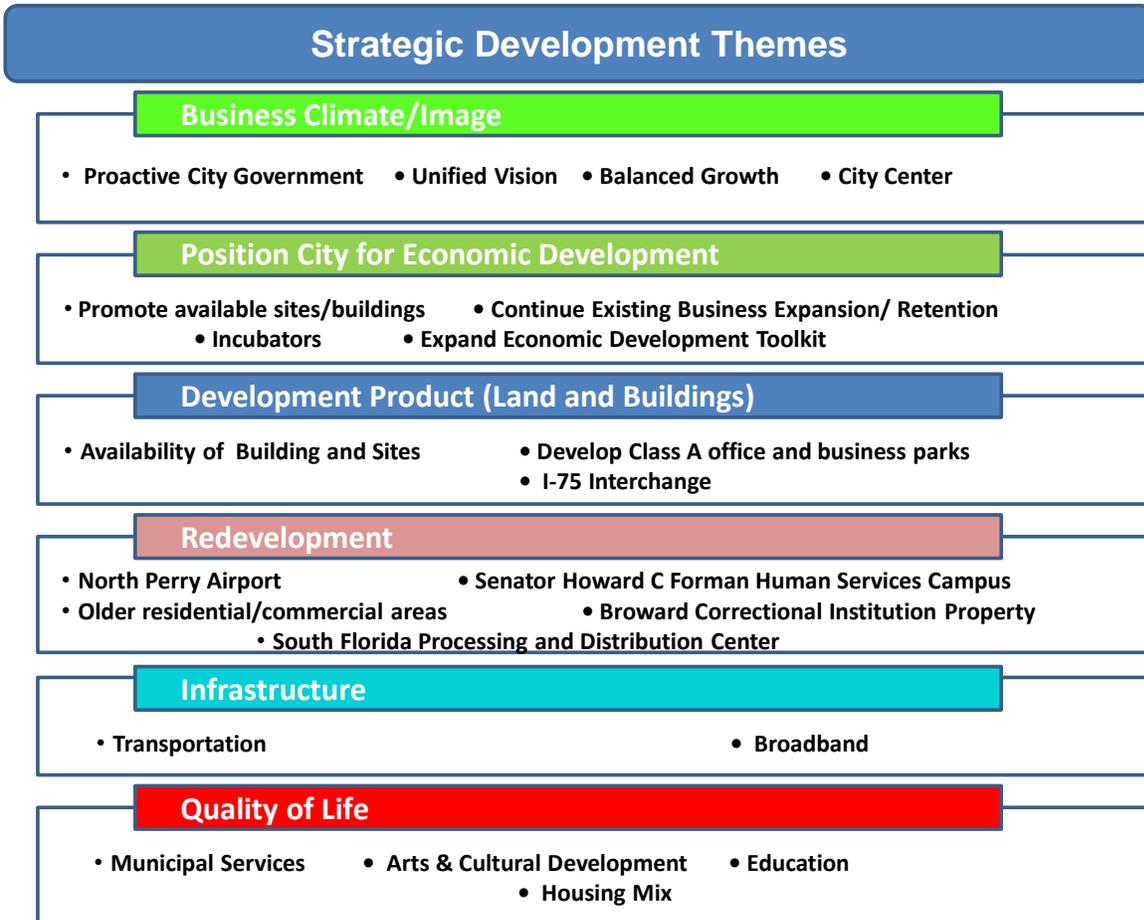
SWOT Summary

The following is a summary of the findings of the SWOT Analysis:

STRENGTHS	WEAKNESSES
<p>Quality of Life: Housing, Safety, Municipal Services, Low Crime, Parks & Recreation (22) Location/Road Access (I-75, Turnpike, 595, US 27 and Good Central Location (17) Education (K-16) charter and public (10) Diverse demographics-good median income, ethnicity, race, young and old population (10) Pro-Business Government, Good City Staff and ED Department, relationship building in the region (5)</p>	<p>Traffic and need for mass transit (16) Aging east side housing and retail (8) Need an ED Plan and ED incentives (6) Planning and Zoning Issues (6) Lack of non-residential land for development, Lack of Industrial Land & Business Parks (6) Not having Eminent Domain (3)</p>
<p>Traffic, Mass Transit, Public Transportation, Pembroke Road/I-75 Interchange, Widening of roads, Flyover on Pembroke Road (9) Develop an International Trade Program (5) Need Business Recruitment Plan, Incentives Plan, Funding for ED efforts, & more ED staff (5) Completion of City Center (4) Ability to exercise Eminent Domain (3)</p>	<p>Not dealing with traffic and traffic related issues, crowded roads (10) Declining Municipal Services-Police, Fire, Water, Sewer, etc. (10) Lack of will and no viable ED Plan, no plan for financing ED, need more funding for business development (5) Decreasing housing values and aging housing (3)</p>
OPPORTUNITIES	THREATS

Strategic Economic Development Themes

This report presented the findings of the SWOT as individually deemed important issues. The next step in preparing an Economic Development Plan was to establish a common framework for the Plan. In analyzing all the data collected, six (6) common themes emerge as a common framework.



Strategic Plan Framework

The recommended economic development strategic plan for the City of Pembroke Pines is composed of the following elements:

- Goals, objectives and strategies;
- Organizational responsibilities for each strategy; and
- Order and magnitude of financial requirements

Goals, Objectives and Strategies

In the recommended strategic plan, statements are set forth to identify the desired ends of the plan (goals), provide specific and measurable milestones toward which the goals are directed (objectives), and stipulate how activities and programs shall be conducted to achieve the goals and objectives (strategies). Related objectives are listed under each of the goal statements. Explicit strategies are provided for each of the objectives.

Goals and objectives need to be clearly defined and based on realistic expectations in order to formulate specific programs for action. The goals constitute an overall working framework for identifying and assessing alternative strategies, which are assigned priority. The economic development strategies represent action-oriented approaches to the achievement of the stated goals and objectives.

A strategy or strategic action consists of a project or course of action to be undertaken to accomplish a defined objective. Generally, it is possible to express a strategic action in a single sentence or phrase reflecting an approach that could encompass any number of specific activities or tasks. For example, one strategy for attracting high technology firms could be the establishment of a direct mail program based on the purchase of address lists for firms that might be identified in a target industry study. This strategic action would involve such tasks as procuring a mailing list, formulating a series of letters, packaging and mailing the marketing materials, and conducting follow-up contacts.

The strategic plan is the means by which the goals recommended herein or developed as the process continues can be accomplished, despite the likelihood of change over a period of time. The strategies should be clearly stated, but the individual tasks within each strategy need not be outlined. Some accommodation for flexibility in implementation is desirable. If goals,

objectives, and strategies are structured properly, the plan will be flexible enough to respond to unexpected changes with a minimum degree of disruption or disturbance to area economic development efforts as a whole. The EDSP is a living document and as such should be reviewed at least annually in order to determine the status of the objectives and strategies and updated as appropriate.

Organizational Responsibilities

Once the EDSP has been approved, an implementation matrix defining organizational responsibilities for each of the strategies in the recommended strategic plan should to be specified, with the desired results and a suggested schedule for when the actions are to be undertaken and completed. An implementation matrix is provided in the recommended strategic plan indicating the proposed lead and support roles for the strategies. It will be up to the individual agencies and organizations to reach agreements on assuming the proposed responsibilities.

Organizations currently assuming responsibility for economic development activities in Pembroke Pines must promote a commitment to the strategic economic development process. The organizations must accept responsibility for the actions and be committed to achieving the desired results. Potential conflicts must be resolved and a consensus among the organizations involved in economic development must be achieved for successful plan implementation.

It is necessary to translate responsibilities for the strategic actions which have been accepted by participants into a work plan. While the recommended strategic plan focuses on overall goals and strategies for developing the economy of Pembroke Pines, the City's plans must focus on the specific tasks to be accomplished. An annual work program is the means by which the strategic plan implementation results are achieved and evaluated.

The work programs for the participants in this process should define the actions to be taken to achieve the responsibilities agreed to, but until these specific actions are undertaken, little or nothing will be accomplished. It is therefore essential that agreements to assume responsibilities for the various strategies presented in the plan be made explicit. This

helps to avoid misunderstandings and provides an incentive for performance.

It is recommended that each organization with economic development responsibilities define their involvement in the form of a detailed work plan on an annual basis, and stipulate tasks to be accomplished consistent with the strategic plan. These should include the specific tasks, time frames, staff requirements, resource requirements, estimated budget, and sources of funding.

Implementing the Strategic Plan

While several characteristics distinguish strategic planning from other types of planning and goal-setting efforts, it is the implementation that really sets it apart. The key to strategic planning is that it is action-oriented; its focus is on the allocation of scarce resources to critical issues. The implementation phase is crucial. The success of the strategic planning process comes as much from the process itself as from the strategies defined in the plan. The key to implementation is organization.

The various individuals, agencies, and organizations that have helped identify concerns to be addressed for the recommended strategic plan should now continue to be involved in “getting the job done”. Responsibilities for the specific projects and actions defined in the plan must be clearly understood and accepted.

Each participant should:

- Commit to agreed responsibilities for action;
- Understand the desired results;
- Accept responsibility for the actions and their results;
- Establish an acceptable time frame within which the actions are to be taken and completed; and
- Be committed to achieving the desired results.

The importance of creating an effective organizational structure within the community to implement the strategic plan cannot be overemphasized. Turf protection, organizational jealousies, and duplication of effort must be avoided. The process of consensus-building and negotiation which brings about agreement on the strategic plan components should resolve such problems. If not, they must be resolved as organizational responsibilities are assigned and agreed to.

As discussed previously, there must be a link between strategy and budget. Although some strategies will be oriented to policy changes and removal of administrative barriers and not involve monetary resources, successful strategic planning will require allocation of scarce financial resources to implement project-oriented strategies.

Conclusion

A list of characteristics found in effective strategic plans is presented below as an appropriate summary for the strategic planning model. Ensuring that programs and projects are credible and relate to the community's economic development goals and objectives is a basic requirement of an effective plan. A clear connection between the plan and the proposed projects or programs is essential for favorable public response and continued financial support by all stakeholders.

The characteristics are:

1. The strategic plan has an analytical basis based on accurate and current information.
2. Available previous studies have been consulted and reflected in the strategic plan.
3. The strategic plan reflects a stakeholder interview and SWOT survey process.
4. Projects and activities in the strategic plan are compatible with the findings.
5. The strategic plan specifies concrete actions that will be undertaken in a defined period of time (approximately one to five years, as warranted).
6. There is appropriate linkage between capital projects and program activities necessary to make the capital projects effective.
7. Roles and responsibilities are clearly defined and assigned within the strategic plan for each proposed action.
8. Organizations or persons assigned roles and responsibilities formally make a commitment to attempt to achieve the related proposed actions.
9. The strategic plan reflects or creates an institutional framework necessary to achieve its objectives or to complete its proposed projects and activities.
10. Proposed actions are realistically achievable within a reasonable time frame.
11. The strategic plan has a formal commitment to an ongoing evaluation and monitoring process, including a formal progress review.

Strategic Action Plan

Many elements of the strategic plan recommended in this chapter address issues raised in the preceding chapters. The framework is designed for actual decision making guidance by providing the recommended goals, objectives and strategies. These are the items to be acted upon which will direct the participants in the economic development process.

The programs and actions proposed in this recommended strategic plan are intended to provide the foundation for maintaining a collaborative working relationship among the public and private sector entities involved in promoting economic development in the City of Pembroke Pines, to set forth achievable implementation strategies to guide decision making based on the concerns expressed during the interview and survey processes conducted for this study, and to provide a successful model for city-wide application.

The city's economic development efforts must focus attention on programs to support both new business recruitment and retention of existing businesses and existing job skills. Further economic diversification is also needed, through continued development of the Broward County Target Industries.

Initiatives have been identified throughout the *EDSP* to address most of the City's major liabilities or its opportunities for future growth. However, funding these proposals will not be easy. Although the City has committed significant resources, other public and private resources (county, state, regional and national) will be required to fully implement the *EDSP*.

On these key points this *EDSP* has achieved a resounding consensus. The time now has come to move forward with implementation. The greatest strategic challenge facing Pembroke Pines is no longer a matter of establishing the correct goals and objectives. Rather, the attention of civic and private sector leaders must now focus on ensuring that the community has viable mechanisms to harness the public and private resources at hand, to develop additional resources, and to deploy them in a way that will make a tangible difference in the future performance of the Pembroke Pines community economy.

Action Plan for Change

Economic development is no longer seen as merely a real estate marketing effort to entice businesses (usually headquarter offices or manufacturing plants) to relocate into the area. Today, economic development is truly about enhancing quality of life. It's about increasing per capita wages, training its workforce, enhancing infrastructure that in turn will protect and enhance the area's natural resources. Economic development encompasses not only image and positioning but also business expansion and retention; while addressing product development, economic redevelopment, infrastructure and community development.

As a result of significant public input, six major themes serve as the "Goals" for the *EDSP*.

Goal 1: POSITION CITY IMAGE, CLIMATE AND BRAND FOR ECONOMIC DEVELOPMENT

Goal 2: POSITION THE CITY FOR ECONOMIC DEVELOPMENT

Goal 3: DEVELOP PRODUCT - LAND AND BUILDINGS

Goal 4: PROMOTE ECONOMIC REDEVELOPMENT THROUGHOUT THE CITY

Goal 5: DEVELOP INFRASTRUCTURE FOR BALANCED GROWTH

Goal 6: IMPROVE QUALITY OF LIFE-COMMUNITY DEVELOPMENT

Each of the goals listed have numerous objectives and strategies, which provide the means of attaining their individual and collective results.

This *EDSP* is very comprehensive. **The *EDSP* contains 6 Goals, 20 objectives and 76 strategies.** It should be noted that there is considerable overlap between goals, objectives and strategies and that responsibility for the objectives/strategies involves a host of public and private stakeholders. Without cooperation among all parties, the *EDSP* as outlined below will fail.

Overview of Goals

Goal 1: POSITION CITY IMAGE, CLIMATE AND BRAND FOR ECONOMIC DEVELOPMENT

Improve the city's image through new economic development initiatives, while building on existing strengths of a proactive City government with a unified vision for balanced growth.

Goal 1 represents a shift in how the City perceives itself going forward. This goal has two (2) objectives and eleven (11) strategies. The thrust of this goal is to reposition the City's thinking from being a bedroom community comprised of residential and shopping to a community committed to economic development and expanding the City's tax base.

Objective 1.1: Promote the business identity of the City. Pembroke Pines will promote the City as a place for business by creating a new brand that emphasizes its strategic regional business location; promote its quality of life; promote the new City Center and Civic Center projects.

Strategy 1.1.1: Promote the City as a place for business

Strategy 1.1.2: Create a new Brand (City is more than residential, retail and education)

Strategy 1.1.3: Emphasis strategic regional location

Strategy 1.1.4: Promote Quality of Life (Education, Housing, Municipal Services, City Charter Schools)

Strategy 1.1.5: Promote City Center as the new Downtown

Strategy 1.1.6: Promote Civic Center as a regional business venue and cultural asset

Objective 1.2: Maintain a Proactive City Government. Pembroke Pines will actively promote responsible growth; approve and fund the 5-year Economic Development Plan and subsequent updates.

Strategy 1.2.1: Continue to actively promote responsible growth

Strategy 1.2.2: Approve and fund a 5 year Economic Development Plan and staffing (to include professional development funds)

Strategy 1.2.3: Adopt Vision of Balanced Growth

Strategy 1.2.4: Continue to support and fund infrastructure needs for economic growth

Strategy 1.2.5: Inform development community of regulatory changes, i.e. LDRs, Building Code etc.

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Goal 2: POSITION THE CITY FOR ECONOMIC DEVELOPMENT

Develop an economic development program to include promotion of available sites and buildings; creation of innovative partnerships to support existing businesses; creation of a regulatory environment that embraces collaboration; and, address current economic development toolkit and staffing.

Prepare economic development guidelines as it relates to available sites and buildings, incentives, permitting, establishing target industries, and providing adequate staffing to effectively represent the City. This goal has five (5) objectives and nineteen (19) strategies to define the City's commitment to a new approach for developing its tax base.

Objective 2.1: Promote available sites and buildings. The City has a limited number of vacant sites and available buildings. Without having available sites and building it will continue to be a challenge to recruit new industries.

Strategy 2.1.1: Identify key sites and buildings for economic development opportunities (build a detailed site and building compendium)

Strategy 2.1.2: Develop plan to market land/building assets

Strategy 2.1.3: Collaborate with commercial real estate brokers and the Greater Fort Lauderdale Alliance for updates of the data on the web directory of sites and buildings

Objective 2.2: Create Innovative partnerships to support existing businesses and expansions. The City cannot work in isolation but needs to continue to establish a strong working relationship with other Economic Development and Business stakeholders.

Strategy 2.2.1: Work with businesses to create, attract and retain target industries

Strategy 2.2.2: Develop a comprehensive existing industry program to include survey of existing businesses. An example is the Pasco Economic Development Council Existing Industry Program.

Strategy 2.2.3: Explore options for collaborating with the private sector

Strategy 2.2.4: Increase the awareness of local, State and Regional resources to assist with retention, attraction and growth of value-added businesses

Strategy 2.2.5: Schedule regular meetings with commercial real estate brokers and conduct FAM tours

Strategy 2.2.6: Support Broward College Aviation Program for work force development

Existing Industry Program-Best Case Example

Pasco Economic Development Council (PEDC) in Pasco County, Florida is known for having a strong existing business program. The PEDC annually conducts visitations with existing industries; conducts an annual existing industry survey; provides disaster planning; and provides counseling to businesses through Service Corps of Retired Executives (SCORE), Small Business Development Center (SBDC), Small Business Administration (SBA), Technological Research and Development Authority (TRDA), and Florida Manufacturing Extension Partnership (FMEP). The PEDC also holds an annual banquet and industry awards event to recognize businesses that keep the Pasco County economy growing and strong. The event includes an awards ceremony, industry trade show, and brief report on the county's economic development progress.

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Objective 2.3: Create a regulatory environment that embraces collaboration and cooperation. The City needs to be flexible and customer service oriented in its regulatory environment.

Strategy 2.3.1: Identify and revise regulations that inhibit business growth

Strategy 2.3.2: Explore business friendly policies that encourage business attraction and retention

Strategy 2.3.3: Continue to work with other City departments to further streamline the development process

Objective 2.4: Evaluate current City Economic Development Toolkit. The City needs to development and promote its Economic Development resources.

Strategy 2.4.1: Develop and adopt guidelines for awarding incentives

Strategy 2.4.2: Develop new incentives for existing and new businesses

Strategy 2.4.3: Explore using eminent domain for economic development

Strategy 2.4.4: Explore creation of a business incubator with an institution of higher education

Strategy 2.4.5: Conduct economic and fiscal impact analysis on land use and zoning changes

Objective 2.5 Evaluate Economic Development staffing and funding. It is important that City staff not only professional economic development skills but that these skills be continually updated.

Strategy 2.5.1: Evaluate staffing plans based on the approved EDSP

Strategy 2.5.2: Promote professional development to include conferences, training and professional memberships (State and National)

Goal 3: DEVELOP PRODUCT - LAND AND BUILDINGS

Collaborate with public and private sectors to increase the availability of developed sites for value added businesses.

One of the City's greatest weaknesses is the lack of existing/appropriate inventory to house future recruitment of targeted industries. This includes lack of Class "A" Office space, lack of distribution/warehouse/manufacturing/research & development space and lack of shovel ready sites. This goal and its four (4) objectives and nine (9) strategies address the need for the creation of additional inventory: pre-permitted building sites, office parks and buildings necessary to attract major employers to the city.

Objective 3.1: Increase available Shovel-Ready sited for Office Uses, Manufacturing, Research & Development, Distribution. The City has limited vacant land for development and needs to look to redevelopment as well.

Strategy 3.1.1: Work with landowners to develop sites for office, manufacturing, research and development, distribution

Shovel-Ready means having a developable site in a good location that is available, served by utilities, properly zoned, and prepared for use through appropriate planning and permitting."

Another definition is "project" or "shovel" ready are often used to describe land that can be ready for construction to begin in around six months where only some basic infrastructure will need to be provided before construction starts."

Objective 3.2: Identify key parcels that can be easily converted to shovel ready sites.

Strategy 3.2.1: Compile inventory of land and ownership of properties zoned and ready for detailed master site planning

Strategy 3.2.2: Meet with landowners/developers of larger land holdings to determine actions needed to develop shovel ready sites

Objective 3.3: Encourage development of Class “A” office and business parks at or near I-75.

Continue to work with Duke Realty and other private developers in the permitting and construction of Class A office space.

Strategy 3.3.1: Create policies that will expedite infrastructure for Class “A” office and business park investment

Strategy 3.3.2: Lead in the creation of public/private partnerships to prepare the City to attract business investment

Strategy 3.3.3: Develop ways the City can partner with developers to creatively structure financing for infrastructure needs and reduce impacts of regulatory demands

Objective 3.4: Encourage development of the US 27 Corridor for Industrial Uses.

The City is limited in industrial development lands and what opportunities exist are in the western portion of the City in proximity to the US 27 corridor.

Strategy 3.4.1: Explore US 27 corridor for industrial

Strategy 3.4.2: Collaborate with Bergeron Park of Commerce to fully develop

Strategy 3.4.3: Create a flexible Industrial Planned District

Existing Industry Program-Best Case Example

There are a few municipalities within Palm Beach County that have instituted Planned Industrial Development districts to promote a mix of industrial land uses in targeted areas. For example, the Town of Jupiter in a cooperative effort with Palm Beach Gardens, Mangonia Park, Riviera Beach, Lake Park and the County recently amended their Comprehensive Plan to create a Bioscience Research Protection Overlay.

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Goal 4: PROMOTE ECONOMIC REDEVELOPMENT THROUGHOUT THE CITY

Examine the older developed areas of the City which are under-utilized and in need of redevelopment. These areas include North Perry Airport, Senator Howard C Forman Health Services Campus, Broward Correctional Institution Property, South Florida Processing and Distribution Center and older residential and strip commercial sections of the city.

Redevelopment efforts have been identified for all three areas of the city. These efforts may include developing a Redevelopment Overlay District. The City has a great number of assets that are under-utilized and need to be re-examined for maximum potential uses. The activities in this goal will take collaboration with State and regional partners. This goal and its three (3) objectives and twenty-four (24) strategies address the need for redevelopment throughout the city.

Objective 4.1: Promote Redevelopment in the Eastern Section of the City. This includes the major commercial corridor.

Strategy 4.1.1: Work with Broward County Aviation on development opportunities at North Perry Airport that could include an Airport Overlay District

Strategy 4.1.2: Work with Broward County Aviation to improve aesthetics of its lands bordering major roadway corridors

Strategy 4.1.3: Explore development opportunities with Space Florida for North Perry Airport

Strategy 4.1.4: Promote Senator Howard C Forman Human Services Campus as a Health Park

Strategy 4.1.5: Prepare a detailed Master Plan to update the 2007 Howard Forman Health Services Concept Plan

Strategy 4.1.6: Partner with a Developer to fully plan and develop a Health oriented Business Park on the Senor Howard C Forman Services Campus

Strategy 4.1.7: Develop a Redevelopment Overlay District

Strategy 4.1.8: Develop a Redevelopment Plan for the older strip retail and commercial corridors

Strategy 4.1.9: Create Redevelopment Overlay to allow for expansion of site depths along University and Pines Blvd corridors including street closures

Strategy 4.1.10: Promote Mixed use redevelopment strategies to enhance economic development in commercial corridors

Strategy 4.1.11: Create a small neighborhood grant program to fund small community identified priority projects where residents take responsibility for the ongoing operation and maintenance

Strategy 4.1.12: Improve the aesthetic quality of common areas, medians and swales through improved landscaping and maintenance

Overlay Districts provide a means to incorporate various development regulations across a specified area. These districts are special zones that lie on top of existing zoning categories to supplement or supersede existing regulations. They usually provide a higher level of regulation than that required by the existing zoning classification, but they can also permit exceptions or require a less-restrictive guideline. In cases where conflicting standards are given by an overlay district and the underlying zoning category, those of the overlay district take priority. The boundaries of an overlay district may or may not coincide with the boundaries of the underlying zone, and an overlay district may contain parts of more than one existing zone.

Overlay districts are particularly useful to communities and municipalities because they allow existing zoning requirements to be superseded, when needed. Overlay districts can be implemented by passing a law that amends existing land use regulations, without having to go through the process of rewriting the underlying zoning requirements/regulations. Communities can also modify overlay districts without difficulty, should they decide to modify the requirements or coverage area.

(Strategy 4.1.9)

Atlantic Boulevard in Delray Beach, and the subsequent Development of Atlantic Grove, is a successful mixed use development with business fronting the road and residential access from the rear.



2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Objective 4.2: Promote Redevelopment in the Central Section of the City

Strategy 4.2.1: Continue to support development of City Center

Strategy 4.2.2: Promote City Center as the New Downtown. Do not begin to actively promote City Center until construction of facilities and building are approaching completion.

Strategy 4.2.3: Prepare a Medical District Plan for the area surrounding Memorial Hospital. This may include the development of a Medical District Overlay in the future.

Strategy 4.2.4: Collaborate with AT&T to move its storage facility away from the Shops at Pembroke Gardens. The current location of the existing AT&T storage facility is not the highest and best use and it limits the ability to create a large entertainment oriented district.

Strategy 4.2.5: Develop underutilized parcel next to City Center for regional uses

Strategy 4.2.6: Develop a Redevelopment Plan for the older strip retail and commercial corridors

Strategy 4.2.7: Create a small neighborhood grant program to fund small community identified priority projects where residents take responsibility for the ongoing operation and maintenance

Strategy 4.2.8: Improve the aesthetic quality of common areas, medians and swales through improved landscaping and maintenance

The purpose of the Medical Overlay District is to support the investment efforts of the various institutional uses located within the district by providing restrictions on those uses deemed incompatible with the future land uses anticipated in the area. The area is also intended to have a more urban, pedestrian - friendly, walkable character in the future, and therefore replacement standards that support this vision are included in the overlay district. Finally, mapped limitations on height will help reduce the impact of large scale uses on the surrounding neighborhoods.

Example: Marietta, Georgia. The Kennestone Hospital Overlay District is established to support an appropriate transition of medical-related uses to existing established residential neighborhoods, enhance the quality and compatibility of development, to establish consistent architectural and design guidelines, to encourage the most appropriate use of land, and to promote safe and efficient movement of traffic in and around the area surrounding Kennestone Hospital.

Objective 4.3: Promote Redevelopment in the Western Section of the City

Strategy 4.3.1: Prepare reuse and annexation plans for the Broward Correctional Institution Property

Strategy 4.3.2: Purchase South Florida Processing and Distribution Center

Strategy 4.3.3: Develop Reuse Plan for South Florida Processing and Distribution Center

Strategy 4.3.4: Improve the aesthetic quality of common areas, medians and swales through improved landscaping and maintenance.

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Goal 5: DEVELOP INFRASTRUCTURE FOR BALANCED GROWTH

Build on strengths and competitive advantages and provide the necessary infrastructure and services to support and enhance quality of life and economic growth to include roadway improvements at key interchanges, broadband and water and sewer enhancements, while also working with the County to address public transportation improvements.

Transportation and accessibility issues rank as top factors that businesses analyze when relocating. This goal mainly addresses the City's need to provide the necessary infrastructure (water/sewer, transportation, broadband) to sites that have the greatest possibility of being developed or redeveloped within the next five years. To achieve this goal, the EDSP identifies three (3) objectives and five (5) strategies.

Objective 5.1: Improve Infrastructure to encourage business growth and expansion. Transportation was expressed to be a major concern and the potential need for an integrated County wide transit system.

Strategy 5.1.1: Conduct an inventory of roadway deficiencies at key development sites

Strategy 5.1.2: Develop a Funding Plan to improve roadway deficiencies

Objective 5.2: Develop broadband to encourage business growth and expansion to key development sites

Strategy 5.2.1: Inventory current broadband capacity

Strategy 5.2.2: Meet with providers to explore methods of expanding and increasing coverage

Objective 5.3: Support and promote a comprehensive transportation plan for the City

Strategy 5.3.1: Collaborate with regional stakeholders to establish a comprehensive regional transit plan

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Goal 6: IMPROVE QUALITY OF LIFE-COMMUNITY DEVELOPMENT

Assist the City in determining its identity from that of a bedroom community to a business location. Market the City Center to give it a sense of “place” and diversify the retail, office and housing opportunities. Also, promote the strong assets of the City to include schools, municipal services, parks and recreation.

During the public interview process of the development of this EDSP, the interviewees voiced concerns about not having any cultural venues on the western portion of Broward County for large gatherings. This EDSP acknowledges the community’s desire for a sense of “place”, and which included cultural and entertainment amenities. This goal’s three (3) objectives and eight (8) strategies define the EDSP’s commitment to utilize resources of the city in its approach to expanding and diversifying the City’s economic base.

Objective 6.1: Develop a list of unmet amenities for the City to pursue

Strategy 6.1.1: Examine gaps in services i.e. theatres, bowling alleys, skating rinks, and other evening activity generating uses

Strategy 6.1.2: Promote Civic Center as a regional business venue and cultural asset

Strategy 6.1.3: Explore opportunities for additional art and cultural venues and events

Objective 6.2: Maintain a range of housing product

Strategy 6.2.1: Continue to promote a full range of housing products within the City

Strategy 6.2.2: Encourage housing density within the Central and Eastern sections of the City

Strategy 6.2.3: Encourage redevelopment of older housing inventory

Objective 6.2

A recent study by Strategic Planning Group, Inc., notes the impact of land development build-out and its impact on the economy. Basically stated, the report notes that no growth is negative to a community’s economic base. As noted in the 2012 Pinellas County Housing Market Study, “Pinellas County’s loss of population and limited vacant residential properties will continue to have a negative impact on employment and population growth To add population and not impact future job creating land uses, the County and its municipalities will need to redevelop older housing areas (and neighborhoods) that are functionally obsolete based on current and projected housing demand standards, most at workforce/affordable prices. This implies creating two or more units where one unit exists today in order to negate demolition or significant rehabilitation costs. Furthermore, the County’s redevelopment efforts need to address neighborhoods and communities that are predominately owner occupied, to ensure any conversion to rentals does not result in lower quality of life of existing residents. There appears to be an increasing demand for housing to be built in a work/live/shop environment closely linked with Transit Oriented Designed (TOD) developments”.

As referred in numerous articles and in SPG’s 2012 Pinellas County Housing Market Report, there are a number of housing products that can transition neighborhoods from single family to denser products like duplex, bungalow courts and townhouses.



Objective 6.3: Explore new municipal services to accommodate youth and the senior population

Strategy 6.3.1: Promote municipal services for the City’s aging population

Strategy 6.3.2: Promote after school amenities/services for the City’s younger population

EDSP Implementation Matrix

EDSP IMPLEMENTATION MATRIX						
ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	1 to 2 years	2 to 3 years	3 to 5 years	
GOAL 1: POSITION CITY IMAGE, BUSINESS CLIMATE AND BRAND FOR ECONOMIC DEVELOPMENT						
OBJECTIVE 1.1: Promote the business identity of the City						
Strategy 1.1.1: Promote the City as a place for business	City PED, City, MPPRC	Green	Green	Green	Green	City (General Budget)
Strategy 1.1.2: Create a new Brand (City is more than residential, retail and education)	City PED, City, MPPRC		Yellow			City (General Budget)
Strategy 1.1.3: Emphasis strategic regional location	City PED, City, MPPRC	Green	Green	Green	Green	City, MPPRC
Strategy 1.1.4: Promote Quality of Life (Education, Housing, Municipal Services, City Charter Schools, Arts and Culture)	City PED, City, MPPRC	Green	Green	Green	Green	City, MPPRC
Strategy 1.1.5: Promote City Center as the new Downtown	City PED, City, MPPRC	Green	Green	Green	Green	City, MPPRC
Strategy 1.1.6: Promote Civic Center as a regional business venue and cultural asset	City PED, City, MPPRC, GFLA, Broward ED	Green	Green	Green	Green	New City resources, MPPRC
OBJECTIVE 1.2: Maintain proactive City government						
Strategy 1.2.1: Continue to actively promote responsible growth	CC, City PED	Green	Green	Green	Green	City
Strategy 1.2.2: Approve and fund a 5 year Economic Development Plan and staffing (to include professional development funds)	CC, City PED		Yellow			City
Strategy 1.2.3: Adopt Vision of Balanced Growth	CC, City PED		Yellow			City
Strategy 1.2.4: Continue to support and fund infrastructure needs for economic growth	CC, City PED		Yellow	Yellow	Yellow	City, State, Federal
Strategy 1.2.5: Inform development community of regulatory changes, i.e. LDRs, Building Code etc.	EDB, City PED	Green	Green	Green	Green	City

Matrix Key

Yellow indicates implementation timeframe

Green indicates ongoing efforts

Acronyms Used

CC City Commission
City PED Planning and Economic Development Division
City TSD Technology Services Department
City PS Public Services Department
City CD Community Development Division
MPPRC Miramar-Pembroke Pines Chamber of Commerce
City General City Administration or other City Departments

BC Broward County
GFLA Greater Fort Lauderdale Broward Alliance
MPO Broward County Metropolitan Planning Organization
EDB Economic Development Advisory Board
PZB Planning and Zoning Advisory Board
ACB Arts and Culture Advisory Board
BCT Broward County Transit
BCA Broward County Aviation

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

EDSP IMPLEMENTATION MATRIX						
ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	1 to 2 years	2 to 3 years	3 to 5 years	
GOAL 2: POSITION THE CITY FOR ECONOMIC DEVELOPMENT						
OBJECTIVE 2.1: Promote available sites and buildings						
Strategy 2.1.1: Identify key sites and buildings for economic development opportunities	City PED, GFLA					City
Strategy 2.1.2: Develop plan to market land/building assets	City PED, GFLA					City
Strategy 2.1.3: Collaborate with commercial real estate brokers and the Greater Fort Lauderdale Alliance for updates of the data on the web directory of sites and buildings	City PED, GFLA					City, Brokers, GFLA
OBJECTIVE 2.2: Create innovative partnerships to support existing businesses and expansion						
Strategy 2.2.1: Work with businesses to create, attract and retain target industries	EDB, City PED, MPPRC					Existing staff resources
Strategy 2.2.2: Develop a comprehensive existing industry program to include a survey of existing businesses	EDB, City PED, MPPRC					Existing staff resources
Strategy 2.2.3: Explore options for collaborating with the private sector	EDB, City PED					Existing staff resources
Strategy 2.2.4: Increase the awareness of local, State and Regional resources to assist with retention, attraction and growth of value-added businesses	EDB, City PED, MPPRC					Existing resources
Strategy 2.2.5: Schedule regular meetings with commercial real estate brokers and conduct FAM tours	EDB, City PED, MPPRC					City, MPPRC
Strategy 2.2.6: Support Broward College Aviation Program for work force development	EDB, City PED, MPPRC, Broward College					City, Broward College, Broward Workforce Board
OBJECTIVE 2.3: Create a regulatory environment that embraces collaboration and cooperation						
Strategy 2.3.1: Identify and revise regulations that inhibit business growth	EDB, City PED, PZB, MPPRC					Existing resources
Strategy 2.3.2: Explore business friendly policies that encourage business attraction and retention	EDB, City PED, PZB, MPPRC					Existing resources
Strategy 2.3.3: Continue to work with other City departments to further streamline the development process	All City Depts.					Existing resources
OBJECTIVE 2.4: Evaluate current City economic development toolkit						
Strategy 2.4.1: Develop and adopt guidelines for awarding incentives	EDB, City ED, CC					New City resources
Strategy 2.4.2: Develop new incentives for existing and new businesses	EDB, City ED, CC					New City resources
Strategy 2.4.3: Explore using eminent domain for economic development	EDB, City ED, CC					Existing resources
Strategy 2.4.4: Explore creation of a business incubator with an institution of higher education	EDB, City ED, CC, MPPRC, Higher Education Institutions					New City resources, College, New State
Strategy 2.4.5: Conduct economic and fiscal impact analysis on land use and zoning changes	City ED, consultant					New City resources
OBJECTIVE 2.5: Evaluate Economic Development staffing and funding						
Strategy 2.5.1: Evaluate staffing plans based on the approved EDSP	EDB, City ED, CC					New City resources
Strategy 2.5.2: Promote professional development to include conferences, training and professional memberships (State and National)	EDB, City ED, CC					New City resources

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

EDSP IMPLEMENTATION MATRIX						
ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	1 to 2 years	2 to 3 years	3 to 5 years	
GOAL 3: DEVELOP PRODUCT-LAND and BUILDINGS						
OBJECTIVE 3.1: Increase available Shovel-Ready sites for Office Uses, Manufacturing, Research & Development, Distribution						
Strategy 3.1.1: Work with landowners to develop sites for office, manufacturing, research and development, distribution	City PED					New City resources, Private partners
OBJECTIVE 3.2: Identify key parcels that can be readily converted to shovel ready sites						
Strategy 3.2.1: Compile inventory of land and ownership of properties zoned and ready for detailed master site planning	City PED					Existing staff resources
Strategy 3.2.2: Meet with landowners/developers of larger land holdings to determine actions needed to develop shovel ready sites	City PED					Existing staff resources
OBJECTIVE 3.3: Encourage development of Class "A" office and business parks at or near I-75						
Strategy 3.3.1: Create policies that will expedite infrastructure for Class "A" office and business park investment	EDB, City PED, CC					Existing staff resources
Strategy 3.3.2: Lead in the creation of public/private partnerships to prepare the City to attract business investment	EDB, City PED, CC					Existing staff resources
Strategy 3.3.3: Develop ways the City can partner with developers to creatively structure financing for infrastructure needs and reduce impacts of regulatory demands	EDB, City PED, CC					New City Resources, Private partners
OBJECTIVE 3.4: Encourage development of the US 27 Corridor for industrial uses						
Strategy 3.4.1: Explore US 27 corridor for industrial	EDB, City PED, MPPRC					Existing staff resources
Strategy 3.4.2: Collaborate with Bergeron Park of Commerce to fully develop	EDB, City PED					Existing staff resources
Strategy 3.4.3: Create a flexible Industrial Planned District	EDB, City PED,PZB, CC					Existing staff resources

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

EDSP IMPLEMENTATION MATRIX						
ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	1 to 2 years	2 to 3 years	3 to 5 years	
GOAL 4: PROMOTE ECONOMIC REDEVELOPMENT THROUGHOUT THE CITY						
OBJECTIVE 4.1: Promote Redevelopment in the Eastern Section of the City						
Strategy 4.1.1: Work with Broward County Aviation on development opportunities at North Perry Airport that could include an Airport Overlay District	City PED, GFLA, BCA					Broward County, BCA, State, Federal, Space Florida
Strategy 4.1.2: Work with Broward County Aviation to improve aesthetics of its lands bordering major roadway corridors	City PED, GFLA, BCA					Broward County, BCA, State, Federal, Space Florida
Strategy 4.1.3: Explore development opportunities with Space Florida for North Perry Airport	City PED, Space Florida, BCA					Broward County, BCA, State, Federal, Space Florida
Strategy 4.1.4: Promote Senator Howard C Forman Human Services Campus as a Health Park	City PED, State, Federal, MPPRC					City, State, Federal
Strategy 4.1.5: Prepare a detailed Master Plan to update the 2007 Howard Forman Health Services Concept Plan	City PED, State, Federal, MPPRC					City, State, Federal
Strategy 4.1.6: Partner with a Developer to fully plan and develop a Health oriented Business Park on the Senor Howard C Forman Services Campus	City PED, State of FL, Private Developer					City, State, Federal, Private partner
Strategy 4.1.7: Develop a Redevelopment Overlay District	EDB, City PED, PZB					City staff resources
Strategy 4.1.8: Develop a Redevelopment Plan for the older strip retail and commercial corridors	EDB, City PED, PZB, Consultant					New City resources
Strategy 4.1.9: Create Redevelopment Overlay to allow for expansion of site depths along University and Pines Blvd corridors including street closures.	EDB, City PED, PZB					City resources
Strategy 4.1.10 Promote mixed use redevelopment strategies to enhance economic development in commercial corridors	City PED					Existing staff resources
Strategy 4.1.11 Create a small neighborhood grant program to fund small community identified priority projects where residents take responsibility for the ongoing operation and maintenance	City CD					City, CDBG
Strategy 4.1.12 Improve the aesthetic quality of common areas, medians and swales through improved landscaping and maintenance	CC, City PS, City PED					New City resources

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

		EDSP IMPLEMENTATION MATRIX				
ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	1 to 2 years	2 to 3 years	3 to 5 years	
GOAL 4: PROMOTE ECONOMIC REDEVELOPMENT THROUGHOUT THE CITY						
OBJECTIVE 4.2: Promote Redevelopment in the Central Section of the City						
Strategy 4.2.1: Continue to support development of City Center	City, MPPRC					City, MPPRC
Strategy 4.2.2: Promote City Center as the New Downtown	City, MPPRC					City, MPPRC
Strategy 4.2.3: Prepare a Medical District Plan for the area surrounding Memorial Hospital	City, Memorial Hospital					New City resources, Memorial Hospital
Strategy 4.2.4: Collaborate with AT&T to move its storage facility away from the Shops at Pembroke Gardens	City, AT&T					New City resources, AT&T
Strategy 4.2.5: Develop under utilized parcel next to City Center for regional uses	City, County					New City resources, County
Strategy 4.2.6: Develop a Redevelopment Plan for the older strip retail and commercial corridors	EDB, City PED,PZB, Consultant					New City resources
Strategy 4.2.7 Create a small neighborhood grant program to fund small community identified priority projects where residents take responsibility for the ongoing operation and maintenance	City CD					City, CDBG
Strategy 4.2.8 Improve the aesthetic quality of common areas, medians and swales through improved landscaping and maintenance	CC, City PS, City PED					New City resources
OBJECTIVE 4.3: Promote Redevelopment in the Western Section of the City						
Strategy 4.3.1: Prepare reuse and annexation plans for the Broward Correctional Institution Property	City PED					New staff resources
Strategy 4.3.2: Purchase South Florida Processing and Distribution Center	City, US Post Office					New City resources
Strategy 4.3.3: Develop Reuse Plan for South Florida Processing and Distribution Center	City, US Post Office, Consultant					New City resources
Strategy 4.3.4 Improve the aesthetic quality of common areas, medians and swales through improved landscaping and maintenance	CC, City PS, City PED					New City resources

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

EDSP IMPLEMENTATION MATRIX						
ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	1 to 2 years	2 to 3 years	3 to 5 years	
GOAL 5: DEVELOP INFRASTRUCTURE FOR BALANCED GROWTH						
OBJECTIVE 5.1: Improve infrastructure to encourage business growth and expansion						
Strategy 5.1.1: Conduct an inventory of roadway deficiencies at key development sites	City PED, City PS, MPO					New City Resources, MPO
Strategy 5.1.2: Develop a Funding Plan to improve roadway deficiencies	City PED, MPO, City PS					City, County, State, Federal
OBJECTIVE 5.2: Develop broadband to encourage business growth and expansion to key development sites						
Strategy 5.2.1: Inventory current broadband capacity	City PED, City TSD, Broadband Providers					New City resources
Strategy 5.2.2: Meet with providers to explore methods of expanding and increasing coverage	City PED, City TSD, Broadband Providers					Existing City resources
OBJECTIVE 5.3: Support and promote a comprehensive transportation plan for the City						
Strategy 5.3.1: Continue to collaborate with regional stakeholders to establish a comprehensive regional transit plan	BCT					City, MPO, BCT, State, Federal

EDSP IMPLEMENTATION MATRIX						
ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	1 to 2 years	2 to 3 years	3 to 5 years	
GOAL 6: IMPROVE QUALITY OF LIFE-COMMUNITY DEVELOPMENT						
OBJECTIVE 6.1: Develop a list of unmet amenities for the City to pursue						
Strategy 6.1.1: Examine gaps in services i.e. theatres, bowling alleys, skating rinks, and other evening activity generating uses	City ED, MPPRC					Existing staff resources
Strategy 6.1.2: Promote Civic Center as a regional business venue and cultural asset	City, MPPRC					New City resources, MPPRC
Strategy 6.1.3: Explore opportunities for additional art and cultural venues and events	City, MPPRC, ACB					New City resources
OBJECTIVE 6.2: Maintain a range of housing product						
Strategy 6.2.1: Continue to promote a full range of housing products within the City	City CD, Private Developers					Existing staff resources
Strategy 6.2.2: Encourage housing density within the Central and Eastern sections of the City	City, PZB					Existing staff resources
Strategy 6.2.3: Encourage redevelopment of older housing inventory	City, PZB					Existing staff resources
OBJECTIVE 6.3: Explore new municipal services to accommodate youth and the senior population						
Strategy 6.3.1: Promote municipal services for the City's aging population	City					Existing and New City resources
Strategy 6.3.2: Promote after school amenities/services for the City's younger population	City					Existing and New City resources



APPENDICES

APPENDIX 1: Pembroke Pines Labor & Workforce Statistics



Greater Fort Lauderdale Alliance
 800-741-1420
 954-524-3113
info@gfalliance.org

Labor Force

Labor Force Report (Pembroke Pines, Florida)

Total Establishments	5,807
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Total Employees	55,859
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Total Establishments by Size (2013)

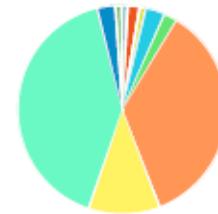
- 1-4 Employees
- 5-9 Employees
- 10-19 Employees
- 20-49 Employees
- 50-99 Employees
- 100-249 Employees
- 250-499 Employees
- 500-999 Employees
- 1000+ Employees



	TOTAL	%
1-4 Employees	3,787	65.21
5-9 Employees	1,039	17.89
10-19 Employees	510	8.78
20-49 Employees	296	5.10
50-99 Employees	87	1.50
100-249 Employees	67	1.15
250-499 Employees	14	0.24
500-999 Employees	5	0.09
1000+ Employees	3	0.05

Total Employees by Major SIC (2013)

- Agricultural, Forestry, Fishing (SIC Range 01-09)
- Mining (SIC 10-14)
- Construction (SIC 15-17)
- Manufacturing (SIC 20-39)
- Transportation and Communications (SIC 40-49)
- Wholesale Trade (SIC 50-51)
- Retail Trade (SIC 52-59)



	TOTAL	%
Agricultural, Forestry, Fishing (SIC Range 01-09)	466	0.83
Mining (SIC 10-14)	1	0.00
Construction (SIC 15-17)	1,100	1.97
Manufacturing (SIC 20-39)	448	0.80
Transportation and Communications (SIC 40-49)	1,654	2.96
Wholesale Trade (SIC 50-51)	1,177	2.11
Retail Trade (SIC 52-59)	19,843	35.52
Finance, Insurance And Real Estate (SIC 60-69)	6,174	11.05
Services (SIC 70-89)	22,813	40.84
Public Administration (SIC 90-98)	1,652	2.96
Unclassified (SIC 99)	530	0.95

Total Businesses by Establishment Type (2013)

	TOTAL	%
Agriculture, Forestry and Fishing	8	0.14
Agricultural Services	75	1.29
Coal and Ore Mining	0	0.00
Oil and Gas	0	0.00
General Construction	83	1.43
Heavy Construction	137	2.36
Food Manufacturing	4	0.07
Tobacco Manufacturing	0	0.00
Textile Mills	2	0.03
Apparel and Textile Manufacturing	1	0.02
Lumber and Wood Production	3	0.05
Furniture Manufacturing	0	0.00
Paper Manufacturing	0	0.00
Printing and Publishing	20	0.34
Chemicals	2	0.03
Petroleum Refining	1	0.02
Rubber and Plastics	3	0.05

Total Employees by Establishment Type (2013)

	TOTAL	%
Agriculture, Forestry and Fishing	13	0.02
Agricultural Services	453	0.81
Coal and Ore Mining	0	0.00
Oil and Gas	1	0.00
General Construction	469	0.84
Heavy Construction	631	1.13
Food Manufacturing	19	0.03
Tobacco Manufacturing	0	0.00
Textile Mills	26	0.05
Apparel and Textile Manufacturing	20	0.04
Lumber and Wood Production	4	0.01
Furniture Manufacturing	0	0.00
Paper Manufacturing	0	0.00
Printing and Publishing	49	0.09
Chemicals	15	0.03
Petroleum Refining	2	0.00
Rubber and Plastics	159	0.28

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Pembroke Pines Labor and Workforce

Leather Manufacturing	1	0.02	Leather Manufacturing	4	0.01
Stone, Glass, and Concrete	1	0.02	Stone, Glass, and Concrete	10	0.02
Metals Fabrication	5	0.09	Metals Fabrication	24	0.04
Machinery and Equipment Manufacturing	23	0.40	Machinery and Equipment Manufacturing	116	0.21
Transportation	85	1.46	Transportation	1,073	1.92
Travel Services	35	0.60	Travel Services	100	0.18
Transport Services	14	0.24	Transport Services	47	0.08
Communications	72	1.24	Communications	325	0.58
Utilities	9	0.15	Utilities	109	0.20
Durables Wholesale	154	2.65	Durables Wholesale	983	1.76
Non Durables Wholesale	37	0.64	Non Durables Wholesale	194	0.35
Building Materials, Hardware and Garden	53	0.91	Building Materials, Hardware and Garden	570	1.02
General Merchandise Stores	56	0.96	General Merchandise Stores	2,215	3.97
Food Markets	33	0.57	Food Markets	1,882	3.37
Convenience Stores	22	0.38	Convenience Stores	97	0.17
Other Food Stores	69	1.19	Other Food Stores	419	0.75
Auto Dealers and Gas Stations	87	1.50	Auto Dealers and Gas Stations	2,073	3.71
Clothing Stores	138	2.38	Clothing Stores	1,550	2.77
Furniture Stores	30	0.52	Furniture Stores	257	0.46
Home Furnishings	26	0.45	Home Furnishings	188	0.34
Electronics and Computer Stores	49	0.84	Electronics and Computer Stores	377	0.67
Music Stores	7	0.12	Music Stores	45	0.08
Restaurants	244	4.20	Restaurants	5,949	10.65
Other Food Service	85	1.46	Other Food Service	1,119	2.00
Bars	14	0.24	Bars	75	0.13
Drug Stores	52	0.90	Drug Stores	580	1.04
Liquor Stores	12	0.21	Liquor Stores	84	0.15
Specialty Stores	278	4.79	Specialty Stores	2,132	3.82
Catalog and Direct Sales	24	0.41	Catalog and Direct Sales	231	0.41
Banks and Financial Institutions	234	4.03	Banks and Financial Institutions	1,359	2.43
Insurance Carriers	20	0.34	Insurance Carriers	416	0.74
Insurance Agents and Brokers	163	2.81	Insurance Agents and Brokers	2,034	3.64
Real Estate	280	4.82	Real Estate	2,365	4.23
Hotels and Lodging	11	0.19	Hotels and Lodging	239	0.43
Dry Cleaning and Laundry	47	0.81	Dry Cleaning and Laundry	137	0.25
Beauty and Barber Shops	226	3.89	Beauty and Barber Shops	1,105	1.98
Other Personal Service	100	1.72	Other Personal Service	359	0.64
Advertising	19	0.33	Advertising	752	1.35
Computer Services	56	0.96	Computer Services	230	0.41
Other Business Services	216	3.72	Other Business Services	968	1.73
Auto Repair/Services	102	1.76	Auto Repair/Services	429	0.77
Miscellaneous Repair Services	57	0.98	Miscellaneous Repair Services	152	0.27
Motion Pictures	50	0.86	Motion Pictures	151	0.27
Entertainment and Recreation Services	89	1.53	Entertainment and Recreation Services	622	1.11
Health and Medical Services	908	15.64	Health and Medical Services	6,070	10.87
Hospitals	111	1.91	Hospitals	3,894	6.97
Legal Services	116	2.00	Legal Services	360	0.64
Primary and Secondary Education	48	0.83	Primary and Secondary Education	3,271	5.86
Colleges and Universities	11	0.19	Colleges and Universities	116	0.21
Social Services	84	1.45	Social Services	826	1.48
Child Care Services	43	0.74	Child Care Services	628	1.12
Museums and Zoos	0	0.00	Museums and Zoos	0	0.00
Membership Organizations	120	2.07	Membership Organizations	495	0.89
Professional Services	290	4.99	Professional Services	1,620	2.90
Government	69	1.19	Government	1,652	2.96
Unclassified Establishments	248	4.27	Unclassified Establishments	530	0.95

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Pembroke Pines Labor and Workforce

Total Employees by Occupation (2013)		
	TOTAL	%
Executive, Managers, and Administrators	5,043	9.03
Business and Financial Operations	1,836	3.29
Computer and Mathematical Occupations	581	1.04
Architecture and Engineering	326	0.58
Life/Physical/Social Science Occupations	110	0.20
Community and Social Services	533	0.95
Legal	856	1.53
Education/Training/Library	2,618	4.69
Health Diagnosing and Treating Practitioners	2,854	5.11
Health Technologists/Technicians	1,183	2.12
Healthcare Support	2,147	3.84
Protective Services	920	1.65
Food Preparation/Serving	4,271	7.65
Building and Grounds Maintenance	2,786	4.99
Personal Care and Service	1,983	3.55
Sales	9,593	17.17
Office and Administrative Support	9,109	16.31
Farming/Fishing/Forestry	135	0.24
Construction and Extraction	2,184	3.91
Installation/Maintenance and Repair Workers	1,900	3.40
Production Workers	1,161	2.08
Transportation Workers	1,764	3.16
Material Moving	749	1.34

Source: Applied Geographic Solutions, 2013

APPENDIX 2: Stakeholder Responses

**PEMBROKE PINES
ECONOMIC DEVELOPMENT STRATEGIC PLAN**

ECONOMIC DEVELOPMENT VISION OF THE FUTURE

1. WHAT TYPES OF BUSINESSES DRIVE THE LOCAL (CITY AND ITS IMMEDIATE SUPPORTING/SURROUNDING REGION) ECONOMY?

Retail, Pembroke Lakes Mall, Pembroke Gardens, lots of retail	Restaurants
Restaurants	Retail
Parks-CB Smith, Water Park, Dog Parks, Everglades in close proximity	Food
Schools and Hospitals-Q of L issues residents and visitors seek; colleges, charter schools, religious schools	Services, Insurance etc.
Grocery Stores- farmers market, Aldi, Traders Joes, Whole Foods, Fresh Market	Contractors roofers, carpets etc.
Grocery stores	Education, colleges
Home Improvement Stores	Construction
Department Stores	Retail
Restaurants	Healthcare
Medical Facilities (DR. offices, hospitals, urgent care centers)	Government
Medical and related	Restaurants
Consumer stores	Quick Food Restaurants
Restaurants	Food Stores
Educational Facilities	All retail services (Banks, hardware, etc.)
Construction/light industry	Grocery
Further advancement of repurposing properties previously leased/owned, i.e. Home Depot became Walmart	Restaurant
Retail, particularly National Corp. or franchises	Retail
Professional offices (health professions and financial)	Service
Commercial distribution centers and regional national offices	Retail
National Corporate Headquarters	Small business (Mom and Pop)
Retail shopping	Restaurants
Grocery/Pharmacy	Healthcare
	Financial Institutions
	Retail Establishments
	Restaurants and Food Establishments
	Business Services
	Automotive Sales and Services
	Financial Services
	Retail
	Regional Office
	Satellite education
	Medical
	Aviation

PEMBROKE PINES
ECONOMIC DEVELOPMENT STRATEGIC PLAN

ECONOMIC DEVELOPMENT VISION OF THE FUTURE

2. DO YOU BELIEVE THE LOCAL ECONOMY NEEDS TO DIVERSIFY? IF SO, WHAT TYPES OF BUSINESSES/JOBES WOULD YOU LIKE TO SEE ADDED TO THE LOCAL ECONOMY:

Need more professional offices and light industrial/manufacturing
North Perry Airport is expanding-bringing high paying jobs
STEM Programs are focusing on high paying professional jobs
Need to build on our rich mix of cultures, languages to diversify
Need partnerships with schools and businesses to help us grow
Light Ind. And corporate HQ in Bergeron Park-some shopping centers could be Corp. HQ
Technology related industry
Art/entertainment industries
No more chain drugstores, pizza places- need more business diversity
Further advancement of repurposing properties previously leased/owned, i.e. Home Depot became Walmart
Retail, particularly National Corp. or franchises
Professional offices (health professions and financial)
Commercial distribution centers and regional national offices
National Corporate Headquarters
Corporate Headquarters (Accounting, Marketing, IT)
Specialized retail (Tractor Supply Company)
Stores/Businesses/Events that encourage healthy living
More companies involved in international trade import/export
Light manufacturing
Shipping and logistics
Business consulting
Business Incubator
Research and Development
Corporate
Pharmaceutical
No-we need to take care of what we have and not try to cram more in

Light Industrial
Manufacturing
Manufacturing
Corporate Hubs and Offices
Executive level jobs
Film or Fashion industries due to central location between Ft. Laud. And Miami
Software Engineering
Regional Headquarter Offices
Warehousing/Distribution Operations
Financial Services-Main/Regional Headquarters
Health & Medical Services
Technology Companies
Expansion for medical in conjunction with education rather than continuing to add smaller satellite campus'
Regional office growth
Specialized retail district on smaller parcels (i.e. art district)

**PEMBROKE PINES
ECONOMIC DEVELOPMENT STRATEGIC PLAN**

ECONOMIC DEVELOPMENT VISION OF THE FUTURE

3. LIST THE REASONS (IF ANY) THAT YOU FEEL ECONOMIC DEVELOPMENT IS IMPORTANT TO THE CITY?

- | | |
|--|--|
| <p>ED is fuel required for the City to grow.
City Admin. needs to focus on the current needs not being met by business and then help to plan for future goals to attract business
ED needs to look at the real numbers, real stats, real life realities to get businesses here.
ED needs to work with the elderly/senior population to determine their needs
Proximity to the tri-county area for job opportunities
No current ED Plan to follow
Eastern section needs to be revitalized (along Pines Blvd. west of Palm Ave.)
Need to address the NW corner of North Perry Airport with IL
Broader tax base
Increase in local jobs
Helps to modernize/improve older areas of the City
Maintain quality city services
Improve and maintain infrastructure
Stabilize tax base
Pride
Economic stability for the City (Jobs, Shopping, etc)
Tax Revenue
As the economic viability of the city increases, home prices increase allowing for more income for the City.
Job creation
Attract new businesses to the city
Attract new residents to the city
Tax revenue increases
More business for the local businesses
Assures long term viability</p> | <p>Attracts residents/visitors
Housing prices increase
Services to the residents
Jobs
Housing
Maintain Balance/Retail-Residential-Manufacturing
Keep value of property up
Maintain a stable tax base
For growth
Public Safety
Building Better Community
City has highly educated and skilled population/workforce
High-wage jobs created would help to sustain the City's available talent pool
Attain a desirable balance between ad valorem tax revenue generated from homeowners and local businesses.
Maintain the City's current high quality of life for residents and visitors
Economic sustainability in Pembroke Pines and the region
Provide for a local, good paying job market to negate traveling out for the city for employment
Diversify the tax base away from residential sources of revenue
Allow for retail up and down cycles while providing stability in other sectors
Provide a stable real estate market by stabilizing tax revenues and allowing the City to invest in infrastructure
Attracting high paying jobs helps to stability in residential real estate and strong property values</p> |
|--|--|

PEMBROKE PINES
ECONOMIC DEVELOPMENT STRATEGIC PLAN

ECONOMIC DEVELOPMENT VISION OF THE FUTURE

4. WHAT ARE THE CITY'S STRONGEST ASSETS OR STRENGTHS IN ATTRACTING NEW BUSINESSES?

- | | |
|---|---|
| Easy access via I-75, turnpike and major roadways to the airports and ports | Schools |
| Stable, diversified and economically strong population | Good location in South Florida |
| Low crime, strong police presence, fabulous fire dept/EMS, top hospitals and medical services | Shopping and entertainment |
| Lovely and varied neighborhoods- reasonably prices | Geographic location-easy access to highways |
| Schools-public, private, charter and religious | Proximity to 2 major cities |
| Strong Median Income | Ethnic diversity |
| Strong and very diverse population | The Residents |
| Relatively young housing units | Low Crime Rate |
| Very strong retail market | Streamline Permitting |
| Close proximity to Miami-Dade County | Variable Housing options |
| Strong N/S transportation corridors (Turnpike, I-75, US 27) | Local workforce |
| Availability of many types of housing | Great School System |
| Highly rated schools | Industry specific to attract businesses |
| Low crime rate | Building relations with local organizations such as the Broward Alliance |
| Stable govt. services | City recognition nationwide |
| Quality of development, both commercial and residential | City's Quality of Life |
| Maintenance of streetscape and roadways | Location |
| Fiscal Stability | High quality, educated and well-trained workforce |
| Pride of citizens of our city | Available commercial real estate |
| PP is a busy, thriving community | Access to major thoroughfares and highways |
| Infrastructure/Roadways | Geographically central to 2 air ports and seaport, and commuter airport |
| Parks/Recreation | Strong demographics (income and minority growth) |
| Large customer base | Strong school system |
| Close proximity to Miami-Dade County and Ft. Lauderdale and Miami airports | Planning and Economic Development Division staff |
| Quality of life | Major highway access with US 27, I-75, turnpike connecting to other regional highways |
| Safety | No State Income Tax |

PEMBROKE PINES
ECONOMIC DEVELOPMENT STRATEGIC PLAN

ECONOMIC DEVELOPMENT VISION OF THE FUTURE

5. WHAT ARE THE CITY'S BIGGEST LIABILITIES FOR ECONOMIC DEVELOPMENT OR REDEVELOPMENT?

- | | |
|--|--|
| Condo commandoes | Little effort in promoting city nationally and internationally |
| Apathy in bringing businesses here | Not enough support for international trade |
| Heavy Traffic on Pines Blvd. (I-75 flyover needed) | Little manufacturing or warehousing |
| Lack of Eminent Domain ability by the City | Strong competition from Miramar and other Broward cities |
| Lack of Industrial/Business Parks along I-75 | Limited area for building and growth |
| Too many strip centers backing up to SF residential | No mass transit |
| Lack of proper buffers between strip centers and residential zones | Lack of entertainment options |
| Lack of commitment by City and Admin. on making PP a landscape friendly city | Many years of poor planning in development |
| Lack of funds | Traffic |
| A diversity of ideas making formulation of a success plan difficult | Traffic |
| Unmanageable traffic-too many D & F roads | Traffic |
| Inefficient public transit system | Poor roadways not built correctly |
| Need a broader base of community facilities-parks | Building owners not reinvesting in their property |
| Arts and cultural events/open space/recreational facilities | Eminent Domain is not currently an option |
| Lack of public transportation | Small Industrial land available |
| Non recognition as a significant municipality in the South FL community | Incentives for Businesses |
| Inadequate east- west roadways | Funding for redevelopment |
| Stronger financial relationships needed with national banking and wall street corporations | Technology |
| Lack of high quality resort/residence hotel establishment | No viable economic development strategic plan for the past 5 years |
| Lack of headquarter companies for professional | No clearly defined redevelopment plan |
| Need to expand data line capacity for businesses and residents (Broadbanding) | Application of zoning and development ordinances and policies to both aging and newer communities which respond differently to certain regulations |
| Need access through 184 th to open western side of Pembroke to Weston | Fractured approach to attracting enterprise (That's why we're here) |
| Traffic getting worse | Limited funding to acquire eastern properties and orchestrate a redesign of existing parcels |
| | Perception (Albeit an unfair one) that the city is not business friendly due to codes, planning and zoning processes |
| | No brand. Many taglines but there is not a cohesive marketing strategy defining who we are and what we want to be |
| | Transportation |

PEMBROKE PINES
ECONOMIC DEVELOPMENT STRATEGIC PLAN

ECONOMIC DEVELOPMENT VISION OF THE FUTURE

6. WHAT ARE SOME OF THE OPPORTUNITIES (10 YEARS OUT) THAT COULD HELP THE CITY'S ECONOMIC DEVELOPMENT POTENTIAL?

- | | |
|--|---|
| <p>Continue to work with COC's, Broward Alliance and other local, countywide , state, national organizations to determine what is working elsewhere</p> <p>Connect schools with IBM's and other businesses to train/educate the young folks to stay here</p> <p>City needs to stay engaged with existing businesses to keep them</p> <p>Planning and Economic Division staff has bright, attractive, dynamic speakers that represent the City well—give them the credit for what they do for the City</p> <p>Traffic issues- need mass transit</p> <p>Exercise Eminent Domain</p> <p>Plan for elevated rail system from US 1 along Hollywood/Pines Blvd. west to US 27</p> <p>Build MF apartments and TH along Pines Blvd in spaces occupied by car dealerships</p> <p>Make US 27 a major highway with a possible rail component</p> <p>Develop Perry Airport as a transportation hub for small aircraft</p> <p>Depends on the planning foresight of the current city personnel</p> <p>Meaningful incentives for larger employers to re-locate</p> <p>Arts and culture presence</p> <p>High rise development along I-75 corridor</p> <p>High speed rail connector along I-75 corridor</p> <p>Industrial Park</p> <p>Expand 184th north through Southwest Ranches to Bonaventure in Weston</p> | <p>Ensure data line expansion for future use</p> <p>Increase leasing wireless pole space on City owned land for additional revenue</p> <p>International trade opportunities for exporting</p> <p>A trade center in the city</p> <p>International Business Incubator</p> <p>Infrastructure for international trade</p> <p>Attract younger families</p> <p>Getting a better control now on what we have</p> <p>Get City Center Project finalized</p> <p>East/West Traffic flow needs relief</p> <p>Stronger incentives to shop local</p> <p>Better Public Transportation</p> <p>Resources to support incentive programs</p> <p>Investing in the youth to open businesses in the city/working with the colleges and universities to develop programs</p> <p>Focus on international market opportunities</p> <p>Identify key targeted industries for the City</p> <p>Create a business recruitment plan w/ performance metrics</p> <p>Provide adequate funding to support economic development</p> <p>Establish a small business incubator for local entrepreneurs</p> <p>Port Expansions/ Panama Canal</p> <p>City Center completed build out</p> <p>I-75 Pembroke Road full interchange development</p> <p>Continued cost pressures on Miami Dade corporate and regional office. (SW Broward provides a savings opportunity while maintaining proximity to Miami Dade</p> |
|--|---|

**PEMBROKE PINES
ECONOMIC DEVELOPMENT STRATEGIC PLAN**

ECONOMIC DEVELOPMENT VISION OF THE FUTURE

7. WHAT ARE THE GREATEST THREATS (10 YEARS OUT) TO THE CITY IN ACHIEVING ITS ECONOMIC DEVELOPMENT POTENTIAL?

- | | |
|---|---|
| Failing to anticipate the needs of the growing international community | Traffic issues with new housing units |
| Failing to support the fire and police departments with new equipment and training | Rising costs for services |
| Not dealing with traffic issues | Aging population |
| Failing to keep/attract the best and brightest with STEM and other educational programs | Too "retail driven" |
| Failing to make our citizens responsible for doing their part to attract new businesses | No mass transit |
| Lack of political will to execute any plan that would mean higher taxes (ED, Revitalization, streetscape, eminent domain) | Not taking care of what we have |
| Chronically congested roads | Residential communities running down |
| Too much high-density housing | Services not kept up |
| Lack of Open space | If East side cannot be upgraded |
| Lack of Water supply | Over-population and traffic |
| Degradation of existing water treatment and sewer system | Another housing value dip or dive |
| Traffic | Federal and State Grants not being available |
| Inadequate Code Enforcement | Lack of viable economic development strategic plan |
| Imprudent financial decisions | Lack of funding to support business development and recruitment |
| Failing to recognize the necessity of the internet and wireless services and what this means to businesses. | Plummeting housing values |
| Not expanding grid roadways to allow traffic through to Weston | Poor leadership |
| Keeping the permit process streamlined to allow for easy tracking and speed | Failure to establish viable strategic partnerships to support City's economic development plan |
| | Retail Development in Western Davie (Davie Commons) Project currently dead but any revival would dilute demand for Pines "midtown" retail |
| | Bottlenecked east/west transportation arteries |
| | Pension costs that can adversely impact property tax rates |

ADDITIONAL COMMENTS

Pembroke Pines chose to be a residential community. Residents MUST be kept happy to support the businesses they need. Businesses will come because of our residents. Let's not let businesses run OUR city.

APPENDIX 3: Broward County 2010 Target Industries



Table 3.a.3(3) - Clusters industry components ranking

NAICS	Potential Broward County Empl. Gain Rank	Potential Broward County HS/HW Gain Rank	Oper. Profit Typ FI Unit %/emp Index Rank	FL avg hrly wage \$ Rank	Econ. Dev. effort Return on invest. Yrs Rank	Avg. Score	Final Rank	Potential Broward County Empl. Gain	Potential Broward County HS/HW Gain
PRINCIPAL TARGETS									
ADVANCED MATERIALS & HI-TECH MFG.									
424610 - Plastics Materials and Basic Forms and Shapes Merchant Wholesalers	6	2	2	1	1	2.4	1	186	186
326121 - Unlaminated Plastics Profile Shape Mfg.	5	5	1	5	6	4.4	2	229	
326130 - Laminated Plastics Plate, Sheet (except Packaging), and Shape Mfg.	10	5	3	2	2	4.4	2	79	
327320 - Ready-Mix Concrete Mfg.	2	1	10	4	6	4.6	4	418	418
326220 - Rubber and Plastics Hoses and Belting Mfg.	7	5	6	6	4	5.6	5	145	
326160 - Plastics Bottle Mfg.	8	5	9	3	3	5.6	5	123	
326150 - Urethane and Other Foam Product (except Polystyrene) Mfg.	3	5		7	8	5.8	7	266	
326199 - All Other Plastics Product Mfg.	1	5	5	9	11	6.2	8	2,875	
327332 - Concrete Pipe Mfg.	12	4		8	4	7.0	9	50	50
326140 - Polystyrene Foam Product Mfg.	4	5	8	10	10	7.4	10	262	
327390 - Other Concrete Product Mfg.	11	3	4	11	9	7.6	11	55	55
326299 - All Other Rubber Product Mfg.	9	5	7	12	12	9.0	12	109	
ALTERNATIVE ENERGY & RENEWABLE RESOURCES									
221122 - Electric Power Distribution	1	1	12	2	5	4.2	1	2,518	2,518
541690 - Other Scientific and Technical Consulting Services	6	5	2	5	4	4.4	2	332	332
541310 - Architectural Services	4	3	3	6	7	4.6	3	623	623
541330 - Engineering Services	7	6	8	4	3	5.6	4	240	240
221119 - Other Electric Power Generation	15	8		1	1	6.3	5	95	95

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Broward County 2010 Target Industries, cont.



Table 3.a.3(3) - Clusters industry components ranking

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541620 - Environmental Consulting Services	5	4	5	11	9	6.8	6	396	396
541380 - Testing Laboratories	3	2	7	15	19	9.2	7	669	669
221111 - Hydroelectric Power Generation	20	12		3	2	9.3	8	47	47
221310 - Water Supply and Irrigation Systems	9	7	1	16	14	9.4	9	240	240
541320 - Landscape Architectural Services	19	11	4	8	5	9.4	9	57	57
334519 - Other Measuring and Controlling Device Mfg.	10	15	9	9	7	10.0	11	228	
334413 - Semiconductor and Related Device Mfg.	2	15	14	7	18	11.2	12	1,183	
334515 - Instrument Mfg. for Measuring and Testing Electricity and Electrical Signals -	8	15	13	12	11	11.8	13	240	
334512 - Automatic Environmental Control Mfg. for Residential, Commercial, and Appliance Use	14	15		10	9	12.0	14	107	
541370 - Surveying and Mapping (except Geophysical) Services	16	9	6	18	16	13.0	15	93	93
334513 - Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	17	15	10	13	12	13.4	16	90	
562112 - Hazardous Waste Collection	21	13		14	12	15.0	17	43	43
334514 - Totalizing Fluid Meter and Counting Device Mfg.	12	15	11	20	19	15.4	18	120	
541360 - Geophysical Surveying and Mapping Services	18	10		19	16	15.8	19	62	62
221320 - Sewage Treatment Facilities	22	14		17	15	17.0	20	31	31
541420 - Industrial Design Services	13	15		21	19	17.0	21	108	

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Broward County 2010 Target Industries, cont.



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562910 - Remediation Services	11	15		22	22	17.5	22	141	
AVIATION / AEROSPACE									
334511 - Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Mfg.	2	4	3	1	1	2.2	1	891	
336411- Aircraft Mfg.	1	1		2	5	2.3	2	1,309	1,309
336413 - Other Aircraft Parts and Auxiliary Equipment Mfg.	3	2	1	4	3	2.6	3	404	404
336412 - Aircraft Engine and Engine Parts Mfg.	4	3	2	3	2	2.8	4	246	246
488111 - Air Traffic Control	5	4		5	4	4.5	5	5	
GLOBAL BUSINESS SERVICES									
541511 - Custom Computer Programming Services	4	3	6	4	10	5.4	1	2,409	2,409
541513 - Computer Facilities Mgmt. Services	9	8		2	5	6.0	2	721	721
541512 - Computer Systems Design Services	6	5	7	3	9	6.0	2	2,305	2,305
522110 - Commercial Banking	1	1		9	15	6.5	4	7,268	7,268
524113 - Direct Life Insurance Carriers	3	2	12	8	12	7.4	5	2,428	2,428
522220 - Sales Financing	17	13	3	6	3	8.4	6	124	124
524130 - Reinsurance Carriers	18	14		1	1	8.5	7	64	64
522210 - Credit Card Issuing	13	10	5	12	6	9.2	8	297	297
524126 - Direct Property and Casualty Insurance Carriers	5	4	11	11	16	9.4	9	2,312	2,312
541519 - Other Computer Related Services	14	11	4	13	7	9.8	10	260	260
522190 - Other Depository Credit Intermediation	19	15		5	2	10.3	11	60	60

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Broward County 2010 Target Industries, cont.



Table 3.a.3(3) - Clusters industry components ranking

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541211 - Offices of Certified Public Accountants	12	18	1	10	11	10.4	12	518	
522291 - Consumer Lending	11	9	2	15	17	10.8	13	588	588
524298 - All Other Insurance Related Activities	16	18		7	3	11.0	14	126	
541613 - Marketing Consulting Services	7	6		16	18	11.8	15	959	959
524127 - Direct Title Insurance Carriers	15	12	10	14	8	11.8	15	154	154
522130 - Credit Unions	8	7		19	19	13.3	17	865	865
522294 - Secondary Market Financing	20	16	8	17	12	14.6	18	40	40
541910 - Marketing Research and Public Opinion Polling	10	18	9	20	20	15.4	19	603	
541214 - Payroll Services	2	18		21	21	15.5	20	2,581	
425110 - Business to Business Electronic Markets	21	17		18	14	17.5	21	23	23
GLOBAL MEDIA & PRODUCTION									
515120 - Television Broadcasting	4	3	7	1	1	3.2	1	344	344
541810 - Advertising Agencies	3	2	1	9	8	4.6	2	369	369
541820 - Public Relations Agencies	7	6	4	5	5	5.4	3	190	190
515111 - Radio Networks	10	8		4	2	6.0	4	90	90
518210 - Data Processing, Hosting, and Related Services	1	1	9	6	14	6.2	5	1,440	1,440
515112 - Radio Stations	5	4	5	10	9	6.6	6	304	304
515210 - Cable and Other Subscription Programming	11	9	8	3	2	6.6	6	78	78
518112 - Web Search Portals	8	7		8	7	7.5	8	118	118
541830 - Media Buying Agencies	15	12		2	2	7.8	9	40	40
512110 - Motion Picture and Video Production	2	13	2	11	13	8.2	10	682	
516110 - Internet Publishing and Broadcasting	14	11		7	6	9.5	11	46	46
541850 - Display Advertising	11	9	6	13	11	10.0	12	78	78
541860 - Direct Mail Advertising	6	5	10	15	15	10.2	13	263	263

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Broward County 2010 Target Industries, cont.



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512191 – Teleproduction & Other Postproduction Services	9	13		12	10	11.0	14	93	
512199 – Other Motion Picture and Video Industries	16	13	3	14	12	11.6	15	25	
541930 - Translation and Interpretation Services	13	13		16	16	14.5	16	60	
HQ & MANAGEMENT OPERATIONS									
551114 - Corporate, Subsidiary, and Regional Managing Offices	1	1		2	5	2.3	1	12,453	12,453
551111 - Offices of Bank Holding Companies	6	4	1	1	1	2.6	2	165	165
541611 - Administrative Management and General Management Consulting Services	3	2	3	4	4	3.2	3	985	985
541612 - Human Resources Consulting Services	4	3	4	5	6	4.4	4	651	651
541618 - Other Management Consulting Services	8	5	2	7	3	5.0	5	78	78
532420 – Office Machinery and Equipment Rental and Leasing	9	6	5	3	2	5.0	5	22	22
813920 - Professional Organizations	5	7	6	6	8	6.4	7	529	
813930 - Labor Unions and Similar Labor Organizations	2	7		9	9	6.8	8	1,091	
813940 - Political Organizations	7	7		8	7	7.3	9	118	
HUMAN RESOURCES DEVELOPMENT & HIGHER EDUCATION									
611430 – Professional and Management Development Training	4	1		1	1	1.8	1	174	174
611310 – Colleges, Universities and Professional Schools	1	3	2	2	4	2.4	2	8,631	
611620 - Sports and Recreation Instruction	3	3		4	3	2.6	3	228	
611410 – Business and Secretarial Schools	6	2		3	2	3.3	4	81	81

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Broward County 2010 Target Industries, cont.



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611691 - Exam Preparation and Tutoring	5	3	1	5	5	3.8	5	163	
611610 - Fine Arts Schools	2	3	3	6	6	4.0	6	348	

INT'L TRADE & LOGISTICS

423430 - Computer and Computer Peripheral Equip. & Software Merchant Wholesalers	1	1	8	2	16	5.6	1	1,553	1,553
541614 - Process, Physical Distrib., and Logistics Consulting Svcs.	17	14	2	1	1	7.0	2	344	344
423690 - Other Electronic Parts and Equipment Merchant Wholesalers	20	17	9	4	3	10.6	3	318	318
423510 - Metal Service Centers and Other Metal Merchant Wholesalers	16	13	12	9	8	11.6	4	372	372
424420 - Packaged Frozen Food Merchant Wholesalers	13	10	19	13	10	13.0	5	437	437
488510 - Freight Transportation Arrangement	3	2	4	23	36	13.6	6	963	963
423810 - Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers	7	6	27	10	23	14.6	7	551	551
423840 - Industrial Supplies Merchant Wholesalers	8	7	10	19	32	15.2	8	549	549
423930 - Recyclable Material Merchant Wholesalers	6	5	1	29	37	15.6	9	633	633
423610 - Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	25	22	23	6	5	16.2	10	181	181
423110 - Automobile and Other Motor Vehicle Merchant Wholesalers	14	11	22	21	15	16.6	11	430	430
424710 - Petroleum Bulk Stations and Terminals	22	19	38	5	3	17.4	12	214	214
423720 - Plumbing and Heating Equip. & Supplies Merchant Wholesalers	33	29	21	7	5	19.0	13	88	88
423820 - Farm and Garden Machinery and Equipment Merchant Wholesalers	5	4	15	33	39	19.2	14	664	664

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Broward County 2010 Target Industries, cont.



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423420 - Office Equipment Merchant Wholesalers	24	21	31	12	10	19.6	15	194	194	
423490 - Other Prof'l. Equip. & Supplies Merchant Wholesalers	29	25	5	24	17	20.0	16	114	114	
423710 - Hardware Merchant Wholesalers	26	23	10	25	17	20.2	17	149	149	
423410 - Photographic Equipment and Supplies Merchant Wholesalers	42	37	18	3	2	20.4	18	20	20	
423730 - Warm Air Heating and Air-Conditioning Equip. & Supplies Merchant Wholesalers	36	32	16	11	9	20.8	19	69	69	
424410 - General Line Grocery Merchant Wholesalers	11	9	39	15	30	20.8	19	527	527	
423310 - Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers	9	8	32	22	35	21.2	21	531	531	
424910 - Farm Supplies Merchant Wholesalers	10	39	17	14	27	21.4	22	529		
424120 - Stationery and Office Supplies Merchant Wholesalers	18	15	29	26	19	21.4	22	329	329	
424490 - Other Grocery and Related Products Merchant Wholesalers	4	3	25	36	40	21.6	24	728	728	
424130 - Industrial and Personal Service Paper Merchant Wholesalers	21	18	35	20	15	21.8	25	261	261	
423120 - Motor Vehicle Supplies and New Parts Merchant Wholesalers	19	16	13	35	27	22.0	26	324	324	
424810 - Beer and Ale Merchant Wholesalers	15	12	37	28	19	22.2	27	395	395	
424430 - Dairy Product (except Dried or Canned) Merchant Wholesalers	23	20	39	18	13	22.6	28	204	204	
424110 - Printing and Writing Paper Merchant Wholesalers	38	34	28	8	7	23.0	29	67	67	
424950 - Paint, Varnish, and Supplies Merchant Wholesalers	12	39	14	30	23	23.6	30	464		
423740 - Refrigeration Equip. & Supplies Merchant Wholesalers	37	33	24	16	12	24.4	31	68	68	

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Broward County 2010 Target Industries, cont.



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424920 - Book, Periodical, and Newspaper Merchant Wholesalers	2	39	6	41	43	26.2	32	1,091	
423920 - Toy and Hobby Goods and Supplies Merchant Wholesalers	32	28	3	38	32	26.6	33	104	104
423320 - Brick, Stone, and Related Construction Material Merchant Wholesalers	35	31	7	34	27	26.8	34	74	74
424440 - Poultry and Poultry Product Merchant Wholesalers	41	36	30	17	13	27.4	35	38	38
423130 - Tire and Tube Merchant Wholesalers	27	24	34	31	25	28.2	36	147	147
423390 - Other Construction Material Merchant Wholesalers	30	26	36	32	25	29.8	37	106	106
424450 - Confectionery Merchant Wholesalers	39	35	33	26	19	30.4	38	56	56
424480 - Fresh Fruit and Vegetable Merchant Wholesalers	34	30	20	40	38	32.4	39	79	79
423140 - Motor Vehicle Parts (Used) Merchant Wholesalers	31	27		39	34	32.8	40	105	105
424930 - Flower, Nursery Stock, and Florists Supplies Merchant Wholesalers	28	39	26	43	42	35.6	41	118	
423520 - Coal and Other Mineral and Ore Merchant Wholesalers	43	38		37	31	37.3	42	15	15
488310 - Port and Harbor Operations	40	39		42	41	40.5	43	49	
LIFE SCIENCES									
541710 - Research and Development in the Physical, Engineering, and Life Sciences	1	1	1	3	6	2.4	1	4,545	4,545
325413 - In-Vitro Diagnostic Substance Manufacturing	7	4		2	2	3.8	2	218	218
325412 - Pharmaceutical Preparation Manufacturing	3	2	6	5	4	4.0	3	332	332
325411 - Medicinal and Botanical Manufacturing	8	5	2	4	3	4.4	4	197	197

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Broward County 2010 Target Industries, cont.



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334510 - Electromedical and Electrotherapeutic Apparatus Mfg.	2	6	4	6	5	4.6	5	349	
339115 - Ophthalmic Goods Manufacturing	9	6	7	1	1	4.8	6	60	
339112 - Surgical and Medical Instrument Manufacturing	4	6	3	7	7	5.4	7	278	
334516 - Analytical Laboratory Instrument Mfg.	6	6	4	8	8	6.4	8	243	
325414 - Biological Product (except Diagnostic) Mfg.	5	3		9	9	6.5	9	251	251
MARINE									
811219 - Other Electronic and Precision Equipment Repair and Maintenance –	3		1	1	1	1.5	1	96	
336611 - Ship Building and Repairing	1		2	2	2	1.8	2	316	
336612 - Boat Building	2		3	3	3	2.8	3	152	
SUPPLEMENTAL TARGETS									
ENHANCED TOURISM									
561591 - Convention and Visitors Bureaus	4	1		1	1	1.8	1	77	77
721120 - Casino Hotels	2	2		3	3	2.5	2	903	
721110 - Hotels and Motels	1	2	1	4	5	2.6	3	3,232	
721199 - All Other Traveler Accommodation	5	2		2	2	2.8	4	30	
721191 - Bed-and-Breakfast Inns	3	2		5	4	3.5	5	104	
HEALTH CARE									
621111 - Offices of Physicians (except Mental Health Specialists)	2	2	3	1	1	1.8	1	3,655	3,655
621112 - Offices of Physicians, Mental Health Specialists	5	3	1	3	2	2.8	2	50	50
622110 - General Medical and Surgical Hospitals	1	1	5	2	5	2.8	3	19,724	19,724

2014-2019 ECONOMIC DEVELOPMENT STRATEGIC PLAN

Broward County 2010 Target Industries, cont.



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NAICS	Potential Broward County Empl. Gain Rank	Potential Broward County HS/HW Gain Rank	Oper. Profit Typ FI Unit %/emp Index Rank	FL avg hrly wage \$ Rank	Econ. Dev. effort Return on invest. Yrs Rank	Avg. Score	Final Rank	Potential Broward County Empl. Gain	Potential Broward County HS/HW Gain
339116 - Dental Laboratories	3	4	2	5	4	3.6	4	84	
339114 - Dental Equipment and Supplies Manufacturing	4	4	4	4	3	3.8	5	79	