

RESOLUTION No. 18-143

A RESOLUTION OF THE MAYOR AND THE CITY COUNCIL OF THE CITY OF DORAL, FLORIDA, ACCEPTING THE CITY OF DORAL WORKFORCE HOUSING MASTER PLAN; AUTHORIZING THE PREPARATION OF LEGISLATION TO AMEND THE WORKFORCE HOUSING PROGRAM; AND PROVIDING FOR AN EFFECTIVE DATE

WHEREAS, the City of Doral (the “City”) has identified the provision of workforce housing as a high priority in its Comprehensive Plan; and

WHEREAS, in 2016, the City adopted Ordinance No. 2016-13 establishing standards for implementing the City’s Workforce Housing Program; and

WHEREAS, in 2017, the City adopted an eight-month moratorium on the application of the City’s Workforce Housing Program, codified in Section 74-886-893 of the Land Development Code; and

WHEREAS, in 2018, the Workforce Housing Program Moratorium was extent for three-month to provide an opportunity to complete the Housing Master Plan; and

WHEREAS, the purpose of the Workforce Housing Master Plan is to provide recommendations and guidance on the implementation of workforce housing strategies to be considered as part of one or more ordinances at a later time; and

WHEREAS, on August 8, 2018, a workshop was held with the Mayor and City Council to discuss the Plan’s recommendations; and

WHEREAS, staff recommends that the City Mayor and the City Council accept the City’s Workforce Housing Master Plan, as provided in Exhibit “A”.

NOW, THEREFORE, BE IT RESOLVED BY THE MAYOR AND CITY COUNCIL OF THE CITY OF DORAL, FLORIDA, AS FOLLOWS:

Section 1. Recitals. The foregoing recitals are confirmed, adopted, and incorporated herein and made a part hereof by this reference.

Section 2. Adoption. The City of Doral Workforce Housing Master Plan, a copy attached hereto as Exhibit "A", which is incorporated herein and made a part hereof, is hereby accepted.

Section 3. Authorization. The City Manager and the City Attorney are hereby authorized to prepare such ordinance(s) as may be necessary to implement the strategies of the Workforce Housing Master Plan, recognizing that such ordinance(s) will amend the City's Workforce Housing Program and end the moratorium associated therewith, upon adoption.

Section 4. Effective Date. This Resolution shall take effect immediately upon adoption.

The foregoing Resolution was offered by Vice Mayor Rodriguez who moved its adoption. The motion was seconded by Councilmember Mariaca and upon being put to a vote, the vote was as follows:

Mayor Juan Carlos Bermudez	Yes
Vice Mayor Ana Maria Rodriguez	Yes
Councilman Pete Cabrera	Yes
Councilwoman Christi Fraga	Absent/Excused
Councilwoman Claudia Mariaca	Yes

PASSED AND ADOPTED this 22 day of August, 2018.



JUAN CARLOS BERMUDEZ, MAYOR

ATTEST:



CONNIE DIAZ, OMC
CITY CLERK

APPROVED AS TO FORM AND LEGAL SUFFIENCY
FOR THE USE AND RELIANCE OF THE CITY OF DORAL ONLY:



WEISS, SEROTA, HELFMAN, COLE & BIERMAN, P.L.
CITY ATTORNEY

EXHIBIT “A”

City of Doral

Housing Master Plan

Revised Draft

June 11, 2018



Prepared by

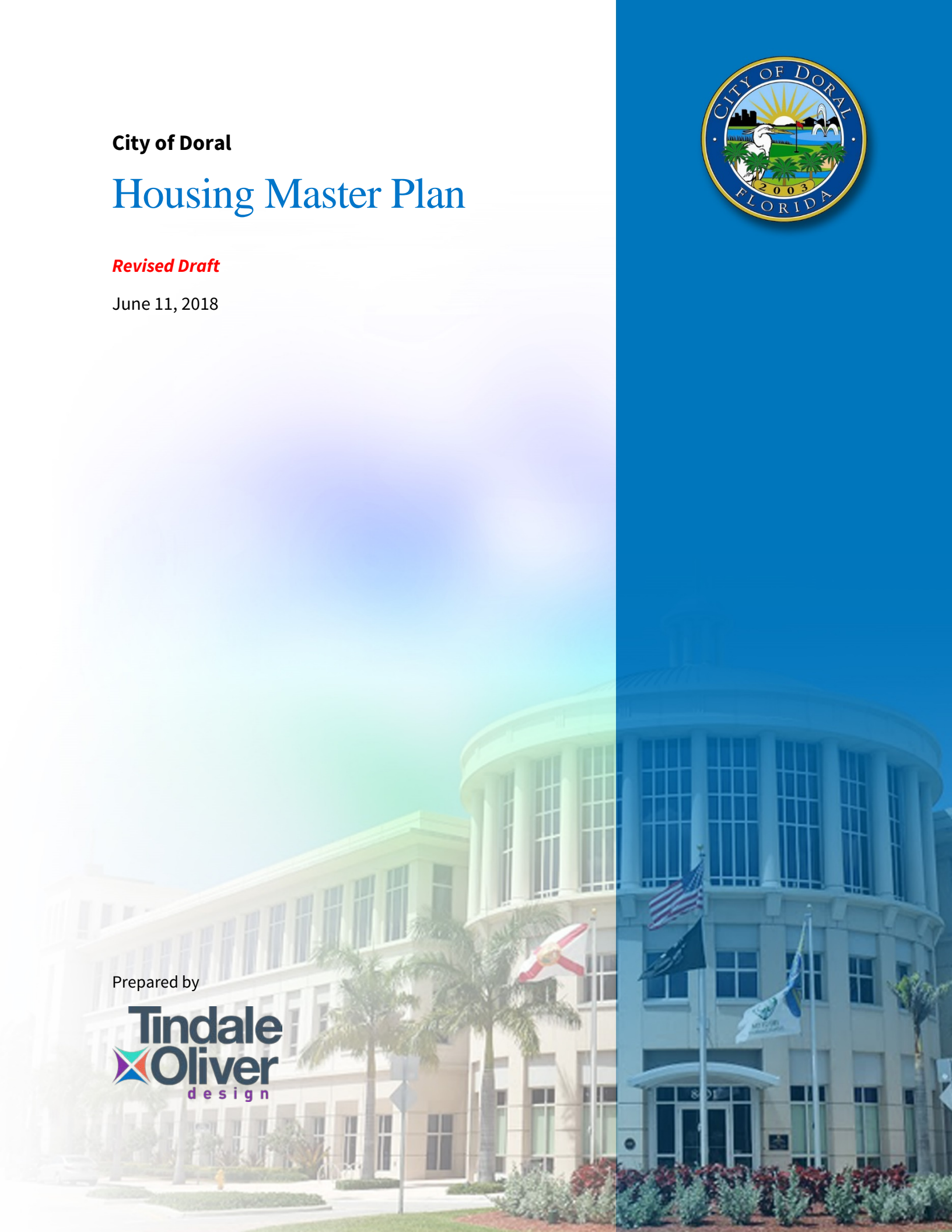




Table of Contents

Section 1 Executive Summary	1-1
1.1 Introduction	1-1
1.2 The Case for Workforce Housing	1-1
1.3 Defining Workforce Housing	1-2
1.4 Doral’s Housing Situation	1-2
1.5 Location Analysis	1-3
1.6 Workforce Housing Strategies	1-4
1.7 Performance Metrics	1-4
1.8 Managing a Workforce Housing Program	1-5
1.9 Recommendations	1-5
Section 2 Introduction	2-1
2.1 Background	2-1
2.2 Key Takeaways for 2.0	2-4
Section 3 The Case for Workforce Housing	3-1
3.1 Economic Development	3-1
3.2 Community	3-2
3.3 Key Takeaways for 3.0	3-2
Section 4 Defining Workforce Housing	4-1
4.1 Typical Definitions of Workforce Housing	4-1
4.2 Workforce Housing Definition for Doral’s Housing Master Plan	4-1
4.3 Key Takeaways for 4.0	4-1
Section 5 Doral’s Housing Situation	5-1
5.1 Target Workforce and Family Salaries	5-1
5.2 Housing Affordability and Availability for Households	5-4
5.3 General Growth and Development Considerations	5-8
5.4 Key Takeaways for 5.0	5-11
Section 6 Location Analysis	6-1
6.1 Property Search Methodology	6-1
6.2 Existing Land Use and Zoning	6-2



6.3	Future Land Use	6-7
6.4	Improvement to Land Value	6-9
6.5	Key takeaways for 6.0	6-12
Section 7 Workforce Housing Strategies		7-1
7.1	Implementation Considerations	7-1
7.2	Inclusionary Zoning and In-Lieu Fees.....	7-1
7.3	Density Bonus.....	7-2
7.4	Other Incentives	7-4
7.5	Linkage Fees	7-5
7.6	Affordable Homeownership Programs	7-5
7.7	Community Lands Trusts.....	7-5
7.8	Kay Takeaways for 7.0.....	7-6
Section 8 Performance Metrics		8-1
8.1	Key Takeways for 8.0.....	8-1
Section 9 Managing a Workforce Housing Program		9-1
9.1	Key Takeaways for 9.0.....	9-2
Section 10 Recommendations		10-1
	Primary Recommendations.....	10-1
	Secondary Recommendations	10-2
	Endnotes.....	10-4

Appendices

Appendix A – Initial Assessment and Analysis Memo

Appendix B – Public Outreach Summary

List of Figures

Figure 2-1: Median Household Income Regional Comparison	2-2
Figure 2-2: Future Population Growth.....	2-2
Figure 2-3: Miami-Dade County Employment Growth.....	2-3
Figure 2-4: Doral Inflow/Outflow Job Counts in 2014.....	2-4
Figure 3-1: Apartments in Doral CityPlace	3-1
Figure 3-2: Intergenerational Community.....	3-2



Figure 5-1: Target Sub-Industry Average Annual and Workforce Housing Income Range.....5-2

Figure 5-2: Family vs. Non –Family Households in the City of Doral (Since 2007)5-4

Figure 5-3: Burdened Households5-5

Figure 5-4: Housing Tenure (Ownership vs. Rental)5-5

Figure 5-5: New Residential Units 2017–20215-9

Figure 5-6: Projected Population Based on New Residential Units5-9

Figure 7-1: Mixed-Use Development.....7-5

Figure 7-2: Community Land Trust.....7-6

List of Tables

Table 5-1: Government Occupation Salaries and Workforce Housing Income Range.....5-1

Table 5-2: Target Sub-Industry Average Annual Wage Estimates within Workforce Income Range5-3

Table 5-3: Income by Percentage of Median Family Income and Persons per Household5-4

Table 5-4: AMI and Housing Cost- Based on Area Median Income5-6

Table 5-5: New Unit Sizes Affordable in Workforce Income Range5-7

Table 5-6: Median Size of Housing Units5-7

Table 5-7: Affordability Thresholds for Rental Units5-8

Table 5-8: Mean and Median Apartment Rents by Unit Type5-8

Table 5-9: Projection of New Units 2017-20215-9

Table 6-1: Doral Boulevard Study Area Existing Land Use6-4

Table 6-2: Brownfield Study Area Existing Land Use6-4

Table 6-3: Doral Design District Core Study Area Existing Land Use.....6-5

Table 6-4: Doral Boulevard Study Area Current Zoning6-5

Table 6-5: Brownfield Study Area Current Zoning6-7

Table 6-6: Doral Design District Core Study Area Current Zoning.....6-7

Table 6-7: Doral Blvd. Study Area Future Land Use6-9

Table 6-8: Brownfield Study Area Future Land Use6-9

Table 6-9: Doral Blvd. Study Area Property Value Characteristics.....6-11

Table 6-10: Brownfield Study Area Property Value Characteristics.....6-11

Table 6-11: Doral Design District Core Study Area Property Value Characteristics.....6-11

Table 7-1: Miami-Dade WHDB Program Density Bonuses for Developments Over 20 Units.....7-3

Table 7-2: Density Provisions for Palm Beach County Workforce Housing Program.....7-3

Table 7-3: Developer Profit before, during, and after Density and Other Bonuses Provided to Mitigate Costs of Workforce Housing (WFH) Provision (100% On-Site Example)7-4

List of Maps

Map 5-1: Location of Approved Developments5-10

Map 6-1: Target Areas – Existing Land Uses6-3

Map 6-2: Target Areas – Current Zoning.....6-6

Map 6-3: Target Areas – Future Land Use.....6-8



Map 6-4: Target Areas – Improvement Value to Land Value.....6-10



SECTION 1 EXECUTIVE SUMMARY

This Workforce Housing Master Plan was developed for the City of Doral to facilitate the provision of housing by the private sector that is affordable for both public workers and workers in targeted sub-industries currently commuting from other parts of Miami-Dade County and the region, as well as those who will find themselves working in Doral as the economy continues to grow and diversify. The Master Plan provides recommendations related to workforce housing implementation guidance and strategies based on the findings from background research and technical analysis. The following provides the key takeaways from the main sections of the Master Plan.

1.1 INTRODUCTION

This section provides an introduction to the Housing Master Plan (Master Plan) and background demographic, socioeconomic, and economic development information to contextualize the mismatch between place of work and place of residence for the vast majority of Doral's workers. Key takeaways include the following:

- Doral's population is expected to continue to grow through 2030. The City's Comprehensive Plan anticipates a 2030 population of 103,421 residents, a nearly 74% increase in population over the 2016 estimate of 59,304 from the Bureau of Economic and Business Research (BEBR) at the University of Florida. This growth will continue to create pressure for new housing, although nearly all of that growth will need to occur in the form of redevelopment, as there is little vacant land within the City limits.
- Doral is considered one of the most important and significant sub-economies in Miami-Dade County, with potential for future growth in sub-industries related to manufacturing, distribution and transportation, services, and information, design, and media.
- According to 2015 American Community Survey (ACS) estimates, Doral's median annual income is \$72,933, one of the highest in Miami-Dade County and nearly \$30,000 more than Miami-Dade County's median annual income of \$43,129.
- Doral is experiencing a severe jobs/housing mismatch—nearly 76% of workers living in Doral work outside of the city, and nearly 94% of the jobs within the city are filled by workers who do not live there. This mismatch creates a situation that requires workers to commute into and out of the city, generating high levels of regional traffic.

1.2 THE CASE FOR WORKFORCE HOUSING

This section makes the case for why the City has identified the provision of workforce housing as a response to the jobs/housing mismatch identified in Doral. Key takeaways include the following:

- Findings from a 2007 national survey conducted by Harris Interactive of more than 300 companies found that more than half of the largest companies believed they had insufficient



affordable housing nearby, and two-thirds of these companies believed this lack had a negative effect on retention of entry- and mid-level employees.

- Doral aims to spur economic development and foster an inter-generational sense of community by providing affordable housing for its workforce during every phase of life.
- By accounting for certain factors in workforce housing implementation, such as neighborhood context, housing structure and design, housing management and administration, and geographic dispersion, the City of Doral can minimize risks of decreased property values.

1.3 DEFINING WORKFORCE HOUSING

This section identifies the target worker population for workforce housing in Doral and the target workforce housing income range. Key takeaways include the following:

- The targeted workforce populations for the Housing Master Plan are public workers and young professionals in key sub-industries identified as targets for continued economic development.
- The associated target workforce housing annual income range is 60–150% Area Median Income (AMI), based on analysis completed in the following section.

1.4 DORAL'S HOUSING SITUATION

This section summarizes key findings from the technical and background data analysis on income and housing affordability and availability. Key takeaways include the following:

- The majority of base salaries for City of Doral occupations (including Police), Miami-Dade Fire Rescue occupations with the most workers, and teachers of various experience levels fall in the workforce housing income range (88%, 80%, and 100%, respectively). The proposed workforce income range thus captures salaries of public workers who are in single-income households making the minimum salary, which likely includes workers just starting out in their careers.
- In total, 72% of average annual wage estimates for sub-industries targeted for economic development in a recently-completed Florida International University (FIU) Metropolitan Center report fall in the workforce housing range. Again, the range likely would capture a sizable number of workers in these sub-industries living in single-income households.
- The proposed workforce income range includes adjustments for family size that roughly helps account for varying household sizes based on families.
- The 2015 ACS (2011–2015) estimates that 34% of mortgage-paying households are cost-burdened (paying more than 30% of income on housing) and that 57% of rental households in Doral are cost-burdened. These percentages are fairly consistent with those for Miami-Dade County as a whole, although the county's percentage of rent-burdened households is higher,



at 62%. Considering that the Miami metro area was rated the most rent-burdened metro area in the US in 2015 by the NYU Furman Center, these levels of rent burden are particularly high.

- When considering all housing types, there are more than 100 times more units available at the highest income level than at the lowest income level within the workforce housing range. However, in absolute terms, the number of units available for those making incomes in the proposed workforce range is relatively low. These findings signal a strong need for affordable units.
- Compared to other housing types, there is a greater number of condos valued at an affordable price for those in the proposed workforce range (although the number is still low in an absolute sense). Additionally, the size of condo units that have been built is closer to estimated affordable unit sizes when compared to other housing types. This finding suggests that these types of units might be easier to subsidize to achieve more workforce housing when compared to other owner-occupied unit types.
- Focusing on multi-family housing may facilitate the provision of workforce housing, and focusing particularly on rental in the near-term will allow for the timely provision of units. Yet it is important that in focusing on this housing type, the City still ensures housing that can accommodate the variety of sizes among qualifying households. This likely can be accomplished through provisions such as those in the current Workforce Housing Density Bonus (WHDB) program that requires the unit size mix of workforce units to match that of the market-rate unit mix in a mixed-income development. In this way, the market can help determine how many of each size unit to provide.
- There are currently 9,629 units planned/approved to be built through 2021 in Doral. The City estimates that this will house an estimated 24,073 new residents, which is nearly 55% of the projected population increase through 2030. The City should evaluate any opportunities to include workforce housing in currently approved developments.

1.5 LOCATION ANALYSIS

This section provides an analysis to show where workforce housing would be feasible and desirable in the city. Key takeaways include the following:

- The City will protect existing single-family neighborhoods by not allowing multi-family housing or additional density within these neighborhoods.
- The limited amount of vacant land available for development (4.5%) emphasizes the need to focus on denser multi-family units for the provision of workforce housing, as well as the need to look at opportunities for infill and redevelopment, particularly along commercial corridors and the designated brownfield area.
- The City can use its land use and zoning authority, as well as its ability to provide additional incentives and target programs, to facilitate workforce housing in identified areas of opportunity, which may be based on areas identified in the preliminary location analysis



completed in this section. Potential areas of focus studied in this analysis include properties along Doral Boulevard, the City's brownfield area, and the Doral Design District Core (located approximately in the area south of NW 36th St between NW 82nd Ave and SR 826; note that residential is not allowed for the Design District areas outside of the Core with an Industrial future land use designation).

1.6 WORKFORCE HOUSING STRATEGIES

This section provides background information on workforce housing implementation strategies tailored to the unique context of Doral and the findings from the analysis of previous sections. Key takeaways include the following:

- Mandated inclusionary zoning programs with in-lieu fees and accompanying incentives have shown to be effective in the provision of workforce housing. Density bonuses often are used and have been shown to be effective in maintaining the profitability of development. Other effective incentives include direct subsidies, tax abatements, and reduced parking requirements.
- Fee waivers and discounts or incentives used without mandatory requirements have not been shown to be effective in the provision of workforce housing.
- Linkage fees have some constraints in the amount of revenue they can generate for workforce housing, but they can be used with an inclusionary zoning policy.
- Revenue from workforce housing strategies such as in-lieu and linkage fees can supplement State and federal revenues for existing homeownership programs in Doral.
- Community land trusts help lower the land value costs of housing and are advantageous for workforce homeownership, as the subsidy provided can aid multiple qualifying homebuyers.

1.7 PERFORMANCE METRICS

This section provides performance metrics to measure success of the workforce strategies. Key takeaways include the following:

-
- To define and measure success of implementation of the Workforce Housing Master Plan, the City should establish a target of maintaining at least as much rental stock affordable to those with incomes in the workforce housing range as is currently available. A detailed follow-up study is needed to establish the level of rental units in the city that are currently affordable to those with incomes in this range to determine the appropriate baseline.
- If the City eventually includes for-purchase housing as a focus, it can take a similar approach of maintaining a baseline number of units affordable to those with incomes in the workforce income range. Currently, approximately 28% of for-purchase units in the city are affordable to those with incomes in this range.



- The City should track the number of affordable units, both for-purchase and rental, over time as part of implementation of the Master Plan. This information will help measure the success of reaching the target, provide information for any evaluation of shifting from maintaining the stock affordable at workforce incomes to increasing that stock as a percentage of total units, and provide information for any evaluation of including for-purchase units as a focus. Tracking strategies might include an annual web survey of rental unit prices, annual price reporting by new rental developments, and tracking just value of for-purchase units.

1.8 MANAGING A WORKFORCE HOUSING PROGRAM

This section provides guidance on management of the workforce housing program, including development review, in-lieu fee collection and expenditures, and workforce unit tracking. Key takeaways include the following:

- In the short term, the City should designate a member of the Planning & Zoning team to manage the workforce housing program as it gets underway, with the intent of creating a staff position committed to this program within two years of its inception. This, along with the existing supporting staff and processes already in place, will provide the necessary oversight needed for the initial years of operation to carry out management as described in Section 9.0. However, each program evolves differently, and it is important that the City evaluate the program on an annual basis to ensure that the necessary staffing is being provided to maintain an efficient and effective program.

1.9 RECOMMENDATIONS

This section provides final recommendations for the City of Doral's Housing Master Plan, including the following:

- **Primary Recommendations**
 - The workforce housing program should focus on public employees and professionals working within target industries.
 - Adopt a workforce housing income range of 60–150% AMI.
 - Direct policy/regulatory solutions toward future non-single-family development types.
 - Prioritize solutions as mid-and long-term since it likely to take years to realize a significant impact.
 - Identify tools for targeting workforce housing provision to areas of opportunity in the city, which may include commercial corridors, the brownfield area, the Doral Design District Core (which excludes District areas outside the Core with an industrial future land use designation where housing is not allowed), and in the longer term, annexation areas.
 - Adopt a mandated inclusionary zoning program with a density bonus incentive and in-lieu fee option.



- Consider additional incentives such as subsidies, tax abatements, and reduced parking requirements.
- Designate a Planning & Zoning staff member to oversee the workforce housing program at the start, with a plan to create a committed staff position within two years.
- **Secondary Recommendations**
 - Consider adopting a linkage fee in conjunction with the inclusionary zoning program.
 - Evaluate existing homeownership assistance programs that might support workforce housing.
 - Consider areas that might eventually be served by a community land trust.



SECTION 2 INTRODUCTION

This Master Plan aims to address the need for workforce housing within the city of Doral. (For a discussion of how workforce housing is defined for this Master Plan, see Section 4.0.) Through the development of the Master Plan, the City seeks to facilitate the provision of housing by the private sector that is affordable for both workers currently commuting from other parts of Miami-Dade County and the region as well as those who will work in Doral as the economy continues to grow and diversify. The Master Plan provides workforce housing implementation guidance and strategies based on the findings from an initial technical analysis (see Initial Assessment and Analysis Memo in **Appendix A**).

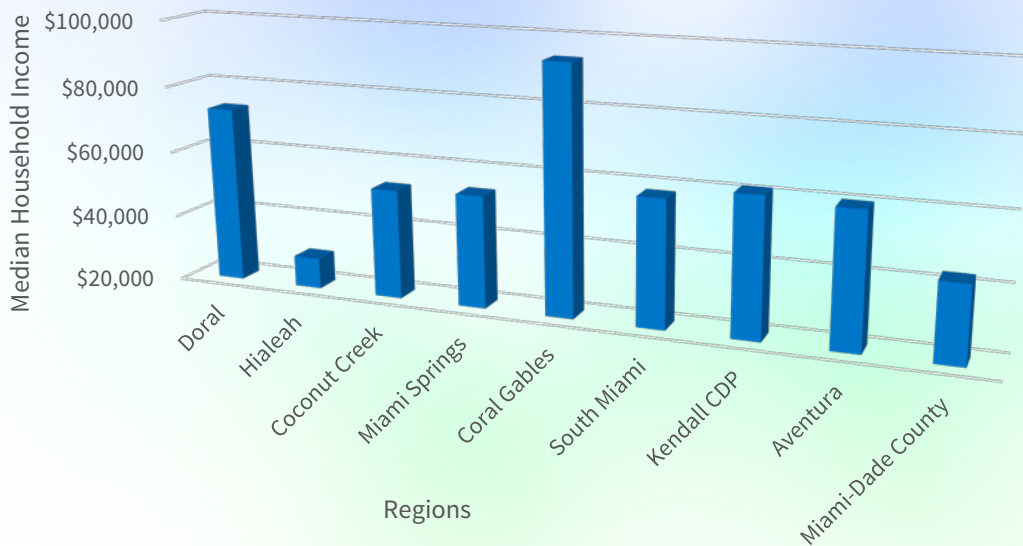
The remainder of this introduction provides background demographic, socioeconomic, and economic development information to contextualize the mismatch between place of work and place of residence for the vast majority of Doral's workers. Section 3.0 of this report makes the case for why the City has identified the provision of workforce housing as a response to this mismatch. Section 4.0 identifies the target worker population for workforce housing and the target workforce housing income range. Section 5.0 summarizes key findings from the technical and background data analysis on income and housing affordability and availability. Section 6.0 provides an analysis to show where workforce housing would be feasible and desirable in the city. Section 7.0 provides background information on workforce housing implementation strategies tailored to the unique context of Doral and the findings from the analysis of previous sections. Section 8.0 provides performance metrics to measure success of the workforce strategies. Section 9.0 provides preliminary guidance on management of a workforce housing program. Section 10.0 provides final recommendations for the City of Doral's Housing Master Plan.

2.1 BACKGROUND

Doral is a relatively new (incorporated in 2003) and affluent city of nearly 59,304 residents, based on 2016 estimates from BEBR. The city's median annual household income of \$72,933, based on 2015 ACS estimates, is greater than that of Miami-Dade County (\$43,129) and one of the highest in the region. **Figure 2-1** illustrates Doral's median annual household income in comparison to the county as a whole as well as several cities.



Figure 2-1: Median Household Income Regional Comparison



Source: 2015 ACS

The city has also experienced significant population growth, which is expected to continue in the coming years. The 2016 population estimate indicates an increase of 29.8% from the 2010 Census count of 45,704 and 6.5% from the 2015 BEBR estimate of 55,660. The City’s Comprehensive Plan anticipates a 2030 population of 103,421 residents, a nearly 74% increase in population over the 2016 estimate. This growth will continue to drive demand for new housing within the city (Figure 2-2).

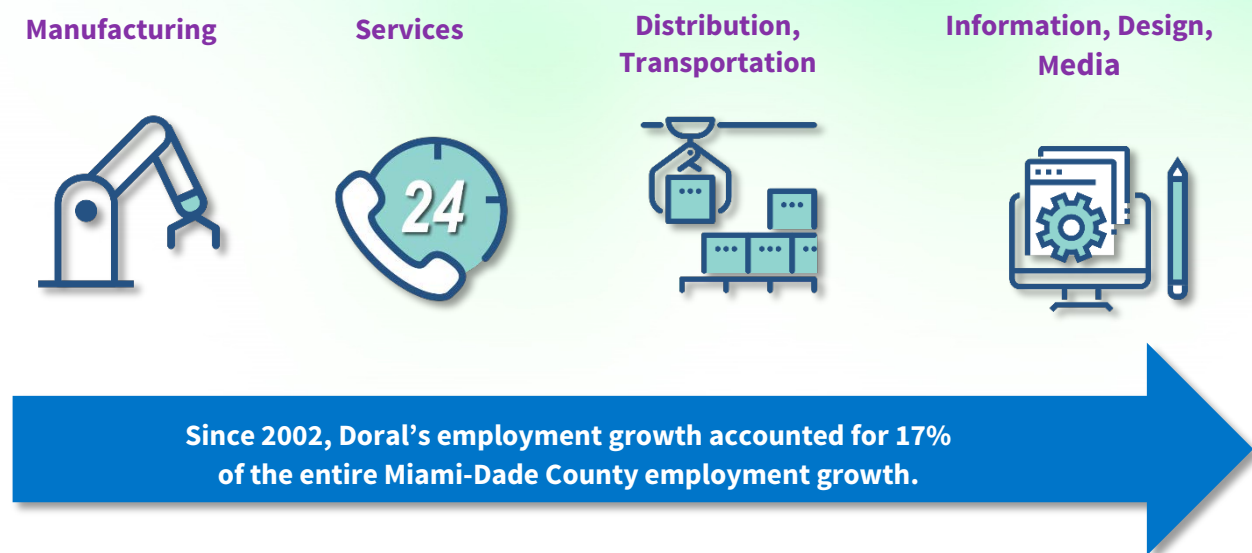
Figure 2-2: Future Population Growth



Sources: 2016 Bureau of Economic and Business Research population estimate; 2030 City of Doral Comprehensive Plan population projection

In addition to its affluence and growth, the city is characterized by its status as one of Miami-Dade County’s “most important and significant sub-economies,” according to the City of Doral Economic Analysis completed by the FIU Metropolitan Center.¹ For example, the analysis finds that the city’s employment growth since 2002 accounted for 17% of the entire county’s employment growth since that time (**Figure 2-3**). The analysis also notes that the city’s economy is globally interconnected and has a high proportion of firms and establishments in the Advanced Industry Sector, which “drives innovation, technology advances, and new service business models to expand and grow.”² The FIU analysis notes target sub-industries for future growth in the general sectors of manufacturing; services; distribution and transportation; and information, design, and media.

Figure 2-3: Miami-Dade County Employment Growth

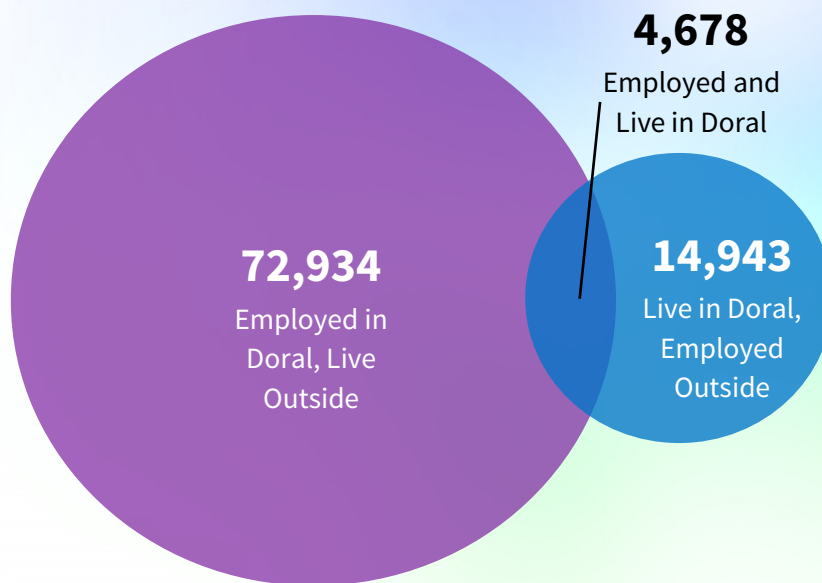


Despite these advantages, the report also highlights a mismatch between place of residence and place of work for the city’s residents and workers. **Nearly 76% of workers living in Doral work outside of the city, and nearly 94% of the jobs within the city are filled by workers who do not live there.** One effect of this is traffic problems, given that more than 72,000 workers enter the city and more than 14,000 residents leave the city to go to work on a daily basis.

These findings are similar to those from an analysis using the U.S. Census OnTheMap tool. The tool uses Longitudinal Employer-Household Dynamics (LEHD) data drawing from existing Census figures and combines them with Bureau of Labor Statistics employment and wage data. The inflow and outflow of all jobs in Doral show that the city attracts primarily outside workers, with 72,934 workers entering the city on a daily basis, as seen by the large purple circle in **Figure 2-4**. At the same time, fewer than 5,000 people live and work within the city, shown as the overlap in the two circles, and 14,943 leave the city to work elsewhere.



Figure 2-4: Doral Inflow/Outflow Job Counts in 2014



Source: US Census – OnTheMap

The problem of housing affordability, also highlighted by the FIU Metropolitan Center and the primary focus of this Master Plan, provides a different perspective on the same problem, as the high cost of housing in Doral makes it difficult for workers with relatively lower incomes to afford housing in the city. Recognizing this issue in 2016, the City of Doral adopted a Workforce Housing Density Bonus (WHDB) program that created development incentives that allow for increased development density in exchange for workforce units. The WHDB program defines workforce housing units as those for households with an annual income between 65% and 140% of the Area Median Income (AMI), as established by the U.S. Department of Housing and Urban Development (HUD). In accordance with City Ordinance 2017-07 (May 24, 2017), a moratorium was placed on the WHDB program to provide an opportunity to re-evaluate solutions in completing this Housing Master Plan.

2.2 KEY TAKEAWAYS FOR 2.0

- Doral’s population is expected to continue to grow through 2030. The City’s Comprehensive Plan anticipates a 2030 population of 103,421 residents, a nearly 74% increase in population over the 2016 BEBR estimate of 59,304. This growth will continue to create pressure for new housing, although nearly all of that growth will need to occur in the form of redevelopment due to the fact that there is little vacant land within the City limits.
- Doral is considered one of the most important and significant sub-economies in Miami-Dade County, with potential for future growth in sub-industries related to manufacturing; services; distribution and transportation; and information, design and media.



- According to 2015 ACS estimates, Doral’s median annual income is \$72,933, one of the highest in Miami-Dade County and nearly \$30,000 more than the Miami-Dade County’s median annual income of \$43,129.
- Doral is experiencing a severe jobs/housing mismatch—nearly 76% of workers living in Doral work outside of the city, and nearly 94% of the jobs within the city are filled by workers who do not live there. This mismatch in jobs and housing creates a situation that requires workers to commute into and out of the city, generating high levels of regional traffic.

SECTION 3 THE CASE FOR WORKFORCE HOUSING

The rationale behind the provision of workforce housing as one response to the mismatch described in the previous section is based on two key strategies—supporting economic development and building civic engagement and a stronger sense of community in Doral.

3.1 ECONOMIC DEVELOPMENT

As described in the previous section, Doral is already a major hub of economic development in Miami-Dade County. Providing workforce housing in the city can support this economic growth as part of a transition to a vibrant, more urbanized community that is attractive to both firms and residents (**Figure 3-1**). For instance, a report from the Center for Housing Policy cited findings presented in 2007 from a national survey by Harris Interactive of more than 300 companies that indicated that more than half of the largest companies believed they had insufficient affordable housing nearby, and **two-thirds of these companies believed this lack had a negative effect on retention of entry- and mid-level employees**.^{3, 4} The findings indicate that providing workforce housing is a way to help address the issue of employee retention to benefit businesses.

Figure 3-1: Apartments in Doral CityPlace



Source: *The Flats* - <https://apartmentscityplacedoral.com/photo-gallery/#bwg8/228>

Economic growth also can be a way to increase property values, which benefits residents who are homeowners as well as the City's fiscal health. Yet, a common concern is that adding subsidized housing to an area will act to lower property values, stigmatizing this type of housing. Several reports and studies that looked at this issue found that the effect of subsidized housing on property values depends on a variety of factors. Nguyen concluded in a 2005 article that affordable housing tends to have a neutral effect on property values if it is built in healthy, vibrant neighborhoods; the structure of the affordable housing does not change neighborhood quality or character; it is well managed; and it is dispersed.⁵ Well-designed affordable housing also minimizes the risk of property value declines. Nguyen adds that when property declines do occur, they are often of small magnitude.

Ellen also looked at factors influencing the effect of subsidized housing on property values in a 2007 paper⁶ and found that location matters in terms of what the housing is replacing, such as unattractive or underused sites, as well as neighborhood context, such as activity in surroundings and concentration of subsidized housing. The review also suggested that achieving a critical project mass through moderate-sized developments in several neighborhoods (as opposed to one large development) and localizing housing program administration (as opposed to federal) can have positive effects. Noted was that having a mix of tenant incomes may have some benefits, but tenant

composition does not matter as much as is typically thought. These findings indicate that if subsidized housing is done thoughtfully and accounts for certain considerations, the risk for lowered property values will be minimized. The City of Doral can play a major role in mitigating any potential negative effects through proactive planning, ensuring that any workforce housing is integrated in a way that minimizes impacts. For example, the City can continue and build on efforts already laid out in its current WHDB program to ensure that the quality and ratio of workforce units is comparable to that of market-rate units.

Aside from a concern about property values, current residents also may feel concern about additional traffic from new residential units. Given the population growth projected for the city, as discussed in the introduction of this report, and the economic development already occurring, the effects of any added local traffic from additional workforce housing units likely will be minimal in scale. This housing also is designed to reduce the regional commuter traffic by providing housing close to work, which could have a positive effect on traffic.

3.2 COMMUNITY

Figure 3-2: Intergenerational Community

Providing workforce housing also may help reinforce community identity by creating an opportunity for those who work in the city to remain as their needs grow and change. This can contribute to a stronger sense of place and community for those working in the city on a daily basis. This sense of community may not only affect current residents, but also younger generations in fostering a sense of connection to the city and creating an inter-generational community identity. Achieving these aims will require a diversity of housing types, including rental options with pathways to homeownership and costs to accommodate various household sizes, including families and workers just starting their careers (**Figure 3-2**).



3.3 KEY TAKEAWAYS FOR 3.0

- Findings presented in 2007 from a national survey conducted by Harris Interactive of more than 300 companies found that more than half of the largest companies believed they had insufficient affordable housing nearby, and two-thirds of these companies believed this lack had a negative effect on retention of entry- and mid-level employees. Given Doral's economic growth potential, providing appropriate housing for employees will be an important ingredient to success.



- Doral aims to spur economic development and foster an intergenerational sense of community by providing housing affordable to its workforce. Providing housing opportunities for a variety of demographics (young singles to retired families) will help in this effort.
- By accounting for certain factors in workforce housing implementation, such as neighborhood context, housing structure and design, housing management and administration, and geographic dispersion, the City of Doral can minimize risks of decreased property values.



SECTION 4 DEFINING WORKFORCE HOUSING

It is important to clearly define the term “workforce housing” as used in this Housing Master Plan in terms of the worker population of focus. Typical definitions, based on AMI, are modified for the Housing Master Plan to reflect income ranges that include **two target workforce populations—public workers and young professionals—in priority sub-industries for the city’s future economic growth.**

4.1 TYPICAL DEFINITIONS OF WORKFORCE HOUSING

Workforce housing often is defined based on a certain income range of the AMI. Using AMI helps standardize measures, as income limits for affordable units are (or have been) defined in terms of AMI by State housing legislation, such as the State Housing Initiatives Partnership (SHIP) and the Community Workforce Housing Innovation Pilot Program of 2006. The Community Workforce Housing Innovation Pilot Program defined workforce housing to apply to households with annual incomes not exceeding 140% or 150% of AMI depending on whether an area is of “critical state concern.” Doral’s existing WHDB aimed to serve households with incomes ranging from 65% to 140% of AMI.

4.2 WORKFORCE HOUSING DEFINITION FOR DORAL’S HOUSING MASTER PLAN

The focus worker populations for this Master Housing Plan are public workers who are essential personnel for helping the City run (e.g., police officers, firefighters, teachers, and other professional staff) and young professionals in the city’s target sub-industries, as noted in the FIU Metropolitan Center report. Based on salaries from relevant occupations and sub-industries and current housing affordability information, this Master Plan recommends extending the workforce housing range from 60% to 150% AMI. The full wage and household income analysis is provided in Section 5.0.

4.3 KEY TAKEAWAYS FOR 4.0

- The targeted workforce populations for the Housing Master Plan are public workers and professionals in key sub-industries for economic development.
- The proposed target workforce housing income range is 60–150% AMI.



SECTION 5 DORAL’S HOUSING SITUATION

This section first provides the background income and housing affordability and availability analysis that supports the recommendation of a workforce housing income range of 60–150% AMI. It then provides information on future population growth and approved development activity to show how general housing needs will increase in the future, the degree of current development activity in the city, and how those factors relate to the provision of workforce housing.

5.1 TARGET WORKFORCE AND FAMILY SALARIES

An analysis of salaries for the target workforce populations illustrates the degree to which the workforce income range captures individuals in the two focus worker populations discussed in Section 4.0. **Table 5.1** shows the percentage of minimum, mid-point, and maximum salaries, by occupation, for the City of Doral (including police) and Miami-Dade Fire Rescue and by experience level for Miami-Dade County schoolteachers that fall within the workforce housing range of \$31,080 to \$77,700. The table indicates that a majority of salaries fall within this range. Even in instances in which the maximum salary is paid, 100% of teachers in Miami-Dade County Schools fall in the workforce housing income range, regardless of experience level, and a sizable share of City and top five Miami-Dade Fire Rescue occupations (based on number of employees) fall in the workforce housing income range.

Table 5-1: Government Occupation Salaries and Workforce Housing Income Range

Agency/Salary Level	% of Salaries within WFH Income Range
City of Doral Occupations	
Minimum Salary	88%
Mid-Point Salary	79%
Maximum Salary	55%
Miami-Dade Fire Rescue: Top 5 Occupations by Number of Employees	
Minimum Salary	80%
Mid-Point Salary	60%
Maximum Salary	40%
Miami-Dade County Schools: Teachers with Various Levels of US Public School Experience	
Minimum Salary	100%
Mid-Point Salary	100%
Maximum Salary	100%
Miami-Dade County Schools: Teachers with Various Levels of Non-Public School Experience	
Minimum Salary	100%
Mid-Point Salary	100%
Maximum Salary	100%

Source: City of Doral, Miami-Dade County

The Master Plan also considers the workforce in industries that are important for Doral’s current and future economic growth. This Master Plan references salary information for the targeted sub-industries identified by the Florida International University Metropolitan Center.⁷ Estimated average annual wages for these sub-industries in Miami-Dade County were calculated using average weekly wage information from the Bureau of Labor Statistics. Of the 25 industries for which information was available, 18 (or 72%) of the target sub-industries had annual wage estimates falling in the proposed workforce income range (**Figure 5-1**).

Figure 5-1: Target Sub-Industry Average Annual and Workforce Housing Income Range

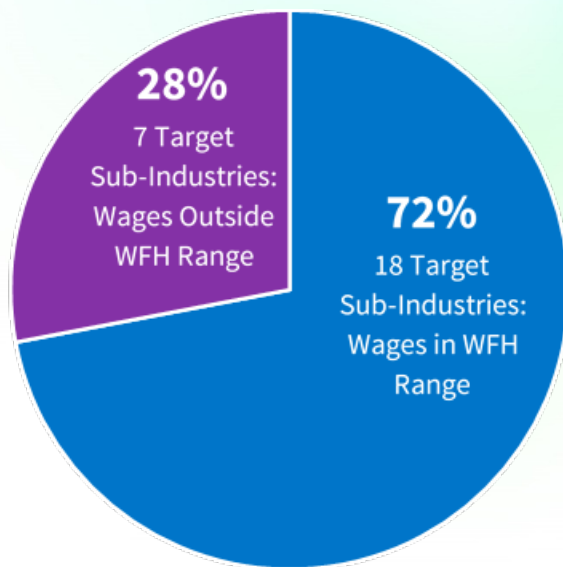


Table 5-2 shows these 18 sub-industries with associated wage estimate information. By this measure, the income range covers a sizable share of the industry salaries, yet it is important to note that each industry contains a number of occupations that may have a broader range of wages.

These findings indicate that the average salaries of individual workers fall into the workforce housing range. As a result, the range would capture workers in single-income households, some of whom may be starting their careers and looking to gain a foothold in the Doral housing market. **Note that workforce housing would be based on household income as opposed to that of individual workers, so the income from others residing in the same household would be accounted for.**



Table 5-2: Target Sub-Industry Average Annual Wage Estimates within Workforce Income Range

Sub-Industry (at 4-Digit NAICs Level)	Annual Wage Estimate Based on Average Weekly Wage
NAICS 3152 Cut and sew apparel manufacturing	\$36,244
NAICS 3341 Computer and peripheral equipment manufacturing	\$57,486
NAICS 3391 Medical equipment and supplies manufacturing	\$58,968
NAICS 4236 Appliance and electric goods merchant wholesalers	\$70,772
NAICS 4238 Machinery and supply merchant wholesalers	\$60,164
NAICS 4239 Miscellaneous durable goods merchant wholesalers	\$48,984
NAICS 4882 Support activities for rail transportation	\$36,296
NAICS 4885 Freight transportation arrangement	\$51,116
NAICS 5121 Motion picture and video industries	\$65,260
NAICS 5242 Insurance agencies and brokerages	\$67,288
NAICS 5413 Architectural and engineering services	\$72,020
NAICS 5414 Specialized design services	\$51,532
NAICS 5416 Management and technical consulting services	\$77,064
NAICS 5418 Advertising, public relations, and related services	\$71,136
NAICS 5615 Travel arrangement and reservation services	\$41,184
NAICS 6115 Technical and trade schools	\$48,100
NAICS 6117 Educational support services	\$75,712
NAICS 7115 Independent artists, writers, and performers	\$62,608

Note: These annual wage estimates are based on annual average weekly wages for 2016. For NAICS 3341 and NAICS 4882, 2017 annual average information was not available for Miami-Dade County, so an average weekly wage was calculated from the first and second quarters of 2017 and used as a basis for the annual wage estimates.

Source: 2016–2017 Quarterly Census of Employment and Wages, Bureau of Labor Statistics

It may be the case that Doral would attract more multi-earner households given the rise in family households (assuming those tend to have more than one earner). The FIU Metropolitan Center found that “the number of family households in the city has increased by 29.6 percent (2,897 families) since 2007, while non-family households have decreased by 17.6 percent (563 non-family households) (**Figure 5-2**). In comparison, Miami-Dade County experienced a less than 1 percent increase in family households during this time period and a 3.6 percent increase in non-family households.”⁸

Additionally, 2015 ACS data indicate that Doral has one of the highest persons per household ratios (3.42) in the county, which may indicate greater potential for having households with more than one earner. Although this may mean that some family and multi-earner households with workers in the focus populations may no longer qualify for workforce housing, the fact that they do not qualify is an indication that they have market-rate options available.

To account for family households in general, an analysis was conducted using Median Family Income (MFI) to determine which incomes by household size were captured by the proposed workforce income range.

Figure 5-2: Family vs. Non-Family Households in the City of Doral (Since 2007)

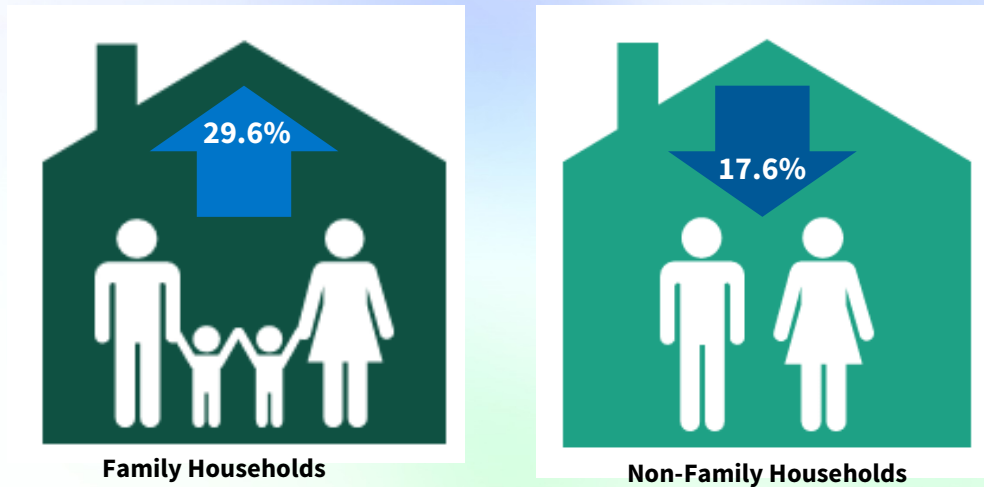


Table 5-3 shows the resulting incomes for different size households at various percentages of MFI for the Miami metropolitan area. Incomes for families earning MFI (100%) are captured by the proposed workforce range for households of one to four people. Given that estimates used for persons per household range from 2.5 used in City calculations to 3.42 based on 2015 ACS estimates, the proposed workforce range would likely capture the average size family making the median amount of household income, with some cushion on either side in case families are smaller or larger.

Table 5-3: Income by Percentage of Median Family Income and Persons per Household

MFI Level	Persons Per Household				
	1	2	3	4	5
60%	\$31,740	\$36,240	\$40,800	\$45,300	\$48,960
80%	\$42,320	\$48,350	\$54,400	\$60,400	\$65,250
100%	\$52,900	\$60,400	\$68,000	\$75,500	\$81,600
120%	\$63,480	\$72,480	\$81,600	\$90,600	\$97,920
140%	\$74,060	\$84,560	\$95,200	\$105,700	\$114,240

Note: Cells highlighted in purple indicate those incomes that fall in the proposed workforce housing range of \$31,080–\$77,700 at 100% MFI. Estimates for persons per household in Doral range from 2.5 to 3.42.

Source: U.S. Department of Housing and Urban Development, FY 2017 Income Limits

5.2 HOUSING AFFORDABILITY AND AVAILABILITY FOR HOUSEHOLDS

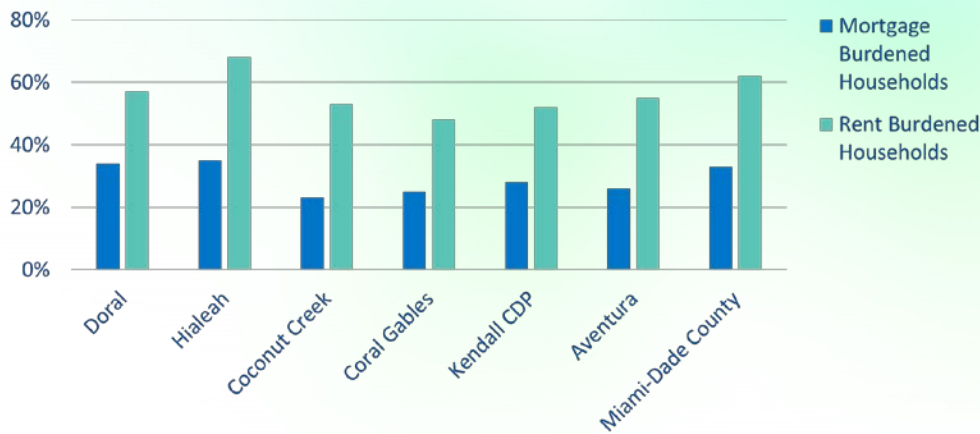
In addition to the analysis on income levels for the target workforce and families in Miami-Dade County, a second analysis was completed to understand affordability and housing availability related to the proposed income range.

A common measure of housing affordability in an area is housing burden, the percentage of household income spent on housing. A household is generally considered burdened if it spends more than 30% of its income on housing. By this measure, housing affordability is generally a problem in



Doral, as well as in the Miami-Dade area as a whole. The share of burdened households in Doral is high compared to other municipalities in the region (**Figure 5-3**). Doral's share of mortgage-burdened households is comparable to the county's, whereas its share of rent-burdened households is lower than the county's. **However, it is important to note the Miami metropolitan area has been ranked #1 among metro areas for the highest share of renter households that were rent-burdened (over 55%) and severely rent-burdened (over 30%) in 2015.**⁹ As a result, Miami-Dade County likely has a relatively high share of rent burden, indicating that Doral's share, while below the county's, is also fairly high.

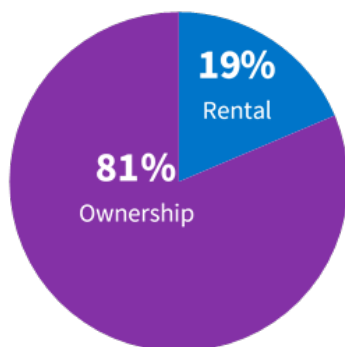
Figure 5-3: Burdened Households



Note: 30% or more of household income spent on housing = burdened.
Source: 2015 American Community Survey

Regarding the share of these two types of housing tenure (ownership and rental) in the city, rental apartments currently make up 18.6% of the total housing stock (**Figure 5-4**). The heightened burden of renters, therefore, is experienced by a smaller share of households in the city. However, the South Florida Community Land Trust Network notes that South Florida experienced the sixth highest decline in homeownership in the nation (6.5%) between 2006 and 2013.¹⁰ The Network relates this decline to the housing boom and bust, stricter lending standards, and generational choices.

Figure 5-4: Housing Tenure (Ownership vs. Rental)





The following analysis takes a closer look at what housing options are available, based on household incomes. **Table 5-4** shows the number of housing units (vacant and occupied) that could potentially be available for purchase by housing type for different income levels within the workforce housing income range. The number of units available at each income level is calculated based on how many units fall at or below an affordable price point (“Just Value Threshold”), which is estimated at 2.5 times a household’s annual income (note that the number of units available at each level is cumulative).

Table 5-4: AMI and Housing Cost- Based on Area Median Income

AMI	JV Threshold ¹	Income Range	Units Available			
			Single Family	Townhome	Condo	Total
\$31,080	\$77,700	60%	3	19	15	37
\$41,440	\$103,600	80%	5	19	79	103
\$51,800	\$129,500	100%	5	19	1,614	1,638
\$62,160	\$155,400	120%	5	19	2,603	2,627
\$72,520	\$181,300	140%	7	19	4,193	4,219
\$77,700	\$194,250	150%	10	19	5,133	5,162

¹ The Just Value Threshold was calculated by multiplying the Area Median Income (provided by HUD) by 2.5. The values then were able to be compared to the just values of properties within Doral to determine the quantity of properties available at different price points. A multiplier of 2.5 is a conservative general computation to determine affordability, used in studies such as the 2014 Broward County Housing Linkage Fee Nexus Study. For comparison, a multiplier estimate was calculated for Doral at 4.9, based on a typical family size, 60% median family income, a typical mortgage rate, and payments not exceeding 30% of income. This study relies on the more conservative estimate of 2.5.

² The analysis in this table and in later sections of this report rely on 2016 tax roll data from the Florida Department of Revenue. Although the data were reported in 2016, they are based on assessments from 2015.

Source: 2016 Florida Department of Revenue, 2015 ACS

The findings indicate that overall, the number of for-purchase units within the target range of affordability (5,162) is 28% of all for-purchase units in the city (18,763). There are very few single-family houses or townhomes available, regardless of income level; even at the maximum workforce income level, only 10 single-family units and 19 townhome units are available. The number of available condos, although not as low as the single-family and townhome types, is also very limited, particularly at the 60% and 80% AMI levels. This distinct difference in available units at the lowest and highest workforce income levels is seen overall as well. **When considering all housing types, there are more than 100 times more units available at the highest income level than at the lowest income level within the workforce housing range.**

To summarize, housing type choice is severely limited for workers with incomes in the workforce housing range, and the available number of units in general for those in the lower income brackets is very low. Note that these numbers represent units that are both occupied and unoccupied, so the number of units actively available for occupancy is even lower.

A consideration of unit size also suggests that housing in the workforce range is unavailable. **Table 5-5** provides a just value per square foot for each housing type based on just values for units built in



2010 or later. Using this as a rough estimate proxy of cost to construct a new unit, the table shows a corresponding size of unit that would remain affordable at income levels within the target workforce range. The findings indicate that regardless of housing type, it is only at the higher end of the income range that units start to attain a typical size. Moreover, **Table 5-6** shows that the median size of units built since the 1960s has been greater than 1,000 square feet for all three of these housing types, although the condos built have been notably closer in size to estimated affordable sizes than the other housing types. This finding suggests that the units being built in the city generally are not affordable, but condos (or other multi-family development such as rental apartments) might be easier to incentivize for the provision of workforce units than the other housing types.

Table 5-5: New Unit Sizes Affordable in Workforce Income Range

Income Level (% AMI)	Affordable Unit Square Footage		
	Single Family (\$194.44/sq. ft.)	Townhome (\$213.56/sq. ft.)	Condo (\$195.96/sq. ft.)
60%	400	364	397
80%	533	485	529
100%	666	606	661
120%	799	728	793
140%	932	849	925
150%	999	910	991

Source: 2016 Florida Department of Revenue

Table 5-6: Median Size of Housing Units

Year Built	Single-Family (sq.ft.)	Townhouse (sq.ft.)	Condominium (sq.ft.)
Pre 1960	1,550	-	-
1960s	2,021	-	-
1970s	2,140	-	1,060
1980s	1,936	1,809	1,036
1990s	2,403	1,888	1,120
2000s	2,424	1,888	1,303
2010s	2,897	2,001	1,256

Source: 2016 Florida Department of Revenue

The fact that new units must remain very small to maintain affordability for even those at the 150% AMI income level without any subsidies poses a challenge, given the possibility of Doral attracting family households, as discussed previously in this section. Consequently, it will be necessary to include larger new units to accommodate any families and larger household sizes, and subsidized options will need to be available for families and large households who qualify. This likely can be accomplished through provisions such as those in the current WHDB program that require the unit size mix of workforce units to match that of the market-rate unit mix in a mixed-income development. In this way, the market can help determine how many of each size unit to provide.

An analysis of rental apartment units suggests a lack of affordability for this housing type as well.

Table 5-7 shows the affordability threshold for monthly rent payments at different income levels



within the workforce income range (based on an affordability definition of spending 30% or less of household income on housing). **Table 5-8** shows median and average rental rates in Doral based on a review of apartment complexes in Doral in 2017. The number of units accounted for in this review accounts for roughly 82% of the rental stock in the city (based on the Florida Department of Revenue 2016 total number of apartment units). A comparison of the tables shows that the only units affordable at the median and average prices are one-bedroom apartments, and they are affordable only to those in the top income brackets of the workforce income range.

Table 5-7: Affordability Thresholds for Rental Units

AMI	Multi-Family Rental Monthly Payment Threshold	Income Range
\$31,080	\$777	60%
\$41,440	\$1,036	80%
\$51,800	\$1,295	100%
\$62,160	\$1,554	120%
\$72,520	\$1,813	140%
\$77,700	\$1,943	150%

Note: Thresholds are calculated using an affordability assumption of a maximum of 30% of income spent on rent.

Source: 2016 Florida Department of Revenue

Table 5-8: Mean and Median Apartment Rents by Unit Type

	1 Bedroom	2 Bedroom	3 Bedroom
Median	\$1,755	\$2,160	\$2,352
Mean	\$1,802	\$2,168	\$2,597

Source: 2017 apartment rents acquired online via Google search

5.3 GENERAL GROWTH AND DEVELOPMENT CONSIDERATIONS

Although the previous analysis shows a current housing need identified for the workforce housing range, it is important to look at future conditions to account for future growth that will require additional housing but that also provide the need for market-rate residential development to which the City can apply workforce housing requirements. (See Section 7.0 for workforce housing strategies that are linked to market-rate development.)

As mentioned in the introduction, Doral’s population is expected to grow nearly 74% from its estimated 2016 population of 59,304 to an estimated 103,421 by 2030. Consequently, the net increase in residents is an estimated 44,117.

In recent years, the City has approved thousands of new residential units that are expected to be built in the near future. **Table 5-9** and **Figure 5-5** show the estimated units for projects in various stages of the development process that are expected to be built from 2017 through 2020, with corresponding estimated population to be housed in these units. The total estimated population housed in these

units (24,073) makes up nearly 55% of the projected population increase through 2030 (**Figure 5-6**). **Map 5-1** indicates the locations of the developments. These findings illustrate that Doral has a sizable amount of development slated to be built which has the potential to provide housing for roughly half of the projected population growth through 2030.

Table 5-9: Projection of New Units 2017-2021

Year	Estimated Population	Estimated Units
2017	163	65
2018	2,293	917
2019	1,688	675
2020	19,930	7,972
Total	24,073	9,629

Source: City of Doral

Figure 5-5: New Residential Units 2017-2021



Source: City of Doral

Figure 5-6: Projected Population Based on New Residential Units



Source: City of Doral



Additionally, more development likely will be needed to house the remaining projected population growth that will not be served by the currently-approved developments and any existing capacity. However, the current building wave and number of approved units potentially could reduce demand in the near future for new residential development that would be subject to workforce housing requirements. This possibility increases the importance in finding the right requirements/incentives to encourage new developers and development types to ensure that the target population has housing available.

5.4 KEY TAKEAWAYS FOR 5.0

- The majority of base salaries for Doral occupations, Miami-Dade Fire Rescue occupations (those with the most employees), and teachers of various experience levels fall in the workforce housing income range (88%, 80%, and 100%, respectively). The workforce income range thus captures salaries of public workers who are in single-income households making the minimum salary, which likely includes workers just starting out in their careers.
- In total, 72% of average annual wage estimates for sub-industries targeted for economic development in the recently completed FIU Metropolitan Center report fall in the workforce housing range. Again, the range likely would capture a sizable number of workers in these sub-industries living in single-income households.
- The proposed workforce income range includes adjustments for median family income (MFI) that roughly helps account for varying household sizes based on families.
- The 2015 ACS estimates that 34% of mortgage paying households are cost-burdened (paying more than 30% of income on housing) and that 57% of rental households are cost-burdened. These percentages are fairly consistent with those for Miami-Dade County as a whole, although the county's percentage of rent-burdened households is approximately 62%. Considering that the Miami metro area was rated the most rent-burdened metro area in the US in 2015 by the NYU Furman Center, these levels of rent burden are particularly high.
- When considering all housing types, there are more than 100 times more units available at the highest income level than at the lowest income level within the workforce housing range; in absolute terms, the number of units available for those making incomes in the proposed workforce range is low. These findings signal a strong need for more units within the workforce housing range.
- Compared to other housing types, there is a greater number of condos valued at an affordable price for those in the proposed workforce range (although the number is still low in an absolute sense). Additionally, the size of condo units that have been built is closer to estimated affordable unit sizes when compared to the other housing types. This finding suggests that these types of units might be easier to subsidize to achieve more workforce housing when compared to other owner-occupied unit types.



- Focusing on multi-family housing may facilitate the provision of workforce housing, and focusing particularly on rental in the near-term will allow for the timely provision of units. Yet it is important that in focusing on this housing type, the City still ensures housing that can accommodate the variety of qualifying household sizes. This can likely be accomplished through provisions such as those in the current WFHDB program that require the unit size mix of workforce units to match that of the market-rate unit mix in a mixed-income development. In this way, the market can help determine how many of each size unit to provide.
- There are currently 9,629 units planned/approved to be built through the year 2021 in Doral. The City estimates that this will house 24,073 new residents, which is nearly 55% of the projected population increase through 2030. The City should evaluate any opportunities to include workforce housing in currently approved developments, such as when they seek project modifications.



SECTION 6 LOCATION ANALYSIS

In addition to the considerations laid out in Section 5.0, the City will need to identify locations where it is feasible and desirable to locate workforce housing. This section provides a preliminary analysis of certain factors, including protection of existing single-family home areas, available and affordable land for workforce housing, and brownfield remediation to create focus areas where workforce housing could be incentivized.

The City faces a significant challenge in attempting to identify land appropriate for new workforce housing. As shown in the Existing Land Use Analysis of the Initial Assessment and Analysis Memo (see **Appendix A**), **the city is largely built out (data from the City's Comprehensive Plan indicates that, as of 2015, only 4.5% of land is vacant), and many of the areas that are designated residential but not yet built have new projects planned/approved that do not include designated workforce housing units.** Additionally, there has been some concern voiced by residents of existing neighborhoods about the potential impacts of increasing density of existing residential areas. In the near-term, the City needs to consider these challenges in identifying areas for workforce housing within City limits. The City also should consider strategies in the long term that provide a workforce housing approach to areas that may be annexed in the future.

As a result of the challenges described above, near-term workforce housing approaches should focus on areas outside of current residential areas (particularly single-family areas) where more affordable land may be available for development and/or where increased density will not affect existing neighborhoods. The target areas include those that have redevelopment potential, and where the City potentially could use incentives to encourage the development of workforce housing. Based on discussions with stakeholders and staff, three primary areas are targeted for workforce housing—major commercial corridors, the city's designated brownfield area, and other areas already targeted for redevelopment. The remainder of this section includes a cursory assessment of each of these areas and recommendations on how to encourage workforce housing development within them. For the examination of commercial corridors, Doral Boulevard (NW 36th Street and NW 41st Street) was chosen as an example. Although other corridors were identified as potential candidates during meetings with stakeholders and staff, Doral Boulevard was chosen as the example due to the variety of uses already present there (including residential) and its location and access. Part of the Doral Design District Core also was included in the study area as an area targeted for redevelopment.

6.1 PROPERTY SEARCH METHODOLOGY

Since most of the areas being assessed are currently developed, a search methodology was employed to identify potential target properties that may have the potential for future workforce housing. The methodology described below was used for both the corridor and the brownfield area.

1. **Identify the target area** – For the corridor, all properties located within 500 feet of the right-of-way were chosen. For the brownfield area, the approved boundary was used. The Doral



Design District Core lying within 500 feet of the NW 79th Avenue corridor and south to 33rd Street was included in the analysis.

2. **Remove residential properties** – Properties identified as residential within the existing land use data were removed based on the assumed goal of increasing residential uses, as opposed to replacing them, by converting non-residential uses.
3. **Remove golf courses** – This affected primarily the corridor study area where multiple golf courses abut the right-of-way. These properties were removed.
4. **Remove standing water** – Parcels that contain standing water (primarily stormwater/drainage features) were removed.
5. **Remove properties under 20 years old** – All properties with improvements (buildings) built after 1996 were removed, as newer developments are less likely to be redeveloped due to the cost of newer buildings/improvements.

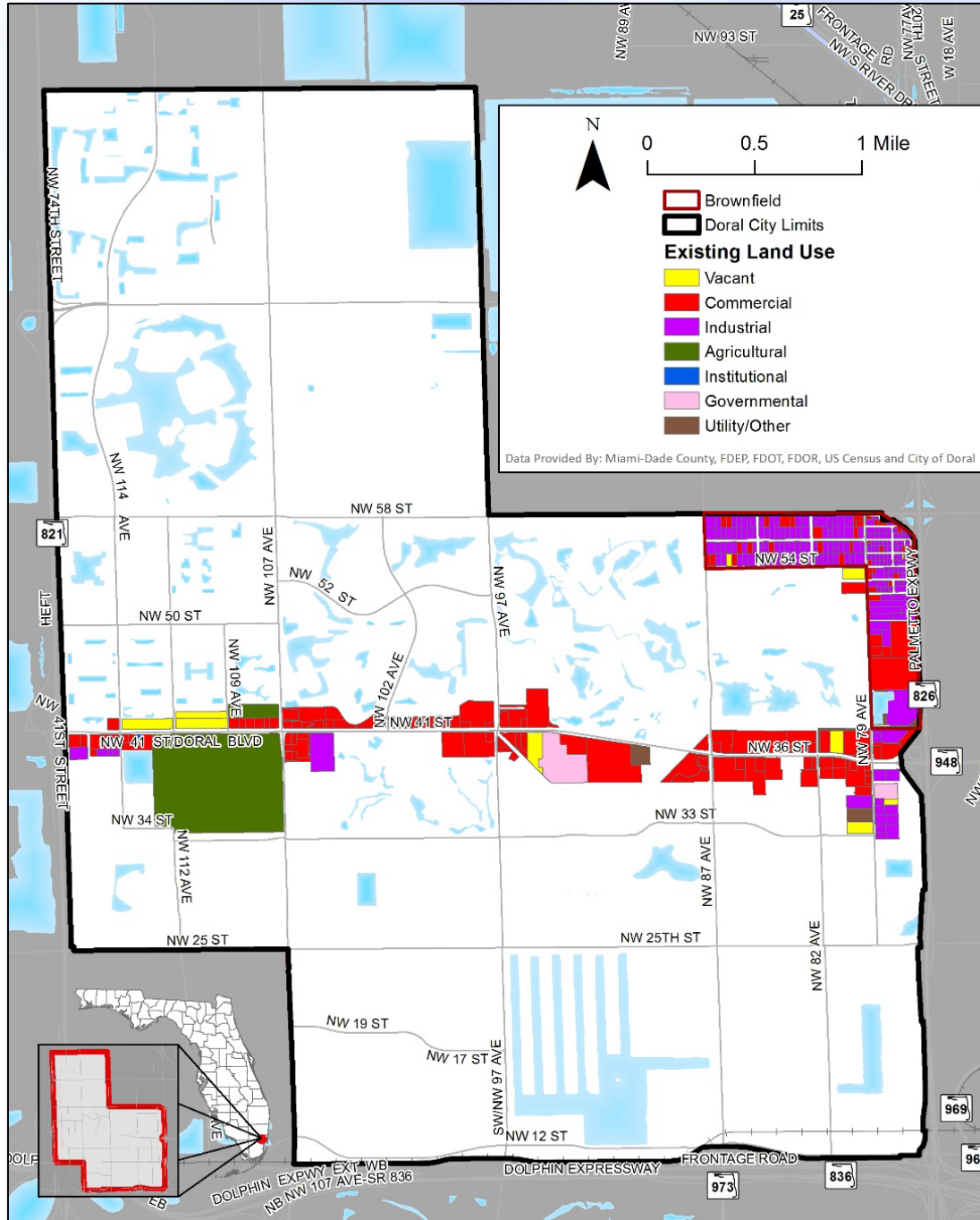
Using this search methodology, potential property targets were identified for both the corridor and brownfield areas. Combined maps for the two target areas are included below. In addition to existing land use and future land use maps, an improvement value/land value map is included that identifies parcels where the value of land is worth more than the existing improvements (buildings, etc.). Properties where this condition exists are more likely to contain older/deteriorated buildings and thus are more likely to be attractive for potential redevelopment.

6.2 EXISTING LAND USE AND ZONING

The existing land uses identified within the combined target areas are shown in **Map 6-1**.



Map 6-1: Target Areas – Existing Land Uses



Note: For the purposes of this analysis, agricultural land that did not have structural improvements was considered vacant.

Source: Miami-Dade County, FDEP, FDOT, FDOR, US Census, and City of Doral



Table 6-1 summarizes the existing land uses on the selected parcels along Doral Boulevard. The primary existing land use is agricultural, with 185.40 acres (43% of total), most of which (approximately 176 acres) is contained within the Lemon Property located at the southwest corner of the intersection of Doral Boulevard and NW 107th Avenue. The second most prevalent land use is commercial, which is spread along the corridor, and consists mainly of older shopping centers that may be attractive for redevelopment. Approximately 31 acres of vacant property are located along the corridor, which may provide opportunities for new development.

Table 6-1: Doral Boulevard Study Area Existing Land Use

Doral Blvd Study Area	
Existing Land Use	Acreage
Vacant ¹	30.74
Commercial	159.44
Industrial	19.04
Agricultural	185.40
Governmental	24.11
Utility/Other	10.92
Total	429.65

¹For the purposes of this analysis, agricultural land that did not have structural improvements was considered vacant.

²Note that 2017 Florida Department of Revenue data were reported in 2017 and based on assessments from 2016.

Source: 2017 Florida Department of Revenue

Table 6-2 summarizes the existing land uses on the selected parcels within the brownfield area. The primary land use is industrial with 146.80 acres (73% of total). The second most prevalent land use is commercial, which is spread through the study area and consists of a variety of uses including a trampoline park, indoor soccer fields, and automotive parts retailers to name a few.

Table 6-2: Brownfield Study Area Existing Land Use

Brownfield Study Area	
Existing Land Use	Acreage
Vacant	4.45
Commercial	42.64
Industrial	146.80
Utility/Other	8.46
Total	202.34

Source: 2017 Florida Department of Revenue

Table 6-3 summarizes existing land uses on the selected parcels in the Doral Design District Core study area. A majority of this land (53%) is industrial.



Table 6-3: Doral Design District Core Study Area Existing Land Use

Doral Design District Core Study Area	
Existing Land Use	Acreage
Vacant	4.12
Commercial	2.05
Industrial	17.65
Governmental	4.91
Utility/Other	4.76
Total	33.50

Source: 2017 Florida Department of Revenue

Map 6-2 shows the current zoning for the combined target areas. Much of the target areas is commercial, industrial, or commercial industrial. In the Doral Boulevard study area, the zoning categories with the highest acreage are General Use, with 175.87 acres (41% of the total), Industrial Commercial, with 116.45 acres (27% of the total), and Corridor Commercial, with 73.83 acres (17% of the total), as shown in **Table 6-4**. The zoning category with the highest acreage in the brownfield and Doral Design District Core areas is Industrial, with 170.14 acres (84% of the total) and 31.5 acres (94% of the total), respectively, as shown in **Tables 6-5** and **6-6**.

Table 6-4: Doral Boulevard Study Area Current Zoning

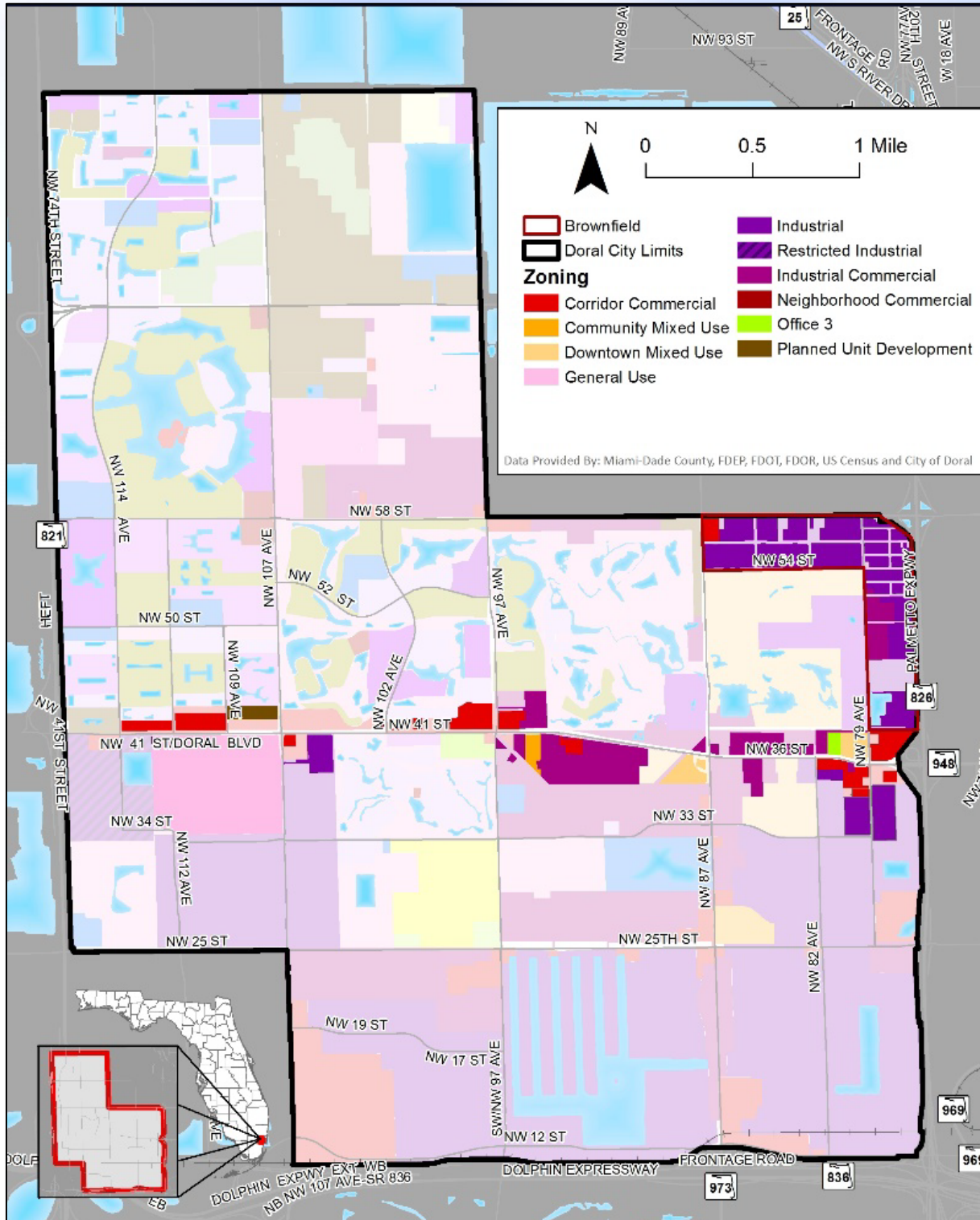
Doral Blvd Study Area	
Current Zoning	Acreage
Corridor Commercial	73.83
Community Mixed Use	6.94
Downtown Mixed Use	21.96
General Use	175.87
Industrial	18.02
Restricted Industrial	0.03
Industrial Commercial	116.45
Neighborhood Commercial	1.17
Office 3	4.20
Planned Unit Development	9.53
Total	428.01¹

¹ It is noted by the City that the Zoning and Future Land Use total acreage do not match due to GIS inconsistencies

Source: City of Doral



Map 6-2: Target Areas - Current Zoning



Source: Miami-Dade County, FDEP, FDOT, FDOR, US Census, and City of Doral



Table 6-5: Brownfield Study Area Current Zoning

Brownfield Study Area	
Current Zoning	Acreage
Corridor Commercial	5.17
Downtown Mixed Use	7.00
Industrial	170.14
Industrial Commercial	19.73
Total	202.04

Source: City of Doral

Table 6-6: Doral Design District Core Study Area Current Zoning

Doral Design District Core Study Area	
Zoning	Acreage
Corridor Commercial	2.1
Industrial	31.5
Total	33.5

Source: City of Doral

6.3 FUTURE LAND USE

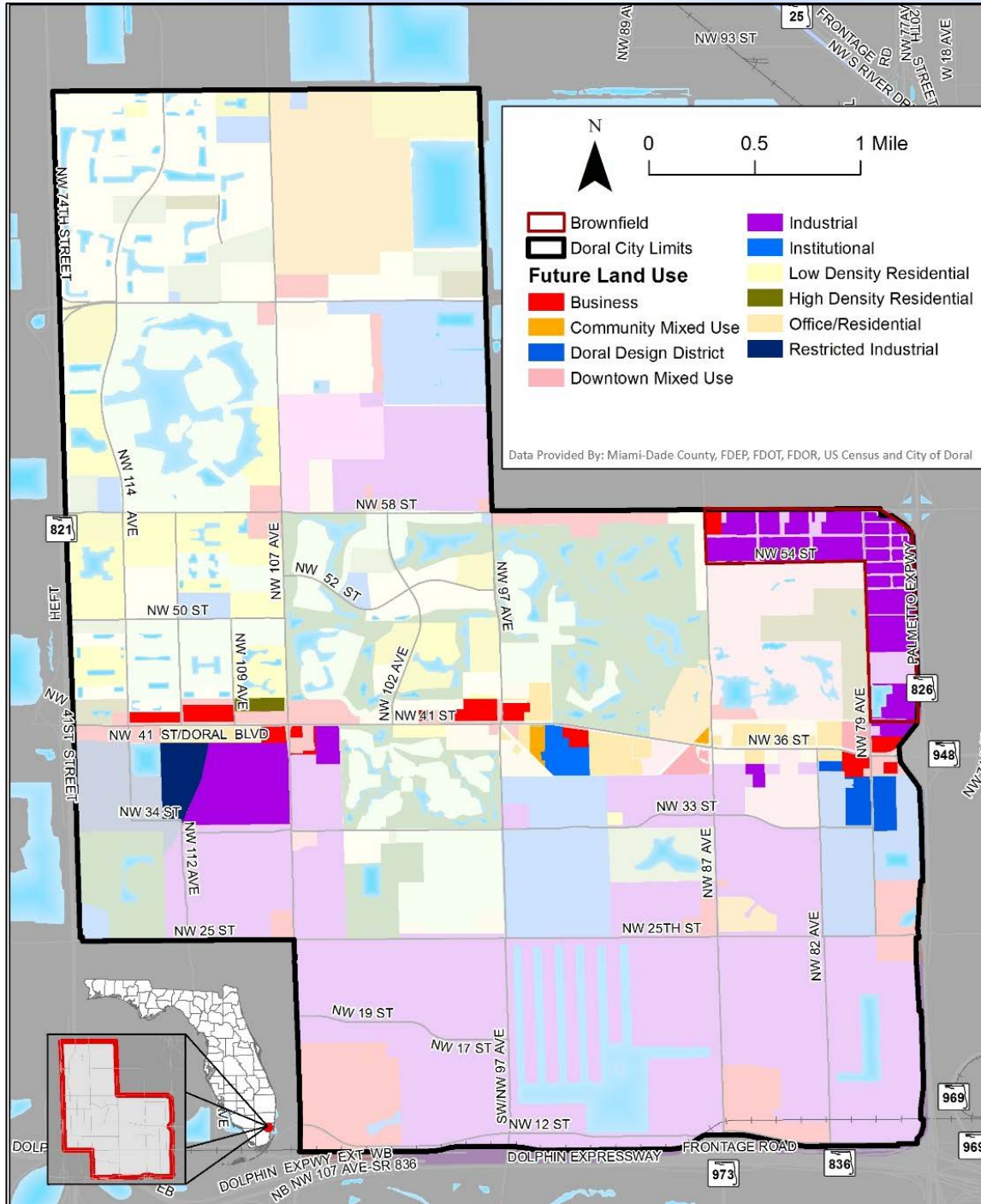
The future land uses within the combined target areas are shown in **Map 6-3**.

Table 6-7 summarizes the future land use designations on the selected parcels along Doral Boulevard. The most prevalent future land use category is Industrial, with 131.73 acres (31% of identified parcels); Office/Residential is the second most common designation, with 115.13 acres. The Lemon Property is split between two future land use categories, Industrial and Restricted Industrial.

Of the future land use categories present along the corridor, several allow for residential development to occur. **Table 6-7** includes a summary of maximum allowable residential density. In addition to the maximum allowable density, the Downtown Mixed Use and Community Mixed Use categories allow for a workforce housing bonus, which could yield up to 30% additional units if 2/3 of the approved bonus units are set aside for workforce housing. Those categories that allow for this bonus are noted with an asterisk (*).



Map 6-3: Target Areas – Future Land Use



Source: Miami-Dade County, FDEP, FDOT, FDOR, US Census, and City of Doral



Table 6-7: Doral Blvd. Study Area Future Land Use

Doral Boulevard Area		
Future Land Use Category	Acreage	Allowable Residential Density
Business	70.78	N/A
Community Mixed Use	8.73	19-25 du/acre*
Doral Design District	4.13	20 du/acre ¹
Downtown Mixed Use	22.80	25-35 du/acre*
High Density Residential	9.43	25 du/acre
Industrial	131.73	N/A
Institutional	24.12	N/A
Low Density Residential	2.11	10 du/acre
Office/Residential	115.13	16 du/acre
Restricted Industrial	40.17	N/A
Total	429.14	N/A

¹There is a District-wide maximum of five units per gross acre for all parcels in the Doral Design District Core combined.

Source: City of Doral

Table 6-8 summarizes the future land use designations on the selected parcels in the Brownfield Study Area. The most prevalent future land use category is Industrial, with 190.18 acres (94% of identified parcels). Of the allowed uses, only the Downtown Mixed Use designation, which makes up 7 acres of the area (3%), allows for residential.

Table 6-8: Brownfield Study Area Future Land Use

Brownfield Area	
Future Land Use	Brownfield
Business	5.17
Downtown Mixed Use	7.00
Industrial	190.18
Total	202.34

Source: City of Doral

The Doral Design District Core has its own future land use category. As noted above, there is a District-wide maximum of 5 residential units per gross acre for all Core District parcels combined, as well as a maximum of 20 units per acre for any one single parcel.

6.4 IMPROVEMENT TO LAND VALUE

Improvements to land value ratios for properties within the target areas are shown in **Map 6-4**. Generally, parcels with ratios under 1.00 are typically more attractive to redevelopment.



Table 6-9: Doral Blvd. Study Area Property Value Characteristics

Doral Boulevard Area Property Value Characteristics		Citywide Property Value Characteristics
Parcel Count	69	1,465
Median Acres per Parcel	1.86	1.10
Median Improvement Value to Land Value ¹	0.39	0.63
Median Land Value per Acre	\$1,168,936	\$1,071,667

¹ The “Lemon” property south of NW 41 St and west of NW 107 Ave was verified as vacant and was assumed to have an improvement value of zero.

Source: 2017 Florida Department of Revenue

Table 6-10 summarizes property value characteristics for the brownfield area. As shown, property parcels are small within the brownfield area, with a median size of 0.67 acres. The median improvement to land value ratio is somewhat higher than that found on Doral Boulevard, which likely reflects a mix of the age, use, condition, and the fact that because the parcels are smaller, the existing buildings occupy most of the site.

Table 6-10: Brownfield Study Area Property Value Characteristics

Brownfield Area Property Value Characteristics		Citywide Property Value Characteristics
Parcel Count	217	1,465
Median Acres per Parcel	0.67	1.10
Median Improvement Value to Land Value	0.54	0.63
Median Land Value per Acre	\$1,196,894	\$1,071,667

Source: 2017 Florida Department of Revenue

Table 6-11 summarizes property value characteristics for the Doral Design District Core area. The table indicates that the median parcel size is under 2 acres, yet still large compared to the citywide median. The median improvement value is relatively lower, making this area more desirable for redevelopment.

Table 6-11: Doral Design District Core Study Area Property Value Characteristics

Doral Design District Core Area Property Value Characteristics		Citywide Property Value Characteristics	
Parcel Count	14		1,465
Median Acres per Parcel	1.74		1.10
Median Improvement Value to Land Value	0.38		0.63
Median Land Value per Acre	\$1,126,977		\$1,071,667

Source: 2017 Florida Department of Revenue



6.5 KEY TAKEAWAYS FOR 6.0

- **General Takeaways**

- The City will protect existing single-family neighborhoods by minimizing new multi-family housing and additional density abutting those neighborhoods.
- The limited amount of vacant land available for development (4.5%) emphasizes the need to focus on denser multi-family units in the provision of workforce housing, as well as the need to look at opportunities along corridors where more density can be added, redevelopment opportunities, and use of the brownfield area in the city.
- The City can use its land use and zoning authority and its ability to provide additional incentives and target programs to facilitate workforce housing in identified areas of opportunity, which may be based on areas identified in the preliminary location analysis completed in this section.

- **Doral Boulevard**

- **Lemon Property** – This site offers a significant opportunity to pursue the development of a major mixed-use community that will contain workforce housing. Although the current future land use categories on the site do not allow residential development, the site is largely vacant and is surrounded by significant commercial and residential development.
- **Property Size** – Several selected properties along the corridor are currently large enough to provide enough space for an urban footprint multi-family development, with some structured parking.
- **Corridor Location** – The central location of Doral Boulevard and its mix of uses provide a good environment for the development of more multi-family residential development, including workforce housing.
- **Future Land Use** – Several sites along the corridor already have future land use designations that allow for residential development. Having the needed future land use category can greatly reduce the development timeline.
- **Access to Transit** – Doral Boulevard has good access to Miami-Dade Transit and, perhaps more important, the city's circulator bus system, which has the potential to connect new residential developments to places of employment.
- **Improvement Value/Land Value Ratio** – Many parcels have a ratio less than 1, indicating they are desirable for development.

- **Brownfield Area**

- **Clean-up Requirements** – To determine viability as an area for future residential development, the brownfield area will need to be assessed and potentially cleared of hazardous materials before development, so brownfield remediation is a consideration. The Florida Brownfields Redevelopment Program, administered locally by Miami-Dade County, allows for Brownfield Site Rehabilitation Agreements (BSRAs) with accompanying



- eligibility for benefits and cleanup incentives. Miami-Dade County’s website highlights some of the program benefits, including the State-sponsored Voluntary Cleanup Tax Credit (VCTC), “... cleanup liability protection for lenders and developers, application of Risk-Based Corrective Action principles to site rehabilitation ... and a streamlined and expedited development, permitting and technical review process.” According to the Miami-Dade County Brownfields Program 2017 Annual Report, the county had more than 30 sites with executed BSRAs.
- **Property Sizes** – Current parcel sizes within the brownfield are generally too small to allow for any significant new redevelopment without property aggregation. The City may seek to develop incentives to encourage property aggregation in these areas.
 - **Land Use/Zoning** – The current future land use category and zoning district within the brownfield area do not allow for residential development. The City should consider developing a master plan for the area that identifies the desired land use mix and appropriate categories to ensure that residential is part of the future mix of uses.
 - **Location** – The brownfield area is located immediately adjacent to Downtown Doral, which provides a major opportunity to create an urban neighborhood connected to all the amenities that Downtown has to offer.
 - **Improvement Value/Land Value Ratio** – Many parcels have a ratio less than 1, indicating they are desirable for development.
 - **Doral Design District Core Area**
 - **Property Size** – The median parcel size within the Doral Design District Core is small for significant development. However, some of the larger parcels may be of suitable size, and the City can incentivize property aggregation for smaller parcels.
 - **Future Land Use** – Residential uses are currently allowed, which will help facilitate the development of housing.
 - **Location** – The Doral Design District Core is near to the Doral Boulevard corridor, providing good transportation access; Downtown Doral is also fairly accessible from the District.
 - **Improvement Value/Land Value Ratio** – Generally, parcels have a ratio less than 1, indicating they are desirable for development.
 - **Master Plan** – The District has a Master Plan in place with further guidance on the development of the area that will need to be consulted when redeveloping.



SECTION 7 WORKFORCE HOUSING STRATEGIES

The following section summarizes implementation considerations based on findings from sections 5.0 and 6.0 that have informed the workforce housing strategies considered for Doral's unique situation.

The strategies reviewed in this section include:

- Inclusionary zoning and in-lieu fee
- Density bonus
- Other incentives
- Linkage fee
- Affordable homeownership programs
- Community land trust

7.1 IMPLEMENTATION CONSIDERATIONS

The following implementation considerations for workforce housing have been concluded from the analyses from sections 5.0 and 6.0:

- The Housing Master Plan should focus on the provision of multi-family rentals (townhomes, apartments, etc.).
- The City will protect existing single-family home neighborhoods by not allowing multi-family units or additional density.
- The City should target workforce housing towards particular opportunity areas, which might be based on areas identified through the preliminary location analysis of Section 6.0. These areas include land along corridors, such as Doral Boulevard, and other areas for redevelopment, such as the brownfield area in the city and the Doral Design District Core area.

7.2 INCLUSIONARY ZONING AND IN-LIEU FEES

Inclusionary zoning requires or encourages a certain percentage of units in a new residential development to be affordable. Often, there is an option to pay an in-lieu fee to an affordable housing fund as an alternative to providing the affordable units. A 2017 paper by Thaden and Wang identified 886 jurisdictions nationwide with inclusionary housing programs.¹¹ Based on information gathered from 273 of those programs, the authors found that the most common program type was mandatory.

Tindale Oliver conducted a more local review of affordable housing impact fee discounts and other regulations and incentive strategies implemented by jurisdictions in Florida.¹² The findings indicated that mandated inclusionary zoning with an in-lieu and/or linkage fee has been a relatively effective strategy for generating affordable units and revenue for affordable housing.

One jurisdiction that mandated inclusionary zoning with indications of success was Palm Beach County. The County's in-lieu fee is currently set at \$81,500 per owner-occupied workforce unit and



\$50,000 per rental workforce unit. (See the Initial Assessment and Analysis Memo in **Appendix A** for more information.) Pompano Beach has an in-lieu fee of \$2,333 per market-rate unit. Note that the Palm Beach County fee is applied per workforce unit, whereas that of Pompano Beach is applied per market-rate unit. Broward County requires a 15% set-aside or a fee in-lieu of in the amount of \$1 per residential gross square foot when City housing profiles and affordable housing programs are not in compliance with the land use policy. For Miami-Dade County’s Voluntary Workforce Housing Development Program, the in-lieu fee is the countywide median sales price in the Urban Development Boundary less the affordable purchase price for a family of four at 60% MFI for the county (or 140% of MFI for a county in a Minor Statistical Area). For developments of under 20 units, the fee is multiplied by the number of market rate units and divided by 20; for other development, it is multiplied by the number of workforce units. A fee passed in Doral may be higher than these fees given how expensive its housing market is.

The Tindale Oliver review found that in-lieu fees that supplement an inclusionary zoning program generate revenues that are more in line with the cost of providing housing. Linkage fees also can be used in conjunction with inclusionary zoning and are applied to non-residential development as a form of impact fee; since they are governed by impact fee requirements, the funds generated may be less than the actual cost of providing housing units. (See Section 7.5 for more information.)

The success of an inclusionary zoning program hinges on several factors. In a 2016 report, the Urban Land Institute (ULI) stated, “The single most important factor for an IZ [inclusionary zoning] policy to achieve its goals is a significant and sustained level of market-rate development in the local market.”¹³ In addition to the market conditions, the report found that factors that influence the success of a program include how well it is designed and administered. Programs typically require development incentives to maintain development project feasibility and profitability, and incentives must be structured to avoid adverse effects. The following sections provide more detail on the major incentives used with inclusionary zoning policies.

7.3 DENSITY BONUS

Density bonuses allow developers to build larger developments, often in terms of height or Floor Area Ratio (FAR), than the standard zoning allows. They are used in inclusionary zoning policies as an incentive to offset costs for the provision of subsidized housing and also can be used to signal upfront the development desires of a local jurisdiction. ULI notes that “density bonuses are by far the most common form of incentive that accompanies IZ policies and are used in both voluntary and mandatory programs.”¹⁴ ULI notes that the effectiveness of density bonuses depends on the housing market (developing additional square feet must be profitable to be an incentive); it also cautions that density increases can bump projects into new construction cost categories and affect the attractiveness and efficiency of development layouts, which can cause additional costs or decreases in incentive effectiveness.



Examples of density bonus provisions include one from Doral’s current WHDB program, which provides 30% above the maximum number of dwelling units allowed in a land use category in return for the provision of two-thirds of the bonus units to be affordable to area workforce households. Miami-Dade County’s density bonus provisions are based on the percentage of set-aside workforce housing; **Table 7-1** shows density bonuses related to developments of 20 units or more.

Table 7-1: Miami-Dade WHDB Program Density Bonuses for Developments Over 20 Units

Workforce Housing Unit Set-Aside	Density Bonus
5%	5%
6%	9%
7%	13%
8%	19%
9%	21%
10%	25%

Source: Miami-Dade County

Table 7-2 shows the percentage of workforce units to set aside for various density designations as required by Palm Beach County’s WHDB. Also included are the density bonus amounts under the density bonus provision, which vary based on Future Land Use designation.

Table 7-2: Density Provisions for Palm Beach County Workforce Housing Program

Density Level	Required % Workforce Units
Standard Density	5%
Maximum Density	16%
Workforce Housing Program Density Bonus (Full)	34%
UC or UI	15%

Density ¹	Density Bonus Incentive
LR-1 through LR-3	Up to 30%
MR-5 through HR-18	Up to 100% ²
UC or UI	Not applicable

¹LR = Low Residential, MR = Medium Residential, HR = High Residential, UC = Urban Center, and UI = Urban Infill. The numbers associated with each designation indicate number of units per acre.

²Additional requirements apply over 30%.

Source: Palm Beach County

A recent study focusing on the local case of Palm Beach County found that the density bonus (along with other incentives of allowing more market units, less transportation investment, and faster development processing) compensated for profits lost to developers due to the County’s inclusionary housing provision as part of its Workforce Housing Program.¹⁵

Table 7-3 reproduces the summary table of profits for various zoning categories based on a scenario in which all affordable units are provided on-site. The first two rows of the table show profits (in terms of percentages) for standard and Planned Unit Development (PUD) density. PUD density profits exceed standard density at all zoning types: LR2 (single-family detached, two units per acre), LR3 (single-family detached, three units per acre), MR5 (single-family attached, five units per acre), and



HR8 (multifamily, eight units per acre). Profits under workforce housing requirements without the bonus provisions exceed those under standard density, but not PUD density. When the bonus provision is added, profit percentages exceed or are comparable to the profits under PUD density.

Table 7-3: Developer Profit before, during, and after Density and Other Bonuses Provided to Mitigate Costs of Workforce Housing (WFH) Provision (100% On-Site Example)

Profits Under:	LR2	LR3	MR5	HR8
Standard Density (no WFH)	24.7%	22.7%	15.9%	0.9%
PUD Density (no WFH)	33.2%	32.9%	22.8%	11.4%
With Workforce Housing (without bonus provisions)	26.1%	26.7%	18.4%	8.1%
With Workforce Housing (with bonus provisions)	32.5%	33.1%	29.8%	24.3%

Source: Reproduced from Robert W. Burchell, William Dolphin, and Carole Walker; Center for Urban Policy Research at Rutgers' Edward J. Bloustein School of Planning and Public Policy; 2006; Profitability Analysis of the Palm Beach County Workforce Housing Program Considering Current Bonus Provisions versus Original Profits under Zoning without Workforce Housing; p. 2

7.4 OTHER INCENTIVES

Aside from density bonuses, ULI highlights direct subsidies, tax abatements, and reduced parking requirements as inclusionary development incentives, also noting that fee waivers or discounts do not primarily influence a project's feasibility.¹⁶ ULI indicates that whereas the highlighted incentives can offset costs of inclusionary development, there are certain considerations to weigh in using each one. Direct subsidies help offset construction costs of inclusionary developments but also can be relatively expensive, particularly in high-cost markets. The diversion of public funds away from other priorities may spark public opposition as well. Tax abatements, which reduce annual operating costs, face the same issues as direct subsidies and may be at odds with other tax-based financing mechanisms, such as Tax Increment Financing (TIF). These abatements also are limited in that the tax burden of a development might be less than the subsidy needed to offset the inclusionary cost impacts. Parking requirement reductions can reduce construction costs since parking is expensive to build; they are effective when the amount of required parking is more than the market demand for parking related to the development. The effectiveness of the incentive also depends on what can be built instead of parking, how expensive parking is to construct, and how much parking is available elsewhere for development residents.

Regarding the effect of incentives when used without any mandated affordable housing provision, the Tindale Oliver regulation and incentive review found that incentives alone generally did not meet the needs of local Florida jurisdictions studied. All jurisdictions studied were using impact fee waivers and discounts as an incentive for affordable housing, and many also were using density bonuses, expedited permitting, flexibility in design/parking requirements, and home purchase/construction

assistance. It should be noted that some of the time frames over which the jurisdictions were studied include times of economic downturn, when construction of housing in general was limited.

7.5 LINKAGE FEES

Linkage fees are a type of impact fee that require non-residential development to pay to mitigate impacts on housing caused by development. Linkage fees require a nexus study to show how the amount paid will be based on the actual impact of the development (**Figure 7-1**).

According to the Tindale Oliver review of affordable housing incentives and regulations for local jurisdictions in Florida, the Town of Jupiter and the City of Coconut Creek currently have active linkage fees. Jupiter has collected about \$300,000 from linkage fees and in-lieu fees from its inclusionary development requirements since 2015. Coconut Creek highlighted an advantage of linkage fee funds in that they are more flexible since the City can use them for various programs related to subsidized housing. (See **Appendix A** for more information.)

Although linkage fees have some constraints because they operate as an impact fee, their use in other local Florida jurisdictions and the ability to use them in conjunction with inclusionary zoning and in-lieu fees makes them a potential strategy for affordable housing provision.

7.6 AFFORDABLE HOMEOWNERSHIP PROGRAMS

Local governments can support homeownership subsidy programs with actions that include providing funding, land, and administrative assistance. Revenues from some of the workforce housing strategies already discussed, such as in-lieu and linkage fees, can supplement funding from State and federal sources for homeownership subsidy programs focused on workers in the workforce housing range. The City also should evaluate the feasibility of a community land trust, particularly with homeownership, which provides certain advantages in terms of land costs and the ability to apply subsidies to multiple homebuyers. The following section provides more information.

7.7 COMMUNITY LANDS TRUSTS

Florida has a number of community land trusts, including a regional community land trust in South Florida that separates ownership of the land and the property on it. A non-profit corporation will hold the title of the land and provide a long-term lease to a homebuyer with qualifying income (in the case of Doral, in the workforce income range) who buys the property or for affordable rental properties (**Figure 7-2**). The community land trust model makes the housing less expensive in that the buyer of the property does not have to purchase the land as well. A homeowner can build some equity in

Figure 7-1: Mixed-Use Development



Source: South Florida Business Journal - <https://www.bizjournals.com/southflorida/news/2016/03/17/developer-selects-publix-for-massive-mixed-use.html>

reselling the property, but to maintain affordability for future homebuyers, the homeowner is not allowed to sell on the open market. The resale price is determined based on a formula to provide some return from appreciation to the homeowner, but keep the price affordable for the next buyer meeting income requirements. In this way, the initial subsidy for the housing is recaptured and “reused” for the next buyer, ensuring affordability in the long-term.

According to the Florida Community Land Trust Institute and the Florida Housing Coalition, the government’s role in a community land trust is often to provide land on which housing can be built and to provide administrative support to the community land trust.¹⁷ They also note that the size of areas typically served by a community land trust vary, including neighborhood-level to spanning several counties.

J. Michael Collins of the University of Wisconsin-Madison notes that community land trust models are worthy of consideration relative to other homeownership subsidy policies and sets out some advantages and drawbacks of the community land trust approach.¹⁸ Advantages include the ease of targeting specific populations of focus, the ability to recapture subsidy to apply to various homebuyers, the lower risk of default experienced by homeowners, and the potential for neighborhood revitalization since a number of homes are often involved in an area. However, this approach is not particularly scalable, has high administration costs, and may limit mobility if residents need to relocate (for example, for a job) and other community land trust options are not widely available. The ability of community land trusts to transition renters to homeownership depends on the level of subsidy passed among the successive homebuyers.

Based on discussions with Palm Beach County, it is also possible to put in place regulations for workforce housing that restrict resale of for-purchase workforce units to certain resale prices and income-qualified buyers without reliance on a community land trust. In the case of Palm Beach County, if an owner of a workforce unit sells the unit within 15 years of purchase, the owner must sell at an equity-limited price to another income-qualified buyer. If the owner does not sell within the first 15 years of ownership, the owner can sell on the open market.

7.8 KEY TAKEAWAYS FOR 7.0

- Mandated inclusionary zoning programs with in-lieu fees and accompanying incentives have shown to be effective in the provision of workforce housing. Density bonuses often are used and have been shown to be effective in maintaining the profitability of development. Other effective incentives include direct subsidies, tax abatements, and reduced parking requirements.

Figure 7-2: Community Land Trust



Source: South Florida Community Land Trust - <http://southfloridaclt.org/our-properties/>



- Fee waivers and discounts or incentives used without mandatory requirements have not been shown to be effective in the provision of workforce housing.
- Linkage fees have some constraints in the amount of revenue they can generate for workforce housing, but they can be used with an inclusionary zoning policy.
- Revenue from workforce housing strategies such as in-lieu and linkage fees can supplement state and federal revenues for existing homeownership programs in Doral.
- Community land trusts help lower the land value costs of housing and are advantageous for affordable homeownership since the subsidy provided can aid multiple qualifying homebuyers. Reuse of the subsidy can also be achieved through regulations not reliant on a community land trust.



SECTION 8 PERFORMANCE METRICS

Performance metrics help define and measure success of an effort. Some considerations for developing performance metrics for this Master Plan include how to make them:

- Comprehensive enough to give an overall picture of success.
- Targeted and detailed enough to have a meaningful measure of success.
- Simple enough to be easily measured and updated by those responsible for tracking and easily understood by general audiences.

One baseline measure of success for this Housing Master Plan is ensuring that the amount of currently affordable stock is at least maintained over time. For rental properties, a more detailed study is recommended to better understand the percentage of affordable units in the city since this level of detail in the data are not readily available. In this way, the City can establish a baseline that can serve as a target to maintain. If the City eventually decides to focus on for-purchase units, it can take a similar approach. The number of units affordable at the workforce income range is currently 5,162, as noted previously in Section 5.0, which is approximately 28% of the total number of for-purchase units.

Tracking the number of affordable units, both for-purchase and rental, is recommended as part of the implementation of this Master Plan. The City can use these data to evaluate whether it meets the established maintenance targets and can also use data collected in the initial years as a basis for re-evaluating the maintenance target to determine in the future whether to shift to a target of increasing the stock affordable to households with incomes in the workforce housing range. Tracking strategies can include a yearly survey of major existing developments every year to gather rental rates (often available online) and requiring new developments to report annually. For-purchase unit affordability may be estimated by tracking just value, although this can underestimate the cost of actually purchasing the house.

8.1 KEY TAKEWAYS FOR 8.0

- To define and measure success of implementation of the Workforce Housing Master Plan, the City should establish a target of maintaining at least as much rental stock affordable to those with incomes in the workforce housing range as is currently available. A detailed follow-up study is needed to establish the level of rental units in the city that are currently affordable to those with incomes in this range to use as a baseline.
- If the City eventually includes for-purchase housing as a focus, it can take a similar approach of maintaining a baseline number of units affordable to those with incomes in the workforce income range. Currently, approximately 28% of for-purchase units in the city are affordable to those with incomes in this range.
- The City should track the number of affordable units, both for-purchase and rental, over time as part of implementation of the Master Plan. This information will help measure success of



reaching the target, provide information for any evaluation of shifting from maintaining the stock that is affordable at workforce incomes to increasing that stock as a percentage of total units, and provide information for any evaluation of including for-purchase units as a focus. Tracking strategies might include an annual web survey of rental unit prices, annual price reporting by new rental developments, and tracking just value of for-purchase units.



SECTION 9 MANAGING A WORKFORCE HOUSING PROGRAM

The City of Doral currently does not have a traditional Housing or Community Development Department, which typically would handle oversight of any housing grants and funding programs (i.e., SHIP, HOME, CDBG, etc.) and would be well-positioned to manage the operations of the Workforce Housing Program. However, the City does have a robust Planning & Zoning Department that, with some additional resources, could manage the different elements of the Workforce Housing Program as proposed. Although a detailed staffing assessment is beyond the scope of the Master Plan, a preliminary framework for implementation is described below based in part on the model used in Palm Beach County, which has a comprehensive workforce housing program.

The proposed program elements as identified under the Primary Recommendations within this report would require active management of the following areas:

- **Development Review for Proposed Workforce Housing Projects** – The Planning & Zoning Department currently performs review processes for projects that choose to use the WHDB. This would continue to be the case with the implementation of updated requirements, although the likely increase in the volume of projects may require more resources.
- **In-Lieu Fee Collection** – For developers who choose to use the in-lieu fee option over providing workforce housing units, a fund will need to be established in which fees can be collected to be used for housing-related projects. It is expected that the City would use the fee collection infrastructure currently in place for impact fees, permitting fees, etc. Although the implementation of a new in-lieu fee for workforce housing will require some additional fee collection, it is expected that existing staff can manage the additional volume.
- **Tracking Workforce Housing Rental Unit Stock** – For developments that decide to build the required workforce housing units, there will be a need to track the following items on an ongoing basis:
 - *Mix of units and quality* – Staff will need to ensure that a developer provides the appropriate number of units and the mix of unit sizes (required to be a mix consistent with the overall development as a whole). This will occur during the rezoning/site development plan review process.
 - *Income qualifications* – For workforce rental housing, potential tenants will need to have their income qualified to ensure that they meet the requirements to live in a workforce housing unit. It is recommended that this qualification process be undertaken by the apartment management companies of the individual developments.
 - *Annual reporting* – On an annual basis, the apartment management companies will be required to produce a report documenting the number and type of units that are



- designated for workforce housing, the occupancy rate for those units, and the number of years remaining that the units must remain in the workforce housing pool.
- **Tracking Workforce Housing Ownership Unit Stock** – Tracking workforce housing ownership units that are for sale also will require oversight on the part of the City. For developments that provide their required workforce housing in the form of “for sale” units, the City will have to play a more direct role in tracking those items identified above. Some differences from the rental stock include the following:
 - *Mix of units and quality* – This will be addressed in a fashion similar to rental housing, with the review of unit types being conducted during the development review process.
 - *Income qualifications* – Since there are not typically management companies charged with tracking units after they are sold, it will be the responsibility of the City to keep track of the existing “for sale” workforce housing stock to ensure that it is initially sold to an eligible buyer and that it maintains its affordability throughout the required period. These conditions are typically addressed in the sales documents, which will include restrictive covenants related to how affordability will be maintained.
 - *Annual reporting* – Owners of designated workforce housing units will be required to report annually to the City for tracking purposes. This information will allow the City to identify the total number of units, document any sales that have occurred, and identify the number of years remaining that the housing stock must maintain affordability.
 - **Management of In-Lieu Fee Expenditures** – Although it will take some time to build the housing fund, as it grows, there will be a need for the City to manage the expenditure of those funds. Although it is beyond the scope of this Master Plan to identify a detailed list of types of expenditures, these could include a variety projects and programs related to the provision of workforce housing including, but not limited to:
 - Provision of down payment assistance for workforce housing units.
 - Purchase of land to be utilized for the provision of workforce housing.
 - Seed funding in support of the creation of a Community Land Trust.

9.1 KEY TAKEAWAYS FOR 9.0

- In the short term, the City should designate a member of the Planning & Zoning team to manage the workforce housing program as it gets underway, with the intent of creating a staff position committed to this program within two years of its inception. This, along with the existing supporting staff and processes already in place, will provide the necessary oversight needed for the initial years of operation to carry out management, as described in Section 9.0. However, each program evolves differently, and it is important that the City evaluate the program on an annual basis to ensure that the necessary staffing is being provided to maintain an efficient and effective program.



SECTION 10 RECOMMENDATIONS

The following recommendations are based on background information on Doral and information gathered on key workforce housing strategies.

PRIMARY RECOMMENDATIONS

The workforce housing program should focus on public employees and young professionals in target industries. These professionals help run the City administratively and play a key role in the City's future economic development.

Adopt a workforce housing income range of 60–150% AMI. The analysis indicates that this range will adequately capture salaries for the target workforce populations and family incomes; the range also captures a population for which there are limited market-rate housing options.

Direct solutions toward future non-single-family development types. Multi-family rental units should be the focus in the near-term to ensure the timely provision of workforce units. Eventually, multi-family for-purchase units, such as condos, may also become a focus. These multi-family units need to accommodate a variety of household sizes that may be present in the qualifying population. One strategy for accommodating a range of household sizes is to use provisions such as those in the existing WFHDB program for Doral, which requires the mix of unit sizes for workforce units to match the mix for market-rate units in a mixed-income development.

Prioritize solutions as long-term, as it may take years to realize a significant impact. Additional development likely will be needed to house the 45% of projected population growth through 2030 that is not estimated to be housed by developments being built through 2021. The City should adopt workforce housing provisions as soon as possible to ensure their application to future development and to capitalize on opportunities to apply these provisions for projects currently in the development process that may require adjustments (such as seeking additional units).

Identify tools for targeting workforce housing provision to areas of opportunity in the city, which may include commercial corridors, the brownfield area, the Doral Design District Core, and in the longer term, annexation areas. Targeting areas of opportunity will direct workforce housing to desired areas and protect existing single-family neighborhoods. In addition to any savings in project development due to lowered land costs, the industrial brownfield area can receive incentives to be properly cleaned up and encourage workforce housing as part of any development and redevelopment plans. The City also can use its land use and zoning authority and its ability to target additional incentives and programs to ensure that land use and zoning decisions facilitate the provision of workforce housing. In identifying target areas for workforce housing, the City should ensure that units are not overly clustered in one geographic area. The City should also formulate provisions to apply strategies to any future annexation areas.



Adopt a mandated inclusionary zoning program with a density bonus incentive and in-lieu fee option. As noted in Section 5.0, Doral is growing, and there is development activity occurring in the city. Although much of the housing need through 2030 will be met by current development, more units will be needed to house the remaining 45% of the estimated new residents. The City should put a mandated inclusionary program in place to ensure that workforce housing is a part of this future development, particularly in light of the success seen in other Florida jurisdictions. Such a program can also allow the City to capitalize on any opportunities to provide workforce housing in projects currently in the development process (for instance, if they make adjustments to seek additional units). This approach also allows the City to modify the voluntary program it already has in place to make it more effective. With the option of an in-lieu fee, the funds generated from these fees can be used to support workforce housing development in the targeted areas.

Consider additional incentives such as subsidies, tax abatements, and reduced parking requirements. The City might consider the feasibility and legality of these other effective incentives to see if they are appropriate for Doral. These additional incentives might be applied in addition to an incentive such as a density bonus to target areas to further incentivize the provision of workforce housing in desired locations.

Designate a Planning & Zoning staff member to oversee the workforce housing program at the start, with a plan to create a committed staff position within two years. In the short term, the City should designate a member of the Planning & Zoning team to manage the workforce housing program as it gets underway with the intent of creating a staff position committed to this program within two years of its inception. This, along with the existing supporting staff and processes already in place, will provide the necessary oversight needed for the initial years of operation to carry out management as described in Section 9.0. However, each program evolves differently, and it is important that the City evaluate the program on an annual basis to ensure that the necessary staffing is being provided to maintain an efficient and effective program.

SECONDARY RECOMMENDATIONS

Consider adopting a linkage fee in conjunction with the inclusionary zoning program. A linkage fee can support workforce housing provisions and programs and incorporates housing impacts from new commercial development. Given the non-residential development currently proposed or being built in Doral, the City should explore further its ability to support a linkage fee. However, this recommendation is secondary to the inclusionary zoning with in-lieu fee and incentive recommendation given the need to legally defend the application of the linkage fee through a nexus study (as described in Section 7.0).

Evaluate existing homeownership assistance programs that might support workforce housing. Doral's existing homeownership programs should be evaluated to understand their effectiveness and how well they target the workforce housing population of interest for the Housing Master Plan. This evaluation will help indicate if program changes are needed or if these programs primarily need to be



supported and expanded by additional funds (such as those generated from in-lieu fees and linkage fees). Additionally, the City can consider regulations requiring equity-restricted resale on for-purchase workforce units to allow for subsidies to serve multiple income-qualifying homebuyers, similar to a community land trust.

Consider areas that might eventually be served by a community land trust. The community land trust approach may be a particularly effective way for Doral to address heightened land values in workforce housing provision, although it is a secondary recommendation given the limited amount of City-owned land currently available. The City can plan for this approach as it generates revenues from primary workforce housing strategies, such as in-lieu fees, to focus towards target areas and also as it annexes any new lands that might provide opportunities for a community land trust. The City can also begin to foster relationships with community land trust organizations operating in the region and in nearby communities to prepare for future opportunities.



ENDNOTES

¹ Florida International University Metropolitan Center, 2017, "City of Doral Economic Analysis, Report I: Competitive Assessment," p. 6.

² *Ibid.*, p. 8.

³ Center for Housing Policy, 2011, "The Role of Affordable Housing in Creating Jobs and Stimulating Local Economic Development: A Review of the Literature."

⁴ Lawrence Yerkes, 2007, "Affordable Housing Near Jobs a Problem for Employers and Employees," *ActiveRain*, retrieved from <http://activerain.com/blogsviw/122440/affordable-housing-near-jobs-a-problem-for-employers-and-employees>.

⁵ Mai Thai Nguyen, 2005, "Does Affordable Housing Detrimentially Affect Property Values? A Review of the Literature," *Journal of Planning Literature*, Vol. 20, No. 1.

⁶ Ingris Gould Ellen, 2007, "Spillovers and Subsidized Housing: The Impact of Subsidized Rental Housing on Neighborhoods," Joint Center for Housing Studies Harvard University RR07-3, prepared for Revisiting Rental Housing: A National Policy Summit, 2006.

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⁸ *Ibid.*, pp. 6-7.

⁹ NYU Furman Center, "2017 National Rental Housing Landscape: Renting in the Nation's Largest Metros."

¹⁰ South Florida Community Land Trust Network, 2016, "10 Years of Community Land Trusts in South Florida."

¹¹ Emily Thaden & Ruonio Wang, 2017, "Inclusionary Housing in the United States: Prevalence, Impact and Practices," Lincoln Land Institute Working Paper WP17ET1.

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¹³ Urban Land Institute, 2016, "The Economics of Inclusionary Development," p. ix.

¹⁴ *Ibid.*, p. 15.

¹⁵ Robert W. Burchell, William Dolphin, & Carole Walker, 2006 "Profitability Analysis of the Palm Beach County Workforce Housing Program Considering Current Bonus Provisions versus Original Profits under Zoning without Workforce Housing," Center for Urban Policy Research at Rutgers' Edward J. Bloustein School of Planning and Public Policy.

¹⁶ Urban Land Institute, 2016, "The Economics of Inclusionary Development."

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¹⁸ J. Michael, Collins, 2013, "Developing Effective Subsidy Mechanisms for Low-Income Homeownership," Joint Center for Housing Studies Harvard University paper HBTL-08, presented at Homeownership Built to Last: Lessons from the Housing Crisis on Sustaining Homeownership for Low-Income and Minority Families.



APPENDIX A

Initial Assessment and Analysis Memo

To: Julian Perez, AICP, CFM, Planning and Zoning Director (City of Doral)
From: Evan Johnson, AICP, LEED AP, Project Manager (Tindale Oliver)
Subject: Doral Housing Master Plan – Assessment and Analysis
Date: May 30, 2018

1.0 Introduction

In 2016, the City adopted a Workforce Housing Density Bonus (WHDB) program that created development incentives for workforce housing allowing for increased development density in exchange for workforce housing units. The WHDB program defines workforce housing units as those for households with an annual income between 65% and 140% of the Area Median Income (AMI) as established by the U.S. Department of Housing and Urban Development (HUD). In accordance with City Ordinance 2017-07 (May 24, 2017), a moratorium was placed on the WHDB program to provide an opportunity to complete the Housing Master Plan.

The purpose of this memorandum is to provide the background data and analysis to support the development of a Housing Master Plan (Master Plan) which will address the need for workforce housing within the City of Doral. Through the development of the Master Plan, the City seeks to facilitate the provision of housing by the private sector that is affordable for both workers currently commuting from other areas in the region as well as those who will find themselves working in Doral as the economy continues to grow and diversify. The completed Housing Master Plan will evaluate existing housing stock and needs, analyze legislative mandates, and propose policies to address workforce housing in Doral and related local housing issues. This memorandum includes the background data analysis needed to begin to understand the specific challenges that the City is facing in providing housing for its growing workforce.

Key Takeaways and Conclusions

This memorandum examines a number of datasets and indicators to paint an overall picture of the availability of workforce housing within the City of Doral. The analysis examines a city and a region that with housing prices that limit accessibility to many in the workforce including essential government employees such as police officers, firefighters, and teachers among others. This lack of affordability not only affects current employees working in Doral, it has the potential to affect the ability of companies to locate their offices and employees in Doral. Without action, the problem will likely be exacerbated further if housing values continue to climb.

The remainder of this section includes a summary of key takeaways and conclusions of the data and analysis contained within this report.

- The Comprehensive Plan projects Doral's population to increase to 103,421 by 2030 – a 74% increase over the current 2016 estimate of 59,304 from the Bureau of Economic and Business Research (BEBR) at the University of Florida. At 3.42 persons per household (2015 ACS

estimate), this translates into 12,900 new housing units (56% increase from existing 23,056 housing units). This demand will provide challenges for the City. However, growth will provide new units, and there may be opportunities through regulations and incentives to encourage some of those units to be developed as workforce housing.

- There are currently 15,227 new units planned/approved to be built through the year 2021 in Doral. According to City estimates (based on 2.5 persons per household) these new units will provide housing for 38,072 new residents, or 86% of the projected population growth through 2030.
- The Area Median Income (AMI) for Miami-Dade County is \$51,800 while the estimated household income for the City of Doral is \$72,933. This is important as most affordable housing programs (including the City's Workforce Housing Density Bonus Program) use the AMI to identify housing targets and income limits, which can be more challenging for areas with higher incomes and housing prices. The AMI falls closer to salaries of public employees (as described in **Section 2.4.6** of this memorandum) and the majority of those that are currently commuting into Doral for employment.
- Using 2016 property appraiser data it is estimated that there are 4,219 non-rental units (single-family homes, condos, and townhomes) in Doral (occupied and unoccupied) that are currently affordable for a household making 140% of the AMI. This represents approximately 22.5% of the entire non-rental housing stock. The number of units increases to 9,381 if the household median income is used, which represents approximately 50% of the total non-rental housing stock. It is important to remember that most of these units are affordable only for those near the top of the workforce housing income range.
- The American Community Survey estimates that 34% of mortgage paying households are cost burdened (paying more than 30% of income on housing) and that 57% of rental households are cost burdened. As summarized in **Table 2-16**, the percentages are fairly consistent with those for Miami-Dade County as a whole, though the County's percentage of rent burdened households is at 65%.
- Starting Salaries for 33 of the City's 184 (18%) occupation categories fall below the lower end of the current workforce housing salary range of 65% of AMI (**Table 2-20**). Mid-Point salaries for police officers, firefighters, and teachers all fall within the workforce housing income range of 65%-140% AMI.
- As of 2016, the majority of the housing stock (52.9% of total units) in Doral has been built since the year 2000, and the largest share of housing units built within that timeframe has been condominiums (32.5%). Based on current values, condominiums are on average more affordable than single-family and townhome units, but as shown in **Table 2-14**, the median values of condominiums built since 2000 still fall between \$200,000 and \$215,000, which would be considered out of the reach of someone who falls within the workforce housing income range of 65%-140% AMI.
- **Table 2-18** summarizes the total number of existing non-rental units that are potentially within reach for those falling within the workforce housing income range. At 100% AMI (\$51,800) there are a total of 1,638 units (7.1% of total units) that are affordable for purchase. At 140% of AMI

(\$72,520) there are 4,219 units (18.3% of total units) that are affordable for purchase. These unit numbers represent occupied and unoccupied units, so at any given time there are likely very few that are available on the market. Furthermore, as shown in **Table 2-15**, sales prices in 2015 and 2016 are well above the median and average values summarized in **Table 2-12**, which could mean that increasing values are further reducing the number of units that could be considered affordable workforce housing.

- As summarized above, there are a limited number of existing housing units affordable for those falling within the workforce housing income range. But what about constructing new housing? The bullets below present an estimate of costs for constructing new housing using median just value per median square foot based on existing units in 2016.
 - The median value for detached single-family homes is \$176.52 per square foot.
 - At 65% of AMI this would equate to a 476 square foot unit.
 - At 100% AMI this would equate to a 733 square foot unit.
 - At 140% AMI this would equate to a 1,027 square foot unit.
 - The median value for a townhome is \$175.05 per square foot.
 - At 65% of AMI this would equate to a 480 square foot unit.
 - At 100% AMI this would equate to a 739 square foot unit.
 - At 140% AMI this would equate to a 1,035 square foot unit.
 - The median value for a condominium is \$155.18 per square foot.
 - At 65% of AMI this would equate to a 542 square foot unit.
 - At 100% AMI this would equate to 834 square foot unit.
 - At 140% AMI this would equate to a 1,168 square foot unit.

These numbers illustrate the challenge of building new housing for purchase that would be affordable to those falling within the workforce income range, particularly towards the lower end of that range. This challenge may be made even greater if the costs per square foot estimated above are significantly lower than what the current market construction/land costs dictate. If any non-rental product is to be built as workforce housing, costs dictate that it will likely not be single-family housing. If the units are townhomes or condominiums, they will likely be significantly smaller than the average unit sizes that are currently found in the city.

- **Table 2-13** summarizes average unit sizes which have continued to increase through 2016 for single family homes (36.9% since 1970), condominiums (16.9% since 1970), and townhomes (5.9% since 1980).
- Rental apartments make up approximately 18.6% of the total housing stock (as of 2016). Given the cost issues with developing new units for purchase as described above, new workforce housing units will likely need to be rental.

As summarized in the bullets above, the City of Doral faces a number of challenges related to the provision of workforce housing, which will likely require a mix of public sector and private sector solutions to address. In addition to the data analysis included within this memorandum, the final Master Plan will include policy direction and specific recommendations on how the City should move forward in addressing its workforce housing need. These recommendations will need to utilize a variety of tools

and approaches to ensure that reasonable targets are set and useful performance measures are put in place to track progress.

Key Questions

As summarized above, the City of Doral faces a significant challenge in providing its current/future workforce affordable housing options. There a number of key questions that the City should consider to help guide the development of the Housing Master Plan. These are listed below.

- What is the workforce that the City is focused on attracting with its workforce housing program? Currently housing costs are such that key government personnel (teachers, police officers, firefighters) cannot afford to live in Doral. Does the City value providing housing opportunities for those members of the workforce? What other members of the workforce should be targeted?
- How will the City define success? What are the goals, and what data sources and performance measures are needed to track progress towards those goals?
- Is there interest/political will to implement mandatory requirements (i.e. inclusionary zoning, in lieu fees, linkage fees, etc.) in addition to voluntary incentives (i.e. bonus development density, expedited permitting, reduced fees, etc.)?
- Where are the best locations for new workforce housing? Are there key areas where new development/redevelopment could accommodate new workforce housing? Where are the areas that can accommodate more density/intensity? Are there areas where community resistance may create issues?

The answers to each of these questions will help define targets to aim at and the tools to be utilized in developing a program to development workforce housing.

The remainder of this document provides the initial assessment and analysis to inform future phases of this planning effort. **Section 2.0** of this memorandum provides an overview of existing conditions within the city. It includes an analysis of demographic and socioeconomic information; plan document review; transportation system; land use and housing; and workforce housing demand. **Section 3.0** includes a review of literature on housing affordability to contextualize the efforts of Doral, as well as state legislation and local case studies to understand how housing affordability is being addressed in Florida. **Section 4.0** analyzes future conditions as they relate to expected housing development and population and employment growth. **Section 5.0** provides a quick summary of next steps for the project.

2.0 Existing Conditions

This analysis of existing conditions aims to provide insights into the social, administrative, built environment, and economic aspects of the City of Doral. The demographic and socioeconomic information illustrates where people live and how densely; current resident incomes to understand what residents can afford; and employer-household dynamics to assess the inflow/outflow of workers. A review of the City's Comprehensive Plan and Development Ordinance is identifies goals/intent, and important policies and regulations for the implementation of workforce housing. Details on the quality of service and available infrastructure for different types of transportation provides insights into how

residents might travel between existing/future housing and various destinations. The final parts of this section focus on housing more directly, including an inventory and characteristic images of housing, as well as workforce housing demand based on availability and affordability of existing housing.

2.1 Demographics/Socioeconomic Data

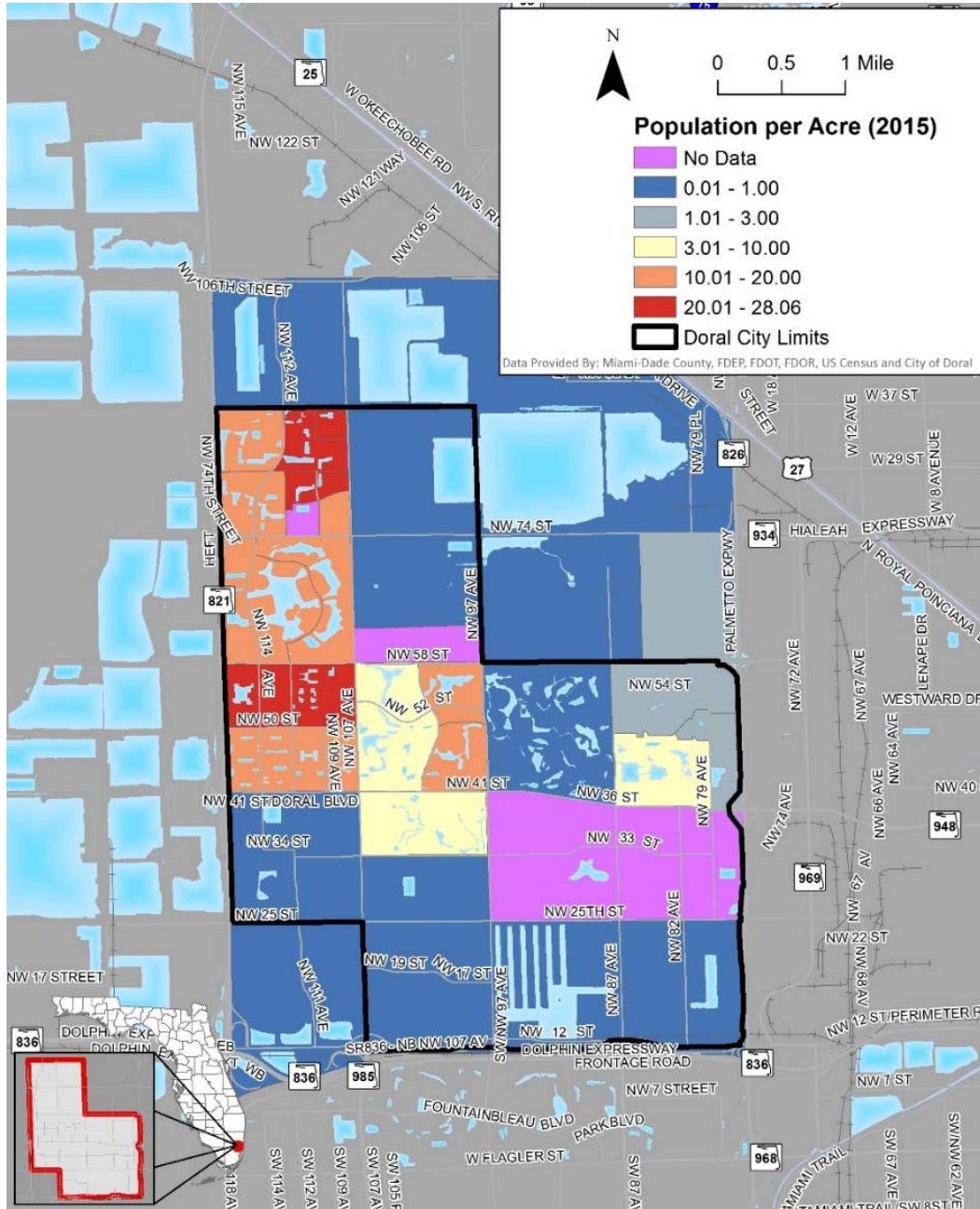
To provide a general overview of the City of Doral, an assessment of the population density, median income, and employer-household dynamics was conducted to determine existing concentration of residents, areas of income disparities, and inflow/outflow of workers.

Doral's population in 2016 was 59,304, based on an estimate from the Bureau of Economic and Business Research (BEBR) at the University of Florida. This estimate shows an increase of 29.8% since the 2010 Census count of 45,704, and a 6.5% increase over the 2015 BEBR estimate of 55,660. While these are estimates subject to a margin of error, they do illustrate the significant amount of growth being experienced in Doral.

2.1.1 Existing Population Density

The 2015 American Community Survey (ACS) block group data was used to examine the population of Doral as it is the most current and comprehensive dataset available. The Census block groups do not align entirely with the City limits of Doral, which causes areas outside of the City to be shown as well as within the City. This does not affect results significantly due to the fact that most areas outside the City limits have a low residential population. The City of Doral is currently divided along Doral Blvd./NW 41st St./NW 36th St. with the residential primarily to the north and employment centers to the south. This division of residential and non-residential explains the stark difference in population densities seen in **Map 2-1**. The northern portion of Doral consists of higher density multi-family and single family homes which will be described further in **Section 2.4.1**.

Map 2-1: Existing Population Density (persons per acre)



(Source: 2015 ACS)

Note: Block Groups with no data are due to having no permanent residents during the 2015 ACS

2.1.2 Median Income

The median income of Doral is considerably higher than the surrounding communities and Miami-Dade County as a whole (**Table 2-1** and **Figure 2-1**). **Map 2-2** illustrates the distribution of income throughout the city. Due to the segregated nature of Doral’s population in relation to non-residential uses (as illustrated in **Map 2-1**) there are areas, particularly in the far north and south of the city that have either very low or high median incomes respectively. This is likely due to the small existing populations in these areas skewing the data.

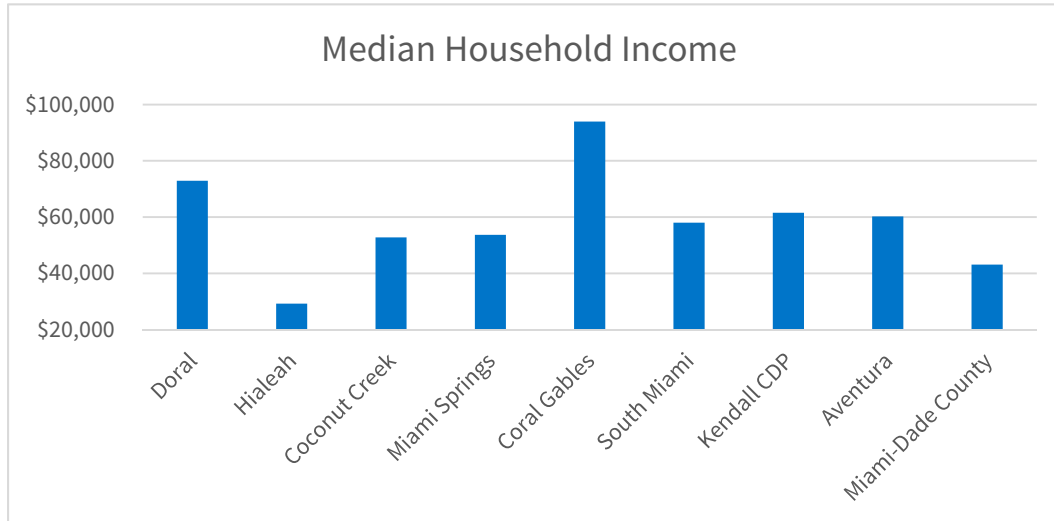
In addition to the median income information identified for specific locations in **Table 2-1** the Department of Housing and Urban Development (HUD) also identifies an Area Median Income (AMI) for regions that it uses for the purposes of determining eligibility for affordable housing programs. Since the AMI is regional in nature, it is typically near the middle of the range for the cities and counties that constitute the specific region. The current AMI for Miami Dade County is \$51,800. In addition to the fact that HUD uses the AMI to determine eligibility for its programs, the City of Doral has also identified the AMI in the currently adopted Workforce Housing Density Bonus Ordinance (Sec. 74-886). The gap between the AMI and the median household income as reported in **Table 2-1** presents a particular challenge for higher income jurisdictions such as Doral. This difference will need to be considered as policy is developed.

Table 2-1: Regional Median Household Income Comparison

Jurisdiction	Median Household Income
Doral	\$ 72,933
Hialeah	\$ 29,249
Coconut Creek	\$ 52,800
Miami Springs	\$ 53,688
Coral Gables	\$ 93,934
South Miami	\$ 58,047
Kendall CDP	\$ 61,554
Aventura	\$ 60,222
Miami-Dade County	\$ 43,129

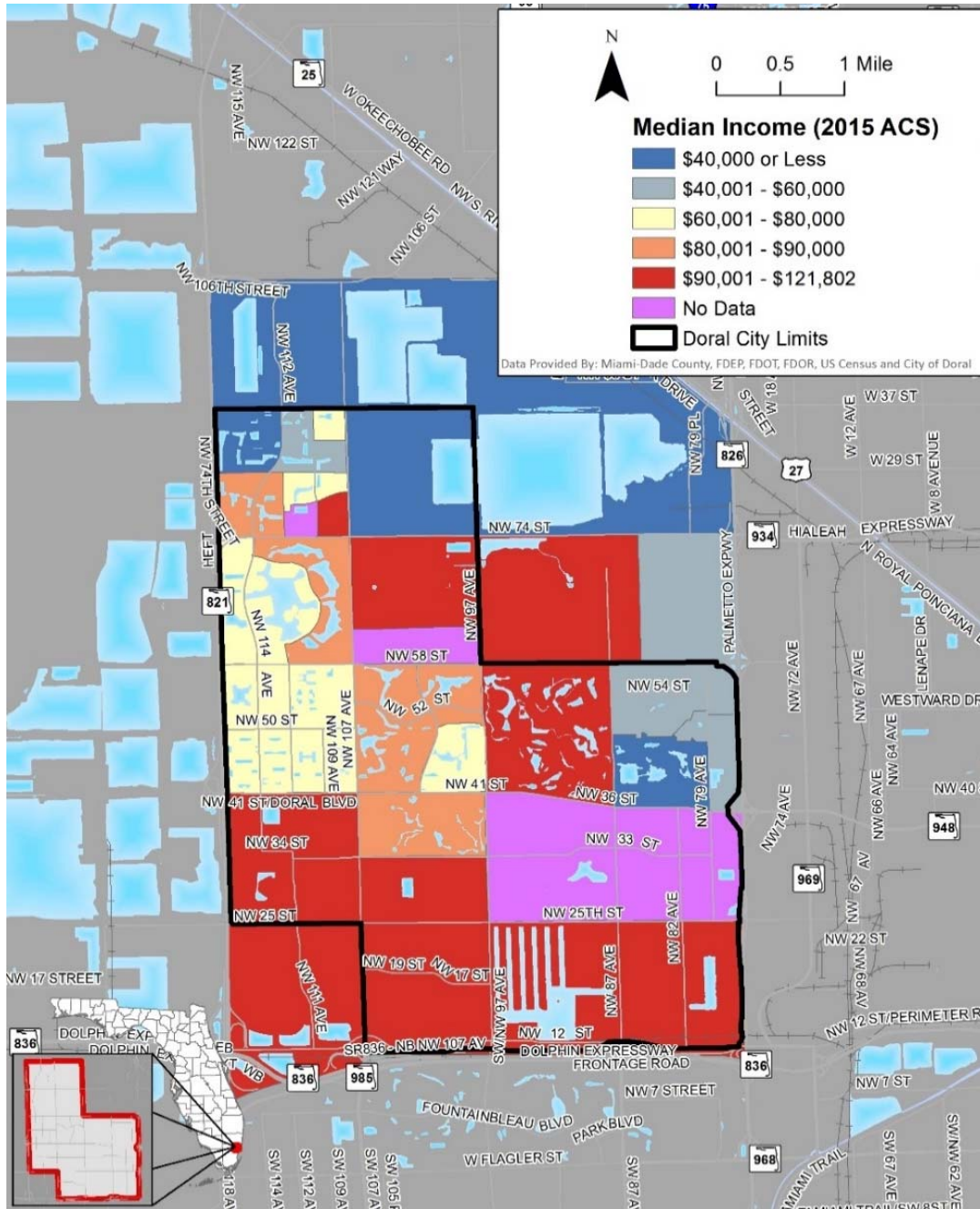
(Source: 2015 ACS)

Figure 2-1: Regional Median Income Comparison



(Source: 2015 ACS)

Map 2-2: Median Household Income



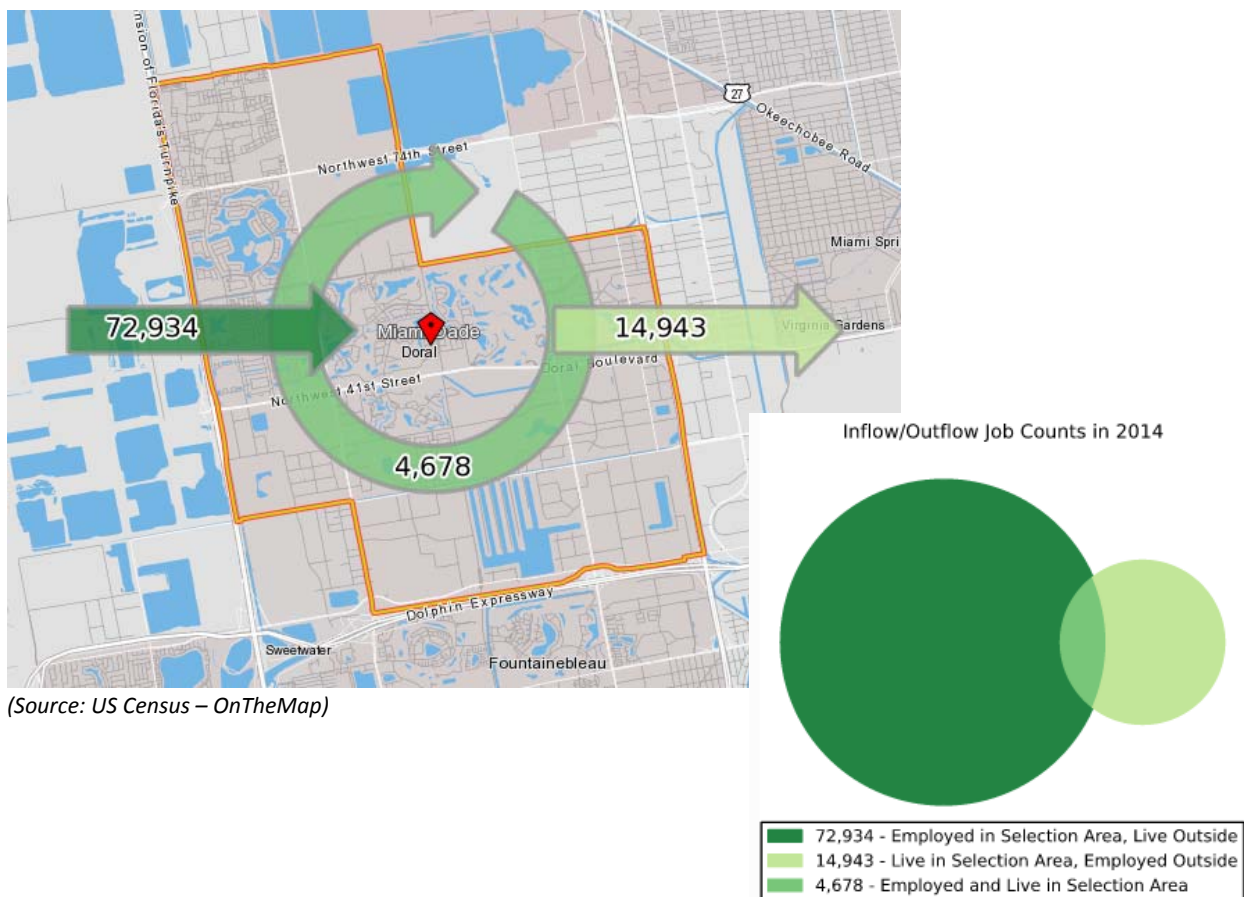
(Source: 2015 ACS)

Note: Block Groups with no data are due to having no permanent residents during the 2015 ACS

2.1.3 Employer-Household Dynamics

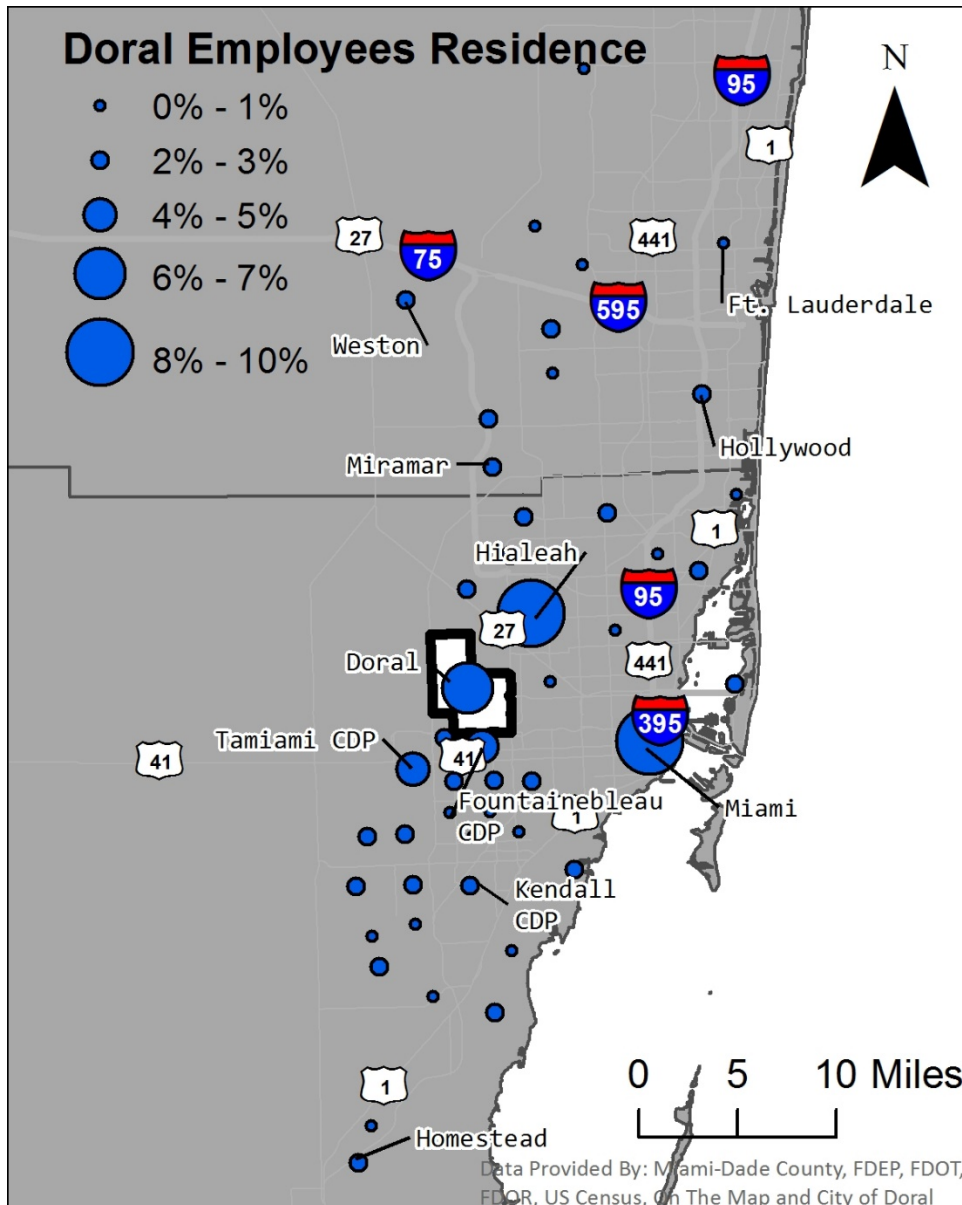
The following graphics are obtained from the US Census’ OnTheMap tool which utilizes Longitudinal Employer-Household Dynamics (LEHD) data drawing from existing Census figures and combines them with Bureau of Labor Statistics employment and wage data. The inflow and outflow of all jobs in Doral shows that the city primarily attracts outside workers with just under 73,000 workers entering the City on a daily basis, as seen by the dark green arrow and the large dark green circle in **Map 2-3**. Meanwhile, less than 5,000 people live and work within the City, shown as the circular arrow and overlap in the two circles, and about 15,000 leave the city to work elsewhere. **Map 2-4** identifies the daily inflow of employees into Doral, which is mostly from the cities of Miami and Hialeah. With nearly 73,000 employees coming to the city on a daily basis, the inflow and outflow of workers creates major strain on the transportation network and reveals a job market that caters to those with lower incomes than the City’s median household income.

Map 2-3: Employer-Household Dynamics



(Source: US Census – OnTheMap)

Map 2-4: Doral Employees Residence



(Source: US Census - OnTheMap)

Table 2-2 breaks down the industries within Doral. The majority of the jobs within Doral are within the wholesale, transportation/warehousing, retail and administration/support sectors. With those industries accounting for nearly 60% of all employment, it is logical that as shown in **Table 2-3** that 62% of employees in Doral are earning less than \$3,333 per month (approximately \$40,000 annually). When paired with the inflow/outflow graphics, the commuting patterns show that a working class majority of employees is commuting daily into Doral for work from elsewhere and not living within the city.

Table 2-2: Local Industries

Industry Sector	Jobs	Percent of Total
Wholesale Trade	15,359	19.2%
Transportation and Warehousing	11,893	14.8%
Retail Trade	10,790	13.5%
Admin/Support, Waste Management and Remediation	9,385	11.7%
Accommodation and Food Services	7,062	8.8%
Professional, Scientific, and Tech Services	5,842	7.3%
Health Care and Social Assistance	3,354	4.2%
Finance and Insurance	3,115	3.9%
Manufacturing	2,328	2.9%
Construction	2,241	2.8%
Real Estate and Rental and Leasing	2,102	2.6%
Other Services (excluding Public Admin)	2,090	2.6%
Information	2,061	2.6%
Management of Companies and Enterprises	869	1.1%
Educational Services	738	0.9%
Arts, Entertainment, and Rec	443	0.6%
Public Administration	382	0.5%
Agriculture, Forestry, Fishing and Hunting	47	0.1%
Mining, Quarrying, and Oil and Gas Extraction	7	0.0%
Utilities	3	0.0%
Total	80,111	100%

(Source: US Census – OnTheMap))

Table 2-3: Local Monthly Income

Income	Percent
\$1,250 per month or less	19%
\$1,251 to \$3,333 per month	43%
More than \$3,333 per month	38%

(Source: US Census - OnTheMap)

2.2 Plan Document Review

A review assessment of the City of Doral Comprehensive Plan and Development Ordinance was conducted to identify goals/intent, and important policies and regulations that should be accounted for in the development of the Housing Master Plan. **Table 2-4** provides an overview and identifies key workforce housing implications for the Comprehensive Plan pertaining to the Housing and Future Land Use Elements, and the Development Ordinance pertaining to workforce housing, accessory uses and structures, and required off-street parking.

Table 2-4: Plan Document Review

Existing Planning Documents	Plan/Study Overview	Key Workforce Housing Implications
<p>Doral Comprehensive Plan Update – Housing Element (Updated 2016)</p>	<ul style="list-style-type: none"> Provide updated housing-related information for the Goals, Objectives and Policies of the Housing Element. 	<p><u>Workforce Housing (Data, Inventory, and Analysis)</u></p> <ul style="list-style-type: none"> Defined as housing affordable to families and persons making between 65% and 140% of median family income According to the Census the median family income is estimated to be \$49,900. Thus, using the income percentage range above, workforce housing in Doral should be affordable to families with income between \$32,400 and \$69,900. One important method to encourage the construction of workforce housing is with the selected use of density bonuses to developers on parcels with high density residential or mixed use land use and zoning <ul style="list-style-type: none"> Density bonus of 30% should be considered with the developer required to provide 2/3 of the bonus units on site as workforce housing if the bonus is approved by the City Council. In addition, the workforce units should be affordable across the full range of family incomes in the 65-140% AMI range. Help facilitate the provision of affordable and workforce housing options by allowing creative and innovative housing options for smaller families and single persons such as: <ul style="list-style-type: none"> Live-work units in mixed use areas Single-room occupancy as part of development mix Accessory apartments Reduced minimum residential floor area regulations Expansion of density bonus program Expedited permitting Reduced permit fees

Table 2-4: Plan Document Review (continue)

Existing Planning Documents	Plan/Study Overview	Key Workforce Housing Implications
<p>Doral Comprehensive Plan Update – Housing Element (Updated 2016) <i>(continue)</i></p>		<p><u>Goals, Objectives, and Policies</u></p> <ul style="list-style-type: none"> • The goal of the Housing Element is to provide a wide-range of housing options and prices that meet the needs of present and future residents and workers of the City of Doral. • Several objectives and policies to implement workforce housing. <ul style="list-style-type: none"> ○ Well-distributed housing inventory and a variety of residential densities (<i>Objective 4.1</i>) <ul style="list-style-type: none"> ▪ Workforce housing density bonus of up to 30% of total units for the provision of at least two-thirds (2/3) of the approved bonus units as workforce housing (<i>Policy 4.1.3</i>) ○ Eliminate substandard housing and stabilize and improve existing neighborhoods (<i>Objective 4.2</i>) <ul style="list-style-type: none"> ▪ Increase and improve the affordable housing supply, including workforce housing, through revitalization of existing neighborhoods (<i>Policy 4.2.2</i>) ○ Ensure affordable housing opportunities, including workforce housing (<i>Objective 4.3</i>) <ul style="list-style-type: none"> ▪ Actively participate with Miami-Dade County and not-for-profit organizations in providing affordable and workforce housing programs and development (<i>Policy 4.3.3</i>) ▪ By March 2018, develop regulations that require a certain percentage of units of new development or redevelopment - awarding density bonuses for the provision of affordable and/or workforce housing (<i>Policy 4.3.5</i>) ▪ Ensure adequate sewer and water service to support higher density affordable/workforce housing opportunities (<i>Policy 4.3.6</i>)

Table 2-4: Plan Document Review (continue)

Existing Planning Documents	Plan/Study Overview	Key Workforce Housing Implications
<p>Doral Comprehensive Plan Update – Housing Element (Updated 2016) <i>(continue)</i></p>		<ul style="list-style-type: none"> ▪ By July 2017, develop incentives for affordable/workforce housing projects, such as density bonuses, expedited permitting, and reduced permit fees <i>(Policy 4.3.7)</i> ▪ By January 2018, work with Miami-Dade Transit and local developers to establish a private shuttle-bus program to provide service between workforce areas outside the City and the Metrorail station, transportation hubs and major employment areas within the City, including downtown <i>(Policy 4.3.8)</i> ▪ By July 2017, consider additional incentives for affordable /workforce housing projects near transit and employment centers - density incentives, zoning overlays and reduced permit fees <i>(Policy 4.3.9)</i> ○ Intergovernmental coordination to affordable housing opportunities within the region <i>(Objective 4.4)</i> <ul style="list-style-type: none"> ▪ Coordinate with Miami-Dade County and the South Florida Regional Council to investigate opportunities for affordable/workforce housing options <i>(Policy 4.4.2)</i> ▪ Coordinate with the South Florida Regional Council, the Miami-Dade County Department of Housing and Community Development, and appropriate federal and state agencies to identify additional resources for affordable/workforce housing needs <i>(Policy 4.4.3)</i> ▪ Participate in a regional tracking system to identify affordable and workforce housing supply and sites <i>(Policy 4.4.4)</i> ▪ The City will continue to work with the South Florida Regional Council on developing affordable and workforce housing strategies <i>(Policy 4.4.5)</i>

Table 2-4: Plan Document Review (continue)

Existing Planning Documents	Plan/Study Overview	Key Workforce Housing Implications
Doral Comprehensive Plan Update – Housing Element (Updated 2016) <i>(continue)</i>		<ul style="list-style-type: none"> ○ Decrease the cost and increase the efficiency for private developers seeking to provide affordable housing (<i>Objective 4.5</i>) <ul style="list-style-type: none"> ▪ Streamline the permitting process, and waiving or reducing fees for private sector development with a substantial affordable/workforce housing component (<i>Policy 4.5.1</i>) ▪ Provide technical assistance and referral services to private sector representatives that are interested in providing affordable/workforce housing (<i>Policy 4.5.2</i>) ▪ Seek opportunities to create partnerships with private sector developers and not-for-profit organizations to increase the availability of affordable/workforce housing (<i>Policy 4.5.3</i>)
Doral Comprehensive Plan Update – Future Land Use Element (Updated 2016)	<ul style="list-style-type: none"> ● Provide updated future land use related information for the Goals, Objectives and Policies of the Housing Element. 	<p><u>Goals, Objectives, and Policies</u></p> <ul style="list-style-type: none"> ● The goal of the Future Land Use Element is to provide a visionary blueprint to effectively guide in the shaping of Doral into the premier place to live, work and play in Southeast Florida. ● Two future mixed-use categories provide for workforce housing density bonus - Downtown Mixed Use (DMU) and Community Mixed Use (CMU): <ul style="list-style-type: none"> ○ A workforce housing density bonus of up to 30% of total units may be granted by the City Council for the provision of at least two-thirds (2/3) of the approved bonus units as workforce housing (<i>Policy 2.1.2</i>)

Table 2-4: Plan Document Review (continue)

Existing Planning Documents	Plan/Study Overview	Key Workforce Housing Implications
<p>Doral Code of Ordinances - Workforce Housing (Sec. 74-886 to 74-893)</p>	<ul style="list-style-type: none"> Provide a Workforce Housing Density Bonus (WHDB) to property owners with land located in certain land use categories for the planning and construction of housing affordable to workers in the City of Doral. 	<ul style="list-style-type: none"> Eligible workforce household with an annual income in the workforce affordability range between 65 percent and 140 percent of the applicable Area Median Income (AMI) figure. WHDB is a bonus provision provided in selected land use categories contained in the city’s adopted comprehensive plan in terms of an additional housing density bonus percentage of up to 30 percent above the maximum number of dwelling units allowed in the land use category, including Creative Excellence density bonus, in return for the provision of two-thirds of the bonus units to be affordable to area workforce households. Workforce housing rates: <ul style="list-style-type: none"> One-third of the units must be affordable to workforce households making an annual income equal to 65 percent to 90 percent of AMI. One-third affordable to workforce households making 91 percent to 115 percent of AMI. One-third affordable to workforce households making 116 percent to 140 percent of AMI. Application process: <ul style="list-style-type: none"> Submit a WHDB zoning application If approved by city council, the property owner must submit for site plan review and approval, and addition detail information about the workforce units. City council shall utilize the standards below in determining the level of WHDB to award to a prospective development. <ul style="list-style-type: none"> Served by high-frequency public transit with a transit shelter within ¼ mile on the same side of the road. Within ½ mile of a major commercial or light industrial employment center.

Table 2-4: Plan Document Review (continue)

Existing Planning Documents	Plan/Study Overview	Key Workforce Housing Implications
<p>Doral Code of Ordinances - Workforce Housing (Sec. 74-886 to 74-893) (continue)</p>		<ul style="list-style-type: none"> ▪ There are designated safe routes to nearby schools, parks and other community facilities. ▪ Compatible with adjacent existing and planned development. ▪ Roadway, parks, schools and infrastructure can accommodate the additional density. • WHDB unit criteria includes location, quality of construction, number of bedrooms proportional to market-rate units, phasing shall be proportionately and concurrently with the market-rate units, similar exterior and interior finishes as the market-rate units. • Applicant shall enter into a WHDB agreement with the city. • Maintenance of rent affordability <ul style="list-style-type: none"> ○ City to make available copies of updated AMI ranges ○ Rental rates for workforce units to be controlled for 20 years ○ Workforce unit owners are required to submit documentation each year verifying income • Violation clauses
<p>Doral Code of Ordinances - Accessory Uses and Structures (Sec. 74-23 to 74-26)</p>	<ul style="list-style-type: none"> • Provide regulations for specific accessory uses and structures. 	<ul style="list-style-type: none"> • Accessory uses and structures shall contribute to the comfort, convenience or necessity of users of such principal use, which does not allow rental of accessory structures (i.e., garage apartments) to an individuals or families. • Recommend revision to allow secondary users of accessory structures in specific zoning districts as rental dwelling units to provide affordable/workforce housing.

Table 2-4: Plan Document Review (continue)

Existing Planning Documents	Plan/Study Overview	Key Workforce Housing Implications
<p>Doral Code of Ordinances - Required Off-Street Parking Spaces (Sec. 77-139 to 77-140)</p>	<ul style="list-style-type: none"> Provide regulations for required off-street parking. 	<ul style="list-style-type: none"> Single-family detached - 1, 2 and 3 bedrooms: 2 spaces per unit; 4+ bedrooms: 3 spaces per unit. Multi-family - 1 and 2 bedrooms: 2 spaces per unit. If located in the District Core 1 bedroom: 1 space per unit. 2 or more bedrooms: 2 spaces per unit; 3 or more bedrooms: 3 spaces per unit. District Core Live-Work - 1 bedroom: 2 spaces per unit, 2 or more bedrooms: 3 spaces per unit. If on-street parking is not permitted or is restricted on the unit's street frontage, then one visitor parking shall be required. The visitor parking shall be located 100 feet from the unit's street frontage. Administrative adjustments to parking spaces include reduction for mixed or joint use of parking spaces and reduction to achieve compliance with other code requirements for existing developments. Recommend revision to reduce parking spaces for workforce housing.

2.3 Transportation System

The assessment of the transportation and circulation system includes a review of the traffic conditions, bicycle and pedestrian network, and public transit to improve multimodal connections from residential uses to mixed-use and employment centers, and accommodate future growth.

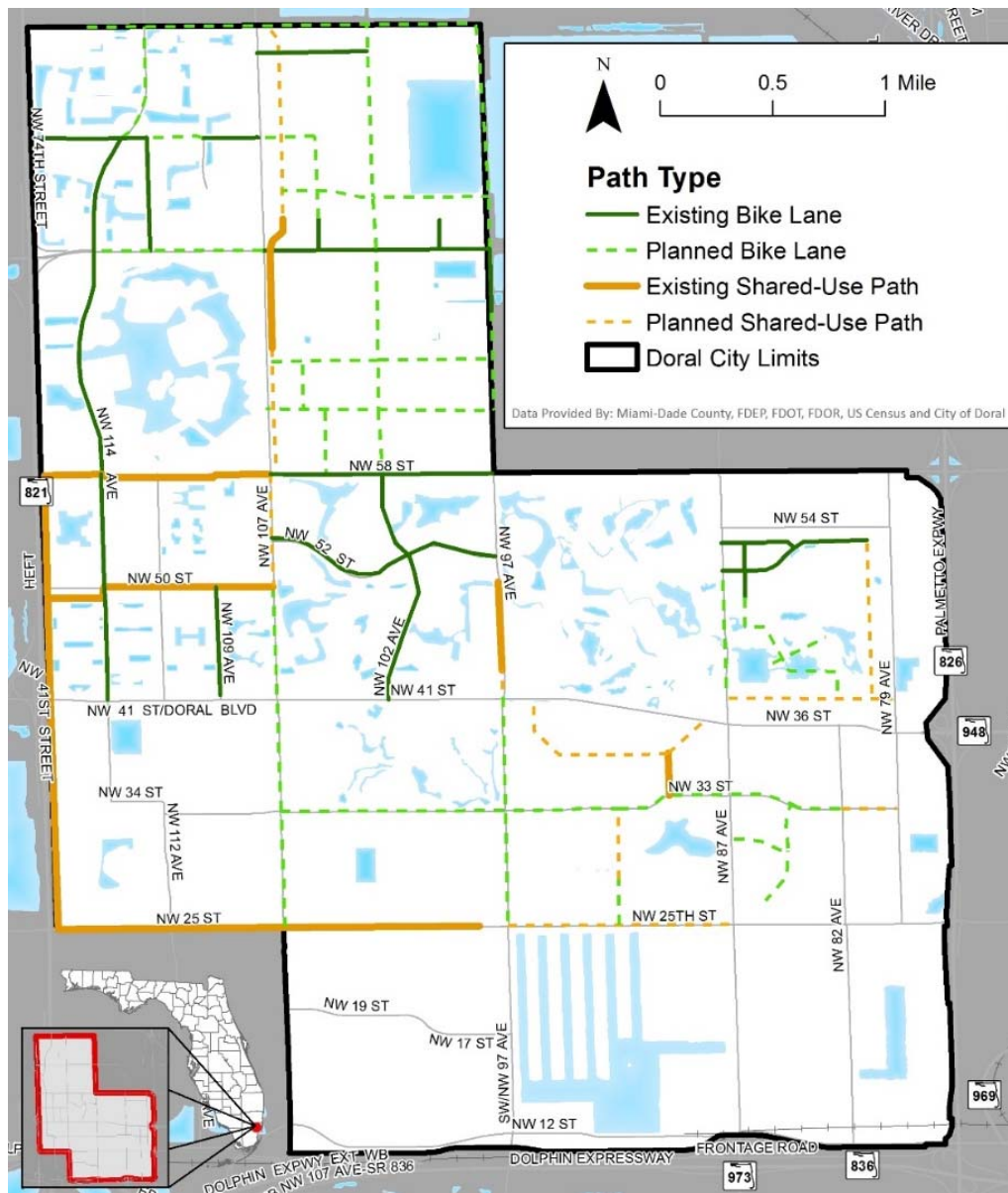
2.3.1 Traffic Condition

The major roadways within the City of Doral are constructed in a grid pattern, providing easy east/west and north/south connections. However, most of the arterial roads are heavily used with an annual average daily traffic of 15,000 to 50,000 cars, with the most congested areas along NW 41 Street, NW 25 Street, and NW 87 Avenue, which are in the vicinity of the employment centers. In addition, the arterial roadways connecting residential uses to the north of the city along NW 107 Avenue, NW 58 Street, and NW 74 Street are also heavily congested, as residents travel to and from work (**Map 2-5**).

2.3.2 Bicycle and Pedestrian System

The existing bicycle and pedestrian network within Doral is concentrated in the western portion of the city, though there are several existing shared-use paths located to the south. Connectivity exists primarily along major corridors with planned improvements in the north and east which would utilize less traveled roadways. Increased shared-use path connectivity is needed in the more residential northern portion of the city and connect to the employment centers to the south. Currently this north-south connection only exists along the western perimeter of the city (**Map 2-6**).

Map 2-6: Bicycle and Pedestrian System

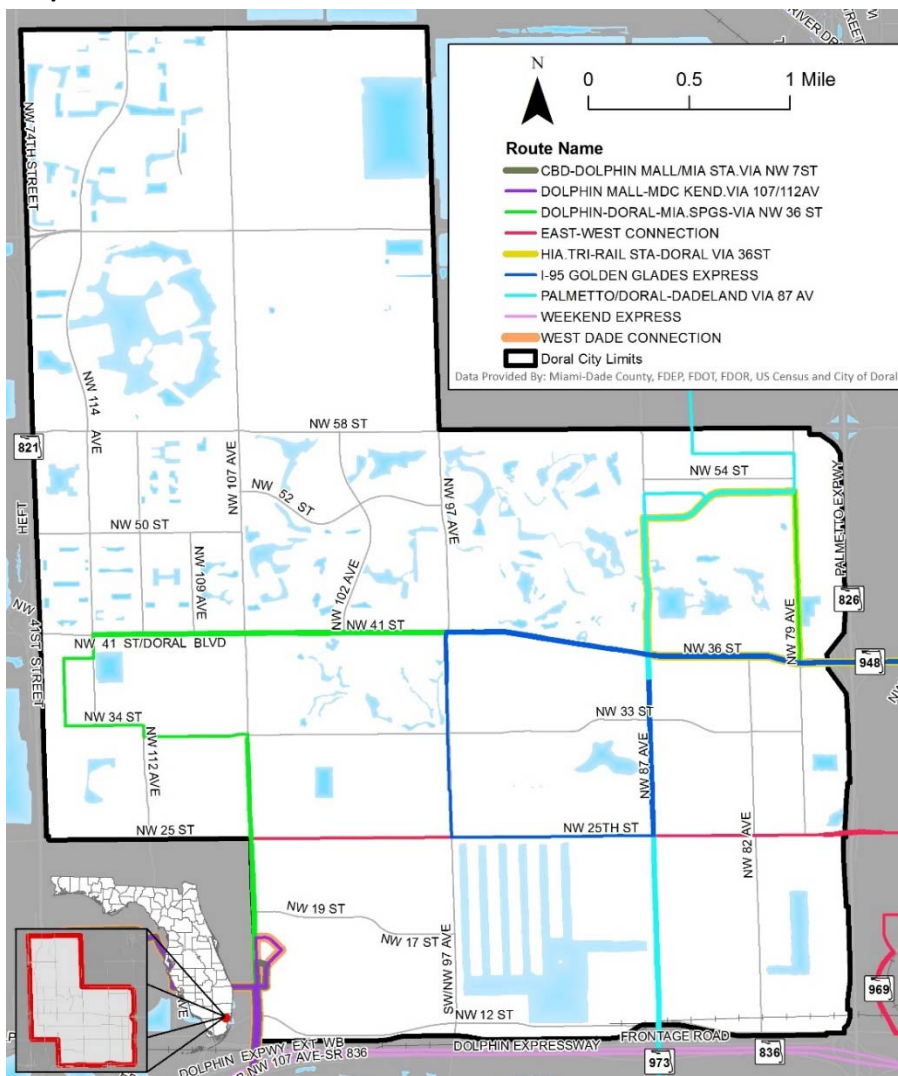


(Source: City of Doral)

2.3.3 Public Transportation

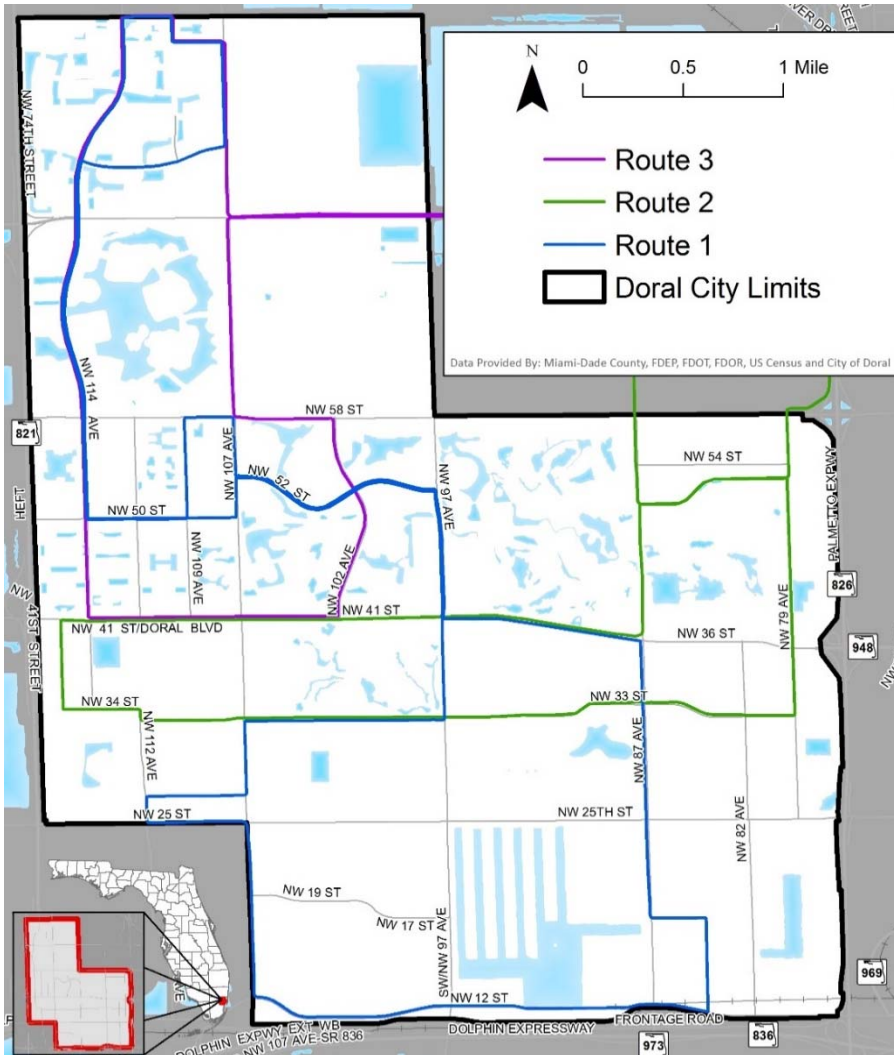
The transit system within Doral consists of Miami-Dade Transit (MDT) bus routes and the Doral Trolley, which is funded by the City (**Map 2-7** and **2-8**). The MDT system is located within the southern commercial area of the city with several routes only entering near the Miami International Mall in the southwest corner of the city. Doral represents the western most terminus of many routes and does not provide easy access to the residential areas in the north of the city. The Doral Trolley which covers more of the city than the MDT system does, provides connectivity between the residential areas in the north to commercial centers in the south. Major corridors such as NW 41st St and NW 33rd St contain multiple routes and offer east-west connectivity within the city.

Map 2-7: Miami-Dade Transit Routes



(Source: Miami-Dade Transit)

Map 2-8: Doral Trolley Routes



(Source: City of Doral)

The routes and headways are summarized in **Table 2-5**. The majority of the headways are between 20 to 30 minutes during the weekdays, except for Miami-Dade bus route 238, 132, and 87, which have headways between 50 to 60 minutes during the weekdays. These routes should have a headway of at least 30 minutes during the weekdays to be more convenient for riders to commute to and from work.

Table 2-5: Route/Headway Summary

Miami-Dade Transit	City of Doral Trolley
<p>Miami-Dade Transit operates 9 routes that serve the City of Doral. These routes operate both Northbound/Southbound and Eastbound/Westbound routes ensuring at least 2 busses per route.</p> <p>Route 7 (CBD - Dolphin Mall/Miami Station): This route enters Doral at the Dolphin Mall near the southwest corner of the City, running from 5:00 AM to 11:00 PM with approximately 20 minute headways Monday through Friday. On Saturday, Route 7 runs from 6:00 AM to 10:30 PM with approximately 40 minute headways. On Sunday, Route 7 runs from 6:30 AM to 10 PM with approximately 40 minute headways.</p> <p>Route 36 (Dolphin-Doral-MIA): This route cuts across the middle of the City along NW 41st St connecting the Dolphin Mall and Miami International Airport. Monday through Friday, Route 36 runs from 5:30 AM to 10:00 PM with a range of headway times from 1 hour to 20 minutes. Saturday, Route 36 runs from 6:00 AM to 9:00 PM with approximately 40 minute headways and service terminating at NW 53 St and NW 84 St instead of the Dolphin Mall. Sunday, Route 36 runs from 6:00 AM to 8:30 PM with approximately 30 minute headways.</p> <p>Route 71 (Dolphin Mall-MDC Kendall): This route enters Doral at the Dolphin Mall near the southwest corner of the City, running from 6:30 AM to 8:30 PM with approximately 30 minute headways Monday through Friday. On Saturday, Route 71 runs from 7:00 AM to 6:00 PM with 1 hour headways. On Sunday, Route 71 runs from 9:30 AM to 6:30 PM with 1 hour headways.</p> <p>Route 238 (East-West Connection): The 238 route runs east and west along NW 25th St and connects Doral to Miami International Airport. Route 238 runs from 7:00 AM to 8:15 PM with approximately 1 hour headways, Monday through Friday only.</p>	<p>The Doral Trolley operates both a northbound and southbound schedule with Route 1 running on weekends and weekdays. Route 2 operates Monday through Friday only with Route 3 operating Monday through Saturday.</p> <p>Route 1 (Crosstown Connector): Weekdays – 4 Busses, 6:00 AM to 9:30 PM with approximately 20 minute headways.</p> <p style="padding-left: 40px;">Saturday – 2 Busses, 7:00 AM to 7:30 PM with approximately 30 minute headways.</p> <p style="padding-left: 40px;">Sunday – 1 Bus, 7:30 AM to 7:00 PM with approximately 1 hour headways.</p> <p>Route 2 (Commercial – Metrorail Connector): 2 Busses 6:00 AM to 8:00 PM with approximately 30 minute headways.</p> <p>Route 3 (Residential – Metrorail Connector): 2 Busses 6:00 AM to 9:00 PM with approximately 30 minute headways.</p>

Table 2-5: Route/Headway Summary (continue)

Miami-Dade Transit	
<p>Route 132 (HIA, Tri-Rail, Doral): Route 132 is the Doral/Tri-Rail shuttle which enters Doral at NW 36 St and loops around NW 87 Ave and NW 79 Ave to return to NW 36th St and continue on to the Hialeah Market Tri-Rail station. Route 132 runs Monday through Friday only from 7:00 AM to approximately 6:15 PM with approximately 1 hour headways.</p> <p>Route 95 (I-95 Golden Glades Express): Route 95 is a weekday rush hour route that connects the NW 25th and NW 41st Block between NW 97 Ave and NW 87 Ave in Doral to points east. The route services Doral once per day between 7:00 AM and 7:30 AM and returns to the same area between 5:00 PM and 5:30 PM.</p> <p>Route 87 (Palmetto/Doral-Dadeland): Route 87 is a north/south connection that runs primarily along NW 87 Ave connecting Doral to both the Palmetto and Dadeland North Metrorail stations. Monday through Friday, Route 87 runs from 5:00 AM until 9:30 PM. Saturday, Route 87 services between Dadeland North Station and NW 53 St/NW 84 Ave only and from approximately 9:00 AM until 7:30 PM with approximately 50 minute headways. On Sundays, Route 87 services between Dadeland North Station and NW 53 St/NW 84 Ave only beginning at approximately 9:00 AM and ending at 7:30 PM with 1 hour headways.</p> <p>Route 338 (Weekend Express): While Route 338 doesn't enter the City of Doral, it does run adjacent to its southern boundary and has a terminus at the Dolphin Mall near the southwest corner of the City. The route connects Dolphin Mall with the MIA Metrorail Station and only operates on Saturday and Sunday. The service begins at 11:30 AM and ends at 7:50 PM with a 1 hour headway on both Saturday and Sunday.</p> <p>Route 137 (West Dade Connection): Route 137 is a connection between Miami International Mall and the South Dade Government Center to the south of Doral. Route 137 operates from 5:30 AM until 9:30 PM with headways ranging from 30 minutes to 1 hour, Monday through Friday. The Saturday and Sunday routes begin at 5:30 AM and runs approximately until 10:00 PM with headways ranging from 30 minutes to just over 1 hour.</p>	

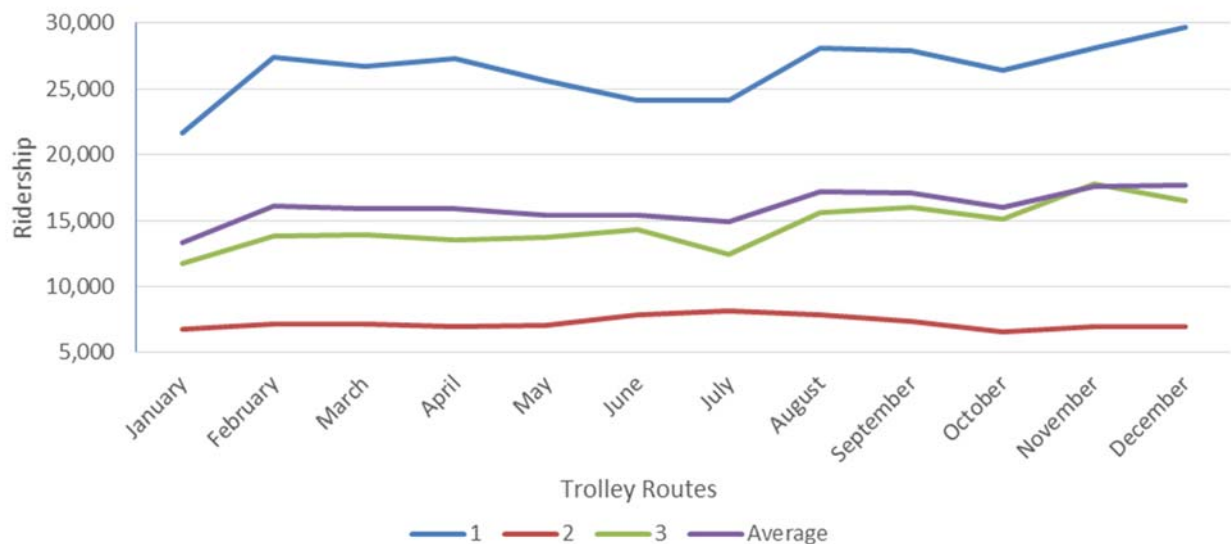
The Doral Trolley ridership for 2016 showed a steady increase from January to December with some fluctuations during the middle of the year (Table 2-6 and Figure 2-2). Route 1 had the highest ridership throughout the year, as this route connects the multi-family residential neighborhoods in the north to the commercial and industrial uses in the south of the city. Route 2 had the lowest ridership throughout the year, as this route provides a loop near the center of the city connecting more of the office uses.

Table 2-6: Doral Trolley Ridership - 2016

Routes	Jan.	Feb.	Mar	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.
1	21,716	27,356	26,728	27,288	25,599	24,136	24,166	28,104	27,908	26,446	28,047	29,709
2	6,741	7,166	7,141	6,920	7,091	7,823	8,188	7,851	7,386	6,595	6,950	6,947
3	11,771	13,858	14,009	13,551	13,732	14,365	12,492	15,628	16,019	15,113	17,827	16,499
Average	13,409	16,127	15,959	15,920	15,474	15,441	14,949	17,194	17,104	16,051	17,608	17,718

(Source: City of Doral)

Figure 2-2: Doral Trolley Ridership - 2016



(Source: City of Doral)

2.4 Land Use and Housing

The City of Doral’s existing land use, zoning, future land use, and housing stock characteristics were assessed to reach a reasonable understanding of the existing and future development pattern and housing stock, and the development pressures and land use needs for workforce housing in the city. Providing workforce housing is important because it provides a basic need to individuals and families,

generates economic development, attracts and retains essential workers, reduces traffic congestion, and creates a sense of place and pride.

2.4.1 Existing Land Use

As discussed briefly within the existing population density section, Doral can be divided into north and south along NW 41st Street with the north being comprised primarily of residential uses, mostly low density multi-family and the south being primarily commercial and industrial uses (**Table 2-7** and **Map 2-9**). There are industrial and residential uses located in the north and south respectively, and commercial uses are concentrated at the major intersections. Industrial is one of the two largest existing land uses in acreage (the other is residential) which partly explains the worker migration pattern seen in **Map 2-3**. The central portion of the city consists of both public and private golf courses which create pockets of residential nestled between the green spaces. The largest single commercial development is located in the southwest of the city which is anchored by the Miami International Mall and adjacent to the Dolphin Expressway.

Table 2-7: Existing Land Use

Land Use	2015 Acres
Residential:	
Single-family (up to 6 units/acre)	809
Low-Medium density (7 to 25 units/acre)	1,098
High-density (>25 units acre)	130
Sub-total	2,037
Non-residential:	
Shopping centers, commercial	551
Office	447
Hotels and motels	87
Communications, utilities, terminals	648
Industrial	1,617
Industrial Extraction	127
Institutional	270
Parks (including preserves & conservation)	986
Agriculture	176

2.4.2 Zoning

The existing zoning closely mimics the existing land use in that there are large amount of Multi-Family zoning districts located in the northern portion of the city, and Industrial, Industrial Commercial and Commercial districts to the south (**Table 2-8** and **Map 2-10**).

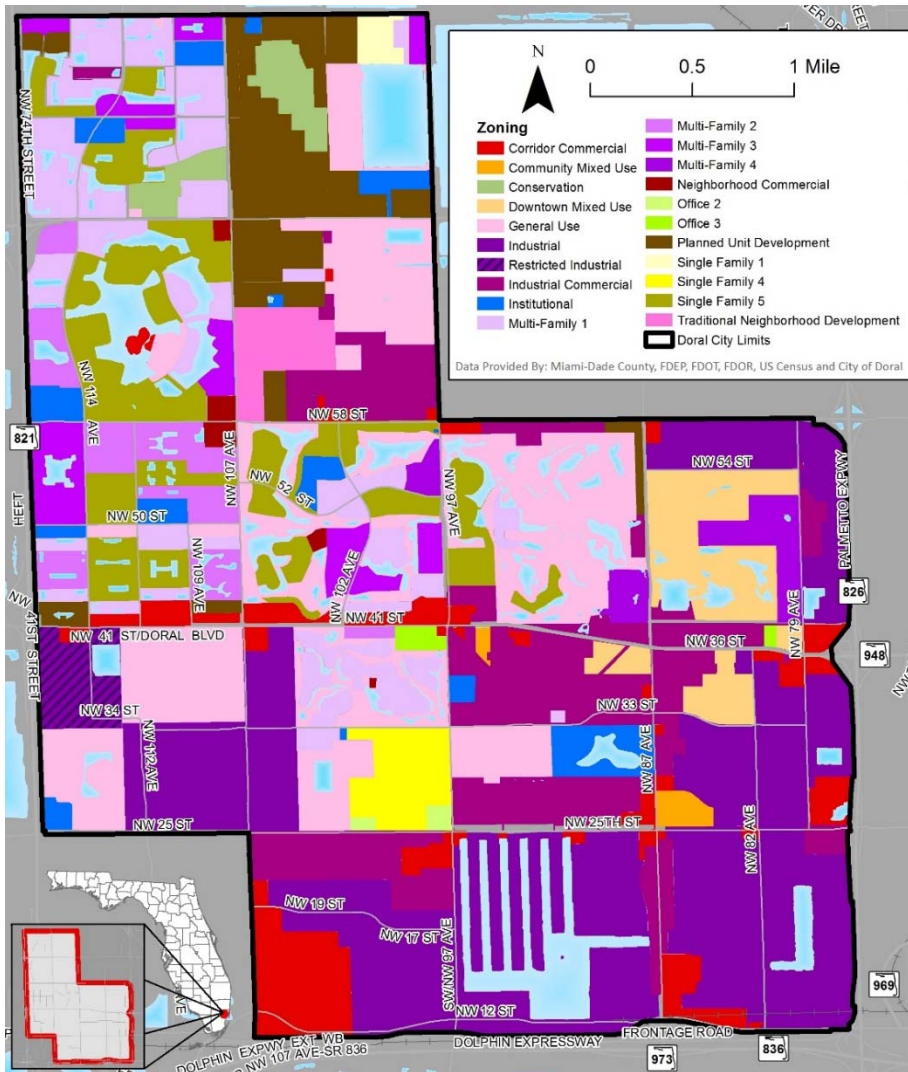
The Industrial and Industrial Commercial zoning districts permit residential uses up to a maximum of 20 units per acre if located within the District Core of the Doral Design District Plan which is bounded by NW 41 Street on the north, NW 25 Street on the south, NW 82nd Avenue on the west, and SR 826 (Palmetto Expressway) on the east. Residential units may consists of work/live, multi-family units and loft, but are limited by the district wide maximum of 5 units per gross are for any one single parcel (Policy 2.1.2). There are also two mixed-use zoning districts – Downtown Mixed-Use and Community Mixed-Use that permit a mix of uses, which may include, but is not limited to, commercial, residential, retail, office, and provide workforce housing density bonus, as determined by the Future Land Use (see **Future Land Use** section for additional information).

Table 2-8: Zoning

Zoning	Acres	% of City
Community Mixed Use	30.52	0.3%
Conservation Lands	49.34	0.5%
Corridor Commercial	506.66	5.3%
Downtown Mixed Use	357.61	3.7%
General Use	1,631.50	17.1%
Industrial	2,282.63	23.9%
Industrial Commercial	1,059.95	11.1%
Industrial-Restrictive	122.87	1.3%
Institutional, Public Facilities and Parks	255.81	2.7%
Multi-Family-1	826.56	8.6%
Multi-Family-2	287.58	3.0%
Multi-Family-3	269.56	2.8%
Multi-Family-4	145.00	1.5%
Neighborhood Commercial	38.55	0.4%
None	25.03	0.3%
Office-2	15.29	0.2%
Office-3	23.08	0.2%
Planned Unit Development	569.25	6.0%
Single Family-1	29.26	0.3%
Single Family-4	133.71	1.4%
Single Family-5	782.12	8.2%
Traditional Neighborhood Development	118.79	1.2%

(Source: City of Doral) Note: It is noted by the City that the Zoning and Future Land Use total acreage do not match due to GIS

Map 2-10: Zoning



(Source: City of Doral)

2.4.3 Future Land Use

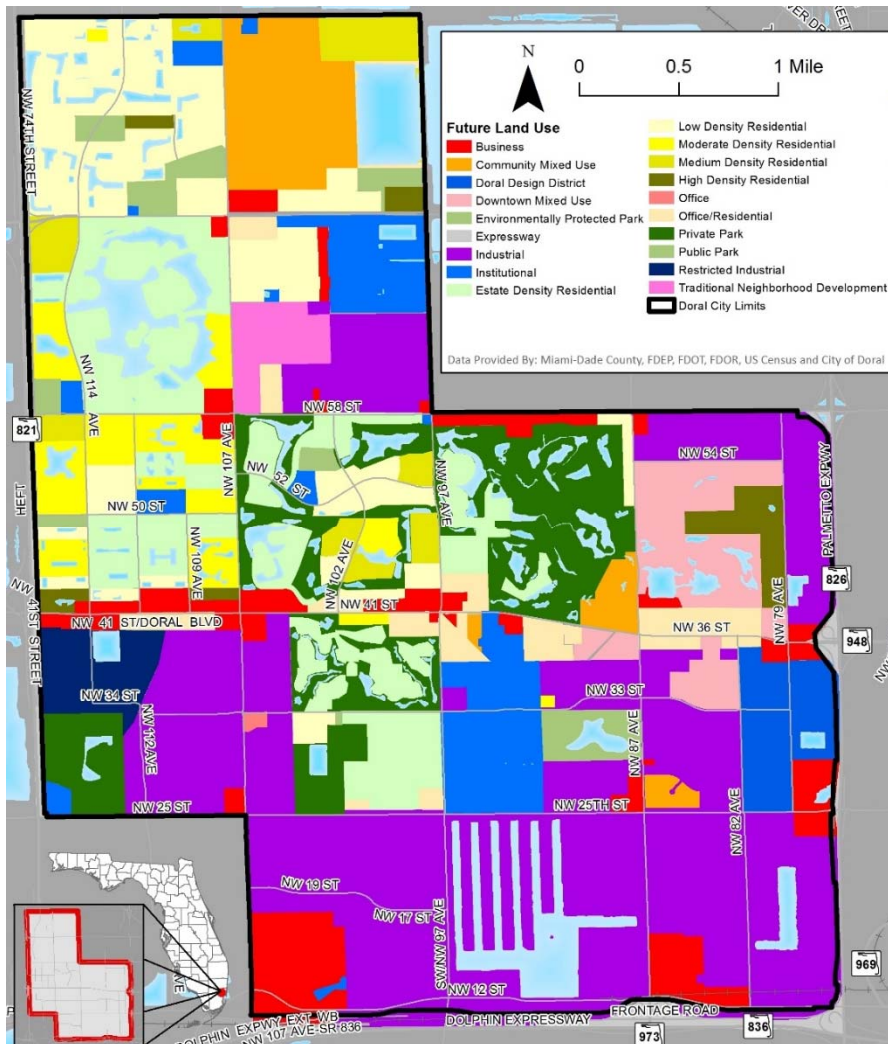
The trend of separating residential, industrial, and commercial spaces is set to continue as the future land use mimics what is seen today in the existing land uses. However, there are three future land use designations that allow a mix of residential close to the employment centers - Downtown Mixed-Use, Community Mixed-Use, and Office/Residential (Table 2-9 and Map 2-11).

Table 2-9: Future Land Use

Future Land Use	Acres	Percent of City
Business	604.27	6.15%
Community Mixed Use	412.67	4.20%
Doral Design District	204.31	2.08%
Downtown mixed Use	356.60	3.63%
Estate Density Residential	1,104.51	11.25%
Environmentally Protected Park	51.10	0.52%
Expressway	198.78	2.02%
High Density Residential	142.24	1.45%
Industrial	2,990.91	30.46%
Institutional	517.91	5.27%
Low Density Residential	884.99	9.01%
Medium Density Residential	252.20	2.57%
Moderate Density Residential	376.18	3.83%
Office	6.96	0.07%
Office/Residential	339.32	3.46%
Private Park	943.01	9.60%
Public Park	164.87	1.68%
Restricted Industrial	154.37	1.57%
Traditional Neighborhood Development	115.50	1.18%
Total Acres	9,820.69	

(Source: City of Doral) **Note:** It is noted by the City that the Zoning and Future Land Use total acreage do not match due to GIS inconsistencies

Map 2-11: Future Land Use



(Source: City of Doral)

The Downtown Mixed-Use (DMU) is limited to no more than 25 dwelling units per gross acre and maximum building height is eight (8) stories. Additional density up to 35 dwelling units per gross acre and height greater than 8 stories may be granted by the City Council for projects that exhibit creative excellence. The Community Mixed-Use (CMU) is limited to no more than 19 dwelling units per gross acre and maximum building height is 8 stories and additional density up to 25 dwelling units per gross acre and height up to 10 stories may be granted by the City Council for projects that exhibit creative excellence. Both Mixed-Use future land use designations provide a workforce housing density bonus of up to 30% of total units as granted by the City Council for the provision of at least two-thirds (2/3) of the approved bonus units as workforce housing.

The Office and Residential (OR) allows a mixture of both professional and clerical offices, hotels, motels and residential uses. The maximum density allowed is 16 units per gross residential acre. When residential uses are mixed with office uses, the overall scale and intensity shall be no greater than that which would be approved if the parcel was a parcel in either office only or residential use only, whichever is higher.

2.4.4 Existing Housing Stock Characteristics

The existing housing stock was assessed to better understand the housing characteristics of the City of Doral by reviewing the housing type, location, year built, just value and unit size, and recent sales.

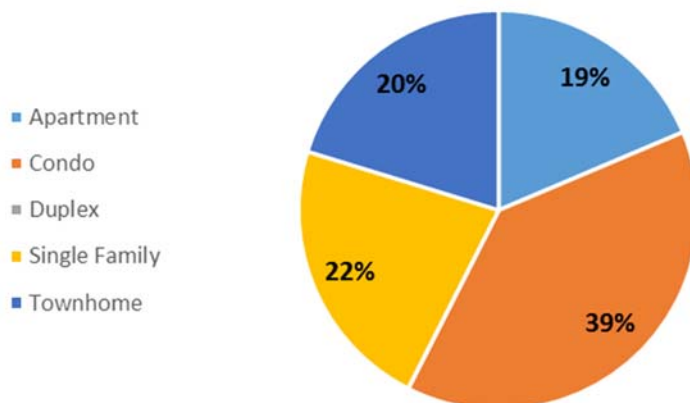
- a. **Housing Units by Type:** The City of Doral has a fairly good mix of housing types, although it has virtually no duplexes. **Table 2-10** breaks down the number of housing units by type, and **Figure 2-3** illustrates the percentage break-down of each type. Out of the 23,056 housing units in the Doral, the largest share is condos (39%). There are roughly equal amounts of apartments, single family homes, and townhomes (approximately 20%). This mix of housing can help accommodate a variety of household sizes and lifestyles, and can influence affordability given the different unit sizes.

Table 2-10: Housing Units by Type

Unit Type	Number of Units
Apartment	4,293
Condo	8,957
Duplex	6
Single Family	5,128
Townhome	4,672
Total	23,056

(Source: 2016 Florida Department of Revenue)

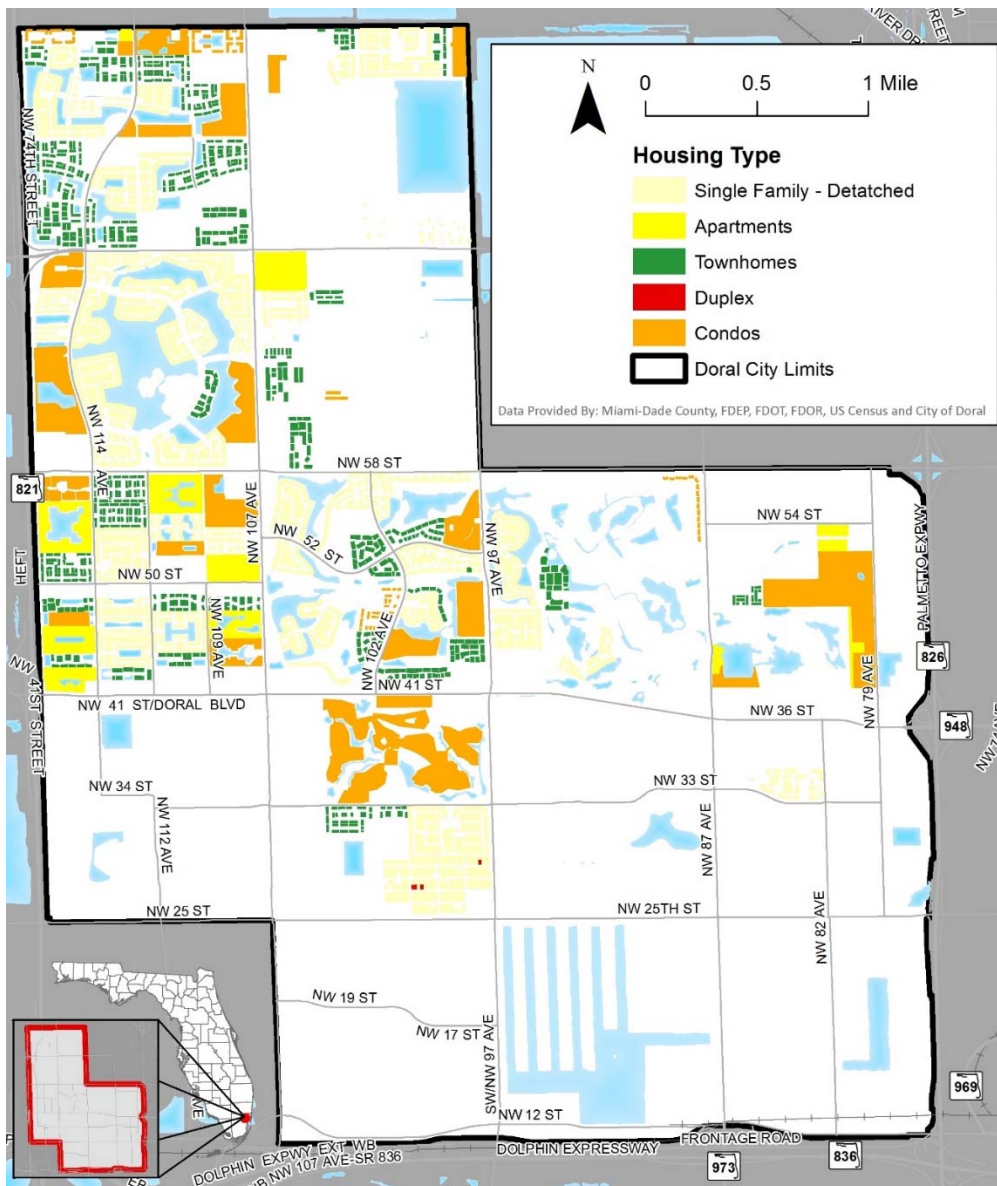
Figure 2-3: Percent of Housing Units



(Source: 2016 Florida Department of Revenue)

- b. **Housing by Location:** There are many areas of Doral, particularly north of NW41 Street/Doral Boulevard, where residents or prospective residents can find a variety of housing types. **Map 2-12** shows the location of housing by type, with apartments, condos, and townhomes in mixed clusters throughout the city. These are often also mixed with single-family homes, yet there are some sections of the city that are predominantly single-family homes. Most of the housing lies north of NW 41 St/Doral Blvd, yet in the northern most part of the city to the east, the housing thins out (**Figure 2-4**).

Map 2-12: Housing by Location



(Source: 2016 Florida Department of Revenue)

Figure 2-4: Examples of Existing Housing



NW 27 Terrace Avenue



NW 116 Avenue



NW 78 Terrace



NW 90 Street



NW 102 Avenue



NW 33 Street



NW 50 Street

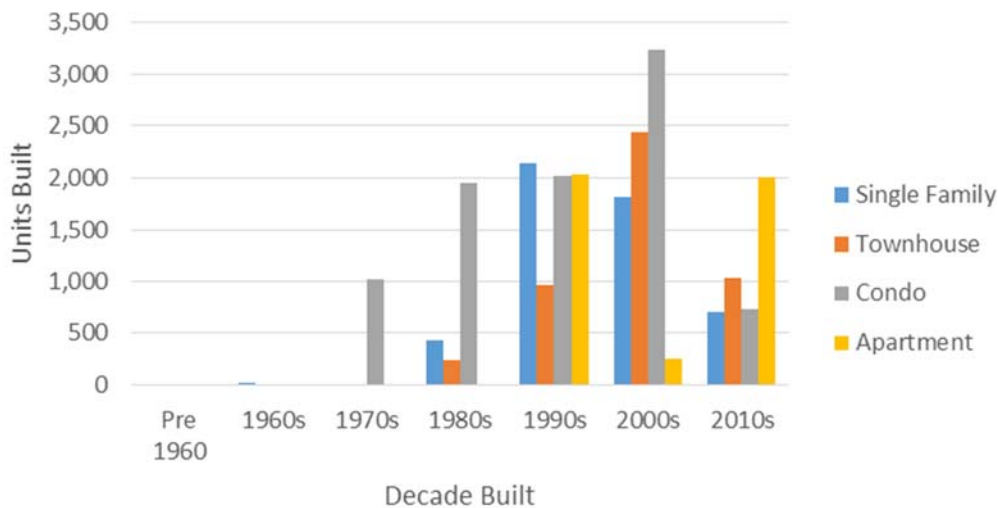
- c. **Housing Unit Types by Year Built:** Table 2-11 and Figure 2-5 show the number of units built by decade for different housing types. Much of the city’s housing stock was built in the 1990’s and 2000’s, making it overall relatively new. Having predominantly newer housing can influence affordability if housing is more expensive due to construction costs and changing unit sizes for new development.

Table 2-11: Housing Unit Built by Type

Year Built	Units				
	Single Family	Townhouse	Condo	Apartment	Duplex
Pre 1960	14	-	-	-	-
1960s	16	-	-	-	2
1970s	6	-	1,019	-	2
1980s	435	233	1,951	-	2
1990s	2,147	967	2,024	2,034	-
2000s	1,814	2,449	3,234	256	-
2010s	696	1,023	729	2,003	-
Total	5,128	4,672	8,957	4,293	6

(Source: 2016 Florida Department of Revenue)

Figure 2-5: Housing Unit Built by Type



(Source: 2016 Florida Department of Revenue)

d. **Existing Housing – Just Value and Unit Size Characteristics**

- i. *Unit Types and Just Value:* **Table 2-12** shows the median and average just values (based on property appraiser assessments) of different housing types. The average value of different housing types is higher than median values, except for apartments, indicating that there are some particularly high value units in the housing stock. Duplexes and single-family homes have the highest values, while condos and apartments have the lowest. Condos and apartments have sizably lower values than the other housing types. This finding indicates there is a fairly broad range of just value for units in the city.

Table 2-12: Just Values

Unit Type	Parcel Count	Median Value	Average Value
Single Family	5,128	\$426,112	\$474,476
Townhouse	4,672	\$296,150	\$311,675
Condo	8,957	185,880	\$186,627
Apartment	16	\$158,646	\$154,304
Duplex	3	\$403,810	\$426,814

(Source: 2016 Florida Department of Revenue)

- ii. *Trends in Unit Sizes and Just Value:* Housing value increases over time have tracked somewhat consistently with unit size increases in the case of single-family homes, but not very closely in the case of townhomes and condos. This finding indicates that other factors are also having important effects on housing values, which affect housing affordability. **Table 2-13** shows the average size of units by decade for three different housing types, and **Table 2-14** shows the median just value of these housing types by decade when the units were built. Single-family home size has nearly doubled since 1960, with corresponding median just value increasing nearly 40% (note that the 1960 median just value may also have been affected by the small number of units at that time). Townhouses and condos have seen some smaller increases in size between units first built in the 1970’s and 80’s and the 2010’s, but both housing types have seen large increases in values (nearly \$100,000 increase when initial values were \$272,350 for townhouses and \$123,660 for condos).

Table 2-13: Mean Size of Housing Units

Year Built	Single Family (sq.ft.)	Townhouse (sq.ft.)	Condominium (sq.ft.)
Pre 1960	1,647	-	-
1960s	2,049	-	-
1970s	2,197	-	1,092
1980s	2,120	1,910	1,146
1990s	2,442	1,729	1,178
2000s	2,614	1,905	1,312
2010s	3,007	2,022	1,277

(Source: 2016 Florida Department of Revenue)

Table 2-14: Median Just Value

Year Built	Single Family	Townhouse	Condominium
Pre 1960	\$309,475	-	-
1960s	\$345,600	-	-
1970s	\$326,593	-	\$123,660
1980s	\$312,373	\$272,350	\$139,272
1990s	\$418,665	\$277,630	\$181,740
2000s	\$414,897	\$283,420	\$201,470
2010s	\$507,293	\$364,080	\$214,710

(Source: 2016 Florida Department of Revenue)

- e. **Recent Sales Data:** Between single family homes, condos, and townhomes, condos are currently by far the most affordable option. **Table 2-15** shows the mean and median recent sales data for the three housing types. The mean and median sales price for single-family homes and townhomes has decreased between 2015 and 2016, while the condo mean and median sales price remained relatively stable.

Table 2-15: Housing Sales

		Single Family	Condo	Townhome
2015	Median	\$558,700	\$225,000	\$406,400
	Mean	\$672,318	\$231,048	\$440,192
2016	Median	\$512,000	\$220,000	\$355,000
	Mean	\$584,226	\$250,688	\$389,779

(Source: 2016 Florida Department of Revenue)

2.4.5 Existing Supply and Workforce Housing Needs

The workforce housing demand based on availability and affordability of existing housing was assessed by analyzing both the current median household income of Doral as well as the AMI.

- a. **Burdened Households:** The City of Doral has a significant number of burdened households (burden meaning spending more than 30% of household income on housing), an indication of an affordability problem. **Table 2-16** shows the percentage of households (both purchase and rental units) burdened in Doral, certain comparable Florida jurisdictions, and Miami-Dade County as a whole. For the county comparison, it is important to note that NYU Furman indicated in its 2017 National Rental Housing Landscape that the Miami metro area in 2015 was the number one metro in terms of percentage of rent-burdened households (just over 55%), illustrating a relatively strong affordability problem. To put this in perspective, the report notes that slightly over 48% of renter households are burdened for metros across the U.S. (Workforce Housing Policy and Literature Review section for additional information). Thus, the county has a relatively high percentage of rent burden (62% versus 55% and 48%). Doral is experiencing mortgage burden at a similar rate to those of Miami-Dade County and rent burden at a slightly decreased rate relative to the county (but still higher than the Miami metro area and general metro percentages in the NYU Furman report). Moreover, when comparing Doral with other local jurisdictions comparable in size, demographics, and geographic location, Doral experiences a higher percentage of burdened households than the other jurisdictions except for Hialeah.

Table 2-16: Burdened Households

Jurisdiction	Mortgage Burdened Households	Rent Burdened Households
Doral	34%	57%
Hialeah	35%	68%
Coconut Creek	23%	53%
Coral Gables	25%	48%
Kendall CDP	28%	52%
Aventura	26%	55%
Miami-Dade County	33%	62%

(Source: 2015 American Community Survey)

Note: 30% or more of household income spent on housing = burdened.

- b. **Median Income and Housing Cost:** **Table 2-17** shows the number of units available (occupied and vacant), summarized by housing type, for incomes from 65% to 140% of the median household income. Availability is based on the number of units that fall at or below the just value of a home a household which a certain income could afford to purchase (estimated as 2.5 times the income). Single-family homes and townhomes have very few units available at 120% of AMI or below, which is important given that these housing types make up sizable shares of the housing stock (22% and 20%, respectively). Condos show a much more gradual reduction in availability from the bottom of this income range to the top, but there are still sizable differences (923 units available the lowest

income bracket versus 8,339). Overall, there are nearly 10 times more units available to the highest income bracket of this range than the lowest. Thus residents with lower incomes will have far fewer options for housing units.

Table 2-17: Median Income and Housing Cost- Based on Median Household Income

Median Income	JV Threshold ¹	Income Range	Units Available			
			Single Family	Townhome	Condominium	Total
\$47,406	\$118,516	65%	5	19	923	947
\$58,346	\$145,866	80%	5	19	2,137	2,161
\$72,933	\$182,333	100%	7	19	4,277	4,303
\$87,520	\$218,799	120%	17	99	6,602	6,718
\$102,106	\$255,266	140%	103	939	8,339	9,381

(Source: 2016 Florida Department of Revenue, 2015 American Community Survey)

Table 2-18 shows the same information but for AMI instead of the median household income. Since AMI lowers the just value thresholds corresponding to each income level, there are fewer available housing units available. There are very few single-family houses or townhomes available, regardless of income level. The number of available condos is also severely reduced, particularly at the 65% and 80% AMI levels. Overall, there are over 100 times more units available at higher income levels than at the lower income levels within the workforce housing range. These findings show that when measuring by AMI, residents at all workforce housing levels will have few options in terms of housing type and that residents with lower incomes will also have much more restricted options for units in general.

Table 2-18: AMI and Housing Cost- Based on Area Median Income

AMI	JV Threshold ¹	Income Range	Units Available			
			Single Family	Townhome	Condo	Total
\$33,670	\$84,175	65%	4	19	16	39
\$41,440	\$103,600	80%	5	19	79	103
\$51,800	\$129,500	100%	5	19	1,614	1,638
\$62,160	\$155,400	120%	5	19	2,603	2,627
\$72,520	\$181,300	140%	7	19	4,193	4,219

(Source: 2016 Florida Department of Revenue, 2015 American Community Survey)

Notes:

¹ The Just Value Threshold was calculated by multiplying both the Area Median Income (provided by HUD) and the Median Household Income (American Community Survey) by 2.5. A multiplier of 2.5 is typically considered a reasonable value for determining an affordable home. The values then were able to be compared to the just values of properties within Doral to determine the quantity of properties available at different price points.

2.4.6 Government Employee Salaries and Workforce Housing

This section includes a cursory assessment of salaries for employees of the City of Doral, Miami-Dade Fire Rescue, and Miami-Dade County Public Schools and how they relate to workforce housing standards.

- a. ***City of Doral Government Salaries:*** Employees making minimum or midpoint salaries in a majority of occupations at the City of Doral fall within the range for workforce housing (65-140% of AMI), while a lower, yet still sizable, share of occupations at the maximum salary have employees that fall within the range. Employees making the minimum salary (typically new employees) face a greater challenge since many starting salaries that do not fall in the workforce housing range fall below it. **Table 2-19** shows the share of minimum, midpoint, and maximum occupation salaries within each City department that fall in the workforce housing income range. Any occupations that were not a part of these shares either fall above or below the workforce housing income range. A vast majority of the starting or midpoint occupation salaries fall within the range when evaluated across all departments (74% and 69%, respectively). Additionally, 18% of starting salaries for occupations fall below the workforce housing income range (**Table 2-20**).

Table 2-19: Share of Occupation Salaries in Workforce Housing Income Range

Department	Total Occupation Count	Min Salary		Mid-Point Salary		Max Salary	
		Count in WFH Range	%	Count in WFH Range	%	Count in WFH Range	%
Building	25	18	72%	18	72%	8	32%
City Clerk	3	3	100%	3	100%	2	67%
City Manager	6	1	17%	3	50%	2	33%
City Manager/ Police	2	0	0%	2	100%	2	100%
Code	10	7	70%	7	70%	5	50%
Economic Development	3	3	100%	2	67%	0	0%
Finance	13	8	62%	9	69%	7	54%
HR	7	6	86%	5	71%	1	14%
IT	18	17	94%	8	44%	5	28%
Mayor & Council	3	3	100%	0	0%	0	0%
Parks & Recreation	21	16	76%	18	86%	14	67%
Planning & Zoning	10	8	80%	6	60%	2	20%
Police	30	20	67%	24	80%	15	50%
Police/ Finance	1	1	100%	1	100%	1	100%
Public Affairs	8	8	100%	7	88%	2	25%
Public Works	24	17	71%	14	58%	11	46%
Total	184	136	74%	127	69%	77	42%

(Source: City of Doral)

Table 2-20: City of Doral Occupation Minimum Salaries below Workforce Housing Income Range

Department	Total Occupation Count	Min Salary	
		Count below WFH Range	%
Building	25	6	24%
City Clerk	3	0	0%
City Manager	6	2	33%
City Manager/ Police	2	2	100%
Code	10	2	20%
Economic Development	3	0	0%
Finance	13	4	31%
HR	7	0	0%
IT	18	0	0%
Mayor & Council	3	0	0%
Parks & Recreation	21	4	19%
Planning & Zoning	10	1	10%
Police	30	6	20%
Police/ Finance	1	0	0%
Public Affairs	8	0	0%
Public Works	24	6	25%
Total	184	33	18%

(Source: City of Doral)

Table 2-21 shows the number of occupations by salary level and percentage of AMI (whether a salary falls at or below a certain point). A sizable number of occupations fall at or below the AMI level of income. In comparing this pattern with housing availability by income bracket, the 120% AMI point is where availability for single family homes and townhomes increase. So employees in a number of occupations will likely have trouble finding affordable units of these housing types, and may consequently be limited to multi-family housing or condominiums.

Table 2-21: AMI, City of Doral Salary

Occupations < AMI Salary			
AMI %	Min	Med	Max
65	33	2	0
80	59	33	6
100	101	59	33
120	145	101	59
140	169	129	77

(Source: U.S. Department of Housing and Urban Development, City of Doral)

- b. Miami-Dade Fire Rescue:** Minimum and midpoint salaries for most occupations of Miami-Dade Fire Rescue fall in the workforce housing range, and as salaries increase, they tend to increasingly exceed the workforce housing salary range. **Table 2-22** reviews minimum, midpoint, and maximum salaries for the Miami-Dade Fire Rescue occupations that have the highest number of employees. **Table 2-23** shows that four out of five occupations qualify for workforce housing, with the fifth exceeding the range. At the midpoint pay, three out of five occupations fall within the range, and at the maximum pay, only two qualify.

Table 2-22: Miami-Dade Fire Salaries for Top 5 Occupations

Occupation	Minimum	Mid-Point	Maximum
Firefighter	\$41,014	\$56,325	\$71,637
Fire Lieutenant	\$55,896	\$69,453	\$83,010
Fire Captain	\$65,763	\$80,801	\$95,839
Chief Fire Officer	\$79,537	\$97,064	\$114,591
Fire Rescue Dispatcher	\$39,306	\$52,261	\$65,216

(Source: Miami-Dade County)

Table 2-23: Salaries of Top 5 Fire Occupations Compared to Workforce Housing Income Range

Total Count	Min Salary		Mid-Point Salary		Max Salary	
	Count in WFH Range	%	Count in WFH Range	%	Count in WFH Range	%
5	4	80%	3	60%	2	40%

(Source: Miami-Dade County)

- c. Miami-Dade County Public Schools:** For Miami-Dade County teachers, an evaluation of salaries across all levels of experience and all corresponding salary levels from minimum to maximum (**Table 2-24**) indicates that all teachers generally fall within the range for workforce housing (given a workforce housing income range of \$33,670 to \$72,520).

Table 2-24: Miami-Dade County Public Schools Teacher Salaries

Years of Experience	Base Salary (with US Public Schools Experience)			Base Salary (with Non-Public School Experience)		
	Minimum	Midpoint	Maximum	Minimum	Midpoint	Maximum
0-5	\$40,800	\$41,412	\$42,024	\$40,800	\$41,208	\$41,616
6-11	\$42,636	\$43,248	\$43,860	\$42,024	\$42,432	\$42,840
12-17	\$44,472	\$45,084	\$45,696	\$43,248	\$43,656	\$44,064
18+	\$46,308	\$46,614	\$46,920	\$44,472	\$44,676	\$44,880
Overall	\$40,800	\$43,860	\$46,920	\$40,800	\$42,840	\$44,880

(Source: Miami-Dade County Public Schools)

3.0 Workforce Housing Policy and Literature Review

This section aims to put Doral’s housing affordability situation into context, providing information on housing affordability trends at the national, state, and metropolitan level. In addition, it summarizes the existing state legislation for Florida and the most effective strategies that jurisdictions around Florida are implementing to address housing affordability issues, which have become acute in many areas around the state.

3.1 National Context

The affordability of housing hinges on various factors, including the financial situation of residents, housing costs, and the interaction between these first two factors. The key findings on affordability from NYU Furman’s *2017 National Rental Housing Landscape* indicate that nearly half of renter households across metropolitan areas in the U.S. were rent-burdened (paying 30% or more of income on housing) in 2015. Additionally, the Joint Center for Housing Studies (JCHS) at Harvard University found in its *2017 State of the Nation’s Housing* report that when looking at U.S. metropolitan areas, nearly half of renters on average can afford a median-priced home in their metropolitan area, yet there is a wide variability among these areas.

The NYU Furman Center’s report indicates that since 2006, the overall number and share of renters has increased, with increases in virtually every metro area between 2012 and 2015. The income of a typical renter household has increased since 2012, but this increase is driven in part by the larger number of higher income households that are renting. Renters on the whole still tend to have lower incomes and less education than owner households. Regarding the financial circumstances of homeowners, the JCHS report notes that households have not fully rebounded from the housing crisis when accounting for inflation. In addition, larger shares of homeowners in low-income neighborhoods remain underwater on their mortgages, owing more than their houses are worth. The distinctions between higher and lower income households may gain additional significance, given the growth of income inequality documented in the JCHS report. For residents looking to buy a home, tightness of available credit can create a barrier.

The cost of housing is a second key factor in understanding housing affordability. The NYU Furman Center report that between 2012 and 2015, median rents increased in virtually every metro studied

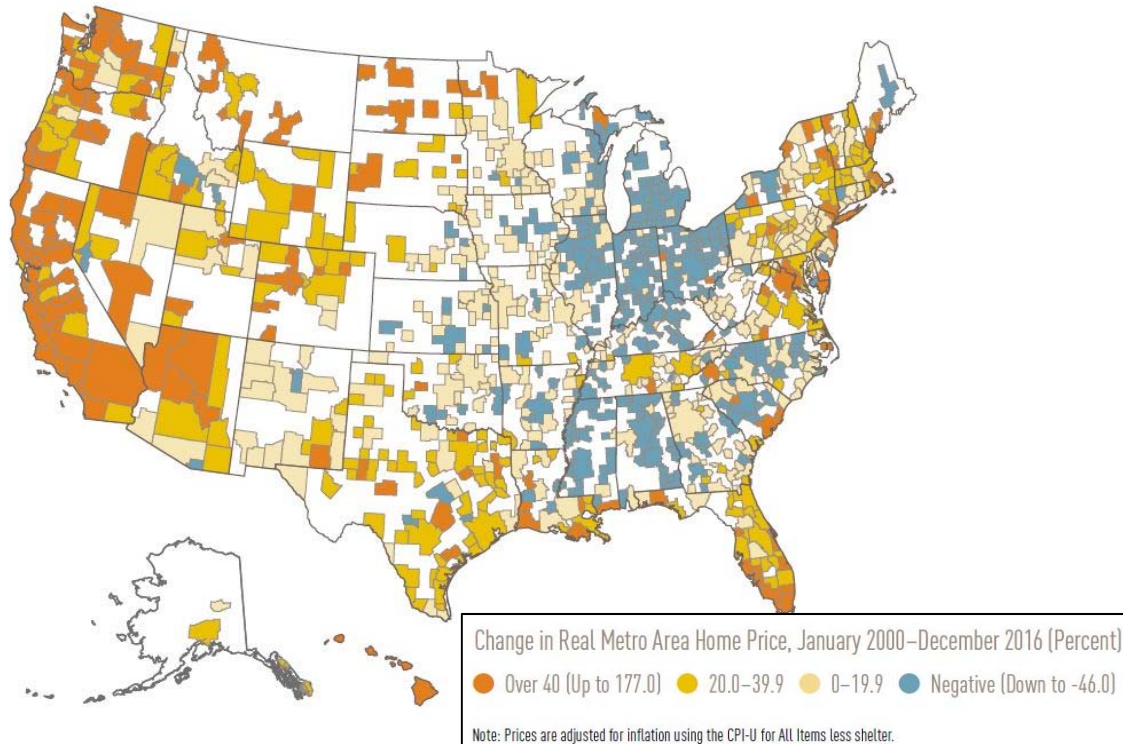
(even when accounting for inflation), especially in metros that had relatively high rents. This trend is important for the Miami area, since its median rent in 2015 was in the top ten of metro areas.

Collectively, the annualized rate of increase in the median rent was 1.9%. The report also compared median rents of recently available units (those rented within the previous 12 months) and median rents overall for two-bedroom units. Median rents for recently available units were 4.8% higher, indicating that if a household chose to relocate, it would likely face a rent increase (although some of the increase may be due to quality improvements of the housing). Regarding home prices, the JCHS report indicates that there has been variability by metro area as to whether prices have regained previous peaks; “32 metros are still down 15 percent or more” (p 1).

The JCHS report puts forth some drivers of cost for housing. For homes, there have been steady increases in demand, but a low rate of new construction, particularly in the lower priced end of the market with entry-level homes. Rental housing is also facing tight supply despite the increases in multifamily construction. Some underlying factors may be labor shortages and regulatory and financing requirements that raise development costs.

In looking at financial circumstances of residents together with housing prices, the issue of affordability becomes apparent. The NYU Furman Center report shows that in 2015, slightly over 48% of renter households were rent burdened (when a household spends more than 30% of pre-tax income on rent) and slightly more than 25% of renter households were severely rent burdened (when a household spends more than 50% of pre-tax income on rent). While there has been a dip in these shares of renters from 2010 to 2015, the share of renters experiencing these burdens has generally increased since 1960 (when rent burden share was 24.3% and severe rent burden share was 12.2%). For determining affordability of homeownership, the JCHS report notes the importance of how affordable homes prices are for renters. “On average, 45 percent of renters across the nation’s metropolitan areas can afford the payments on a median-priced home in their market area, but the shares range from less than one in ten in the high-cost markets concentrated on the Pacific Coast as well as in Florida and the Northeast, to two-thirds or more in low-cost metros in the Midwest and rural South” (p 4). **Map 3-1** illustrates how there has been a higher percent change increase in home prices for the Pacific Cost, Florida, and the Northeast relative to most other areas.

Map 3-1: Metro Area Home Prices Have Diverged Widely Since 2000



(Source: Joint Center for Housing Studies of Harvard University, *The State of the Nation's Housing, 2017*)

3.2 Florida Context

In a 2016 report entitled *Insufficient Affordable Housing Limits Florida's Economic Potential*, the Florida Policy Institute asserts that the state has an affordable housing crisis and presents several measures that illustrate the problem. According to the Institute, the share of Florida households paying more than 30% of their incomes for housing is 36%, with 18% paying more than 50% of their incomes. The Florida Housing Coalition in its 2017 *Home Matters* report puts the share of cost burdened households at 26%, with 15% severely cost-burdened. Looking specifically at low-income households (making 80% of the Area Median Income), 65% are cost burdened and 37% area severely cost burdened.

When looking at the problem in terms of hourly wages, the Florida Policy Institute indicates that a household would typically need to make \$19.95 per hour to pay fair market housing rent based on the statewide average, yet the statewide average wage is only \$14.49 per hour. The Florida Housing Coalition uses a "survival wage" standard from the United Way that would require two wage-earners to make \$13.71 each to support themselves and an infant and preschooler. While the Florida Housing Coalition notes that the median wage in Florida is \$15.76, it also states that 39% of all jobs in the state pay less than the survival wage. Additionally, some occupations in areas with higher housing prices are not necessarily compensated more in proportion to their increased housing costs than the same occupation in areas with lower housing prices. When transportation costs are combined with housing costs to assess burden (since households may commute to/from more affordable areas), areas in Florida

emerge as particularly expensive. **The Florida Housing Coalition notes that in 2012, Miami and Tampa ranked first and third, respectively, for the most expensive metro areas in the U.S. in terms of combined housing and transportation costs, according to the Center for Neighborhood Technology.**

A final way to illustrate the problem is through number of available, affordable units for various income levels. The Florida Policy Institute finds that only 23 such rentals are available for every 100 households at 30% of the Area Median Income or less (the Florida Housing Coalition finds that there are only 22 such units available for this income group). The fact that Florida ranks 49th in all states for affordable and available housing (Florida Policy Institute 2016) puts the numbers in perspective and indicates that the state has much room for improvement relative to other states.

3.3 Miami Metropolitan Area Context

The Miami metropolitan area tends to have significant affordability issues relative to other major metropolitan areas. According to the NYU Furman *2017 National Rental Housing Landscape* report, this metro was ranked number one out of metro areas studied for share of renter households that were rent-burdened (over 55%) and severely rent-burdened (over 30%) in 2015. The JCHS report *State of the Nation's Housing 2017* puts the severely rent-burdened share of renters at 35.4%. Accounting for transportation costs as well, the average low-income household in the Miami metro pays 78% of their income. Similarly, when compared to other metro areas, the Miami area had the lowest share of recently available rentals affordable to households earning the Area Median Income in 2006 and in 2015 (54.9% and 43.2%, respectively). In 2015, only 5% of recently available rentals were affordable to households earning 50% of the Area Median Income (the second lowest out of all metro areas).

When looking at rent and salary information that underlie these burdens, the Miami area ranked ninth among metros in median rent at \$1,183, according to the NYU Furman report. The Florida Housing Coalition in its *Home Matters* report also illustrates that several occupations, such as janitors, construction laborers, and medical assistants, do not make enough income to afford a one-bedroom unit at fair market rent.

3.4 Existing Statutes

Florida has a number of statutes related to affordable housing. These include required planning for the provision of housing for a wide range of incomes and vulnerable populations. Many of them allow for and/or encourage affordable housing and various strategies to increase affordable housing development. A notable statute is the State Housing Initiatives Partnership Act that creates an affordable housing funding source at the state-wide level. There are also protections against discrimination in land use decisions and financing. A brief description of key statutes is provided in **Table 3-1**. These descriptions are not meant to be exhaustive, but provide the main points of the section cited.

Table 3-1: Summary of Key Statutes

Statute	Description
125.01055/166.04151 Affordable Housing	Counties/Municipalities are permitted to have laws, ordinances, rules, or any other measures to increase the supply of affordable housing using land use mechanisms.
125.379/166.0451 Disposition of Property for Affordable Housing	Requires county/municipal governments to each prepare an inventory every 3 years of properties owned fee simple by the county/municipality and identify those properties that may be appropriate for affordable housing development. These properties may then be used for affordable housing development or may be sold to help fund affordable housing.
163.3177(6)(f) Comprehensive Plan Housing Element Requirements	<p>The Housing Element must include principles, guidelines, standards, and strategies based on data and analysis to address, among other items:</p> <ul style="list-style-type: none"> • The provision of housing for future residents, including housing for a range of incomes and for certain vulnerable populations. • “The creation or preservation of affordable housing to minimize the need for additional local services and avoid the concentration of affordable housing units only in specific areas of the jurisdiction.” <p>“The element must provide for specific programs and actions to partner with private and nonprofit sectors to address housing needs in the jurisdiction, streamline the permitting process, and minimize costs and delays for affordable housing, establish standards to address the quality of housing, stabilization of neighborhoods, and identification and improvement of historically significant housing.”</p>

Table 3-1: Summary of Key Statutes (continued)

Statute	Description
<p>163.31771</p> <p>Accessory Dwelling Units</p>	<p>Encourages permitting of accessory dwelling units in single-family residential areas to increase availability of affordable rentals for a range of incomes. Local governments may adopt an ordinance allowing for such units when there is a finding of a shortage of affordable housing. An ordinance adopted under this section must include an affidavit attesting the unit will be rented at an affordable rate to certain income ranges and applies towards satisfying the Comprehensive Plan Housing Element requirements for affordable housing.</p>
<p>163.3180(5)(f)6</p> <p>Transportation Concurrency and Affordable Housing</p>	<p>Local governments are encouraged to develop compliments to transportation concurrency, such as reducing impact fees or local access fees for affordable or workforce housing.</p>
<p>380.0651(3)(h)</p> <p>Statewide Guidelines and Standards for Developments of Regional Impact in Relation to Workforce Housing</p>	<p>“The applicable guidelines for residential development and the residential component for multiuse development shall be increased by 50 percent where the developer demonstrates that at least 15 percent of the total residential dwelling units authorized within the development of regional impact will be dedicated to affordable workforce housing”, with certain restrictions to ensure long-term affordability and provisions for the workforce housing to be started before the completion of 50% of the market rate dwelling.</p>
<p>420.615</p> <p>Affordable Housing Land Donation Density Bonus Incentives</p>	<p>A local government can provide density bonus incentives “to any landowner who voluntarily donates fee simple interest in real property to the local government for the purpose of assisting the local government in providing affordable housing” (certain conditions apply). The density bonus can apply to residential land within the jurisdiction.</p>

Table 3-1: Summary of Key Statutes (continued)

Statute	Description
<p>420.9071(16)</p> <p>Definition of “Local Housing Incentive Strategies”</p>	<p>Local regulatory reform or incentive programs to encourage or facilitate affordable housing production, which include at a minimum:</p> <ul style="list-style-type: none"> • assurance that permits for affordable housing projects are expedited to a greater degree than other projects • an ongoing process for review of local policies, ordinances, regulations, and plan provisions that increase the cost of housing prior to their adoption and • a schedule for implementing the incentive strategies. <p>Local housing incentive strategies may also include other regulatory reforms, including those enumerated in section 420.9076.</p>
<p>420.907-420.9079</p> <p>State Housing Initiatives Partnership (SHIP) Act</p>	<p>Provides “funds to counties and eligible municipalities as an incentive for the creation of local housing partnerships, to expand production of and preserve affordable housing, to further the housing element of the local government comprehensive plan specific to affordable housing, and to increase housing-related employment.”</p> <p>To be eligible for and receive a share of funds, a county or eligible municipality must adopt a local housing assistance plan including housing incentive strategies and accompanied by implementation actions. The plan is intended to increase the availability of affordable housing for people with moderate incomes or below, as well as populations with special housing needs. Additional requirements include the creation of a local housing assistance trust fund and an affordable housing advisory committee.</p> <p>Additional affordable housing incentive strategies listed include expedited order or permit processing; modified impact fees and street requirements; flexible densities and lot configurations; reservation of infrastructure capacity; allowance of accessory dwelling units; reduced parking and set-back requirements; establishment of a process to consider certain administrative or regulatory actions that will increase the cost of housing; a printed inventory of public land suitable for affordable housing; support of affordable housing development near transit, employment centers, and mixed-use development.</p>

Table 3-1: Summary of Key Statutes (continued)

Statute	Description
<p>760.26</p> <p>Prohibited Discrimination in Land Use Decisions and in Permitting Development</p>	<p>“It is unlawful to discriminate in land use decision or in the permitting of development based on race, color, national origin, sex, disability, familial status, religion, or, except as otherwise provided by law, the source of financing of a development or proposed development.”</p>

3.5 What are Local Jurisdictions in Florida Doing?

That State of Florida has programs in place to help address this affordability problem, most notably the State Housing Initiatives Partnership Program (SHIP) and the State Apartment Incentive Loan (SAIL) program that fund affordable and multi-family housing. For the 2016-2017 fiscal year, the Florida legislature appropriated nearly \$130 million to SHIP and over \$32 million to SAIL, according to the Florida Housing Coalition.

Additionally, there are many local jurisdictions around Florida taking steps to address the affordability problem. The remainder of this section summarizes findings from a forthcoming report prepared for Collier County entitled *Impact Fee Incentives for Affordable/Workforce Housing*. The report surveyed Florida jurisdictions to get an overview of affordable housing incentives and mandates.

The report finds that a variety of incentive programs are in place across local jurisdictions, yet these are generally not meeting the affordability needs of the community. Of those programs surveyed, the more effective methods have been inclusionary zoning with an in-lieu fee and/or linkage fees, a combination which tends to generate more units and revenue for use in support of affordable housing. Inclusionary zoning implemented in advance of an in-lieu fee seems particularly effective because the in-lieu fee can generate revenues that better reflect the cost of providing housing.

One key argument raised against implementing these types of mandates was that developers would suffer diminished profits. In 2006, Robert Burchell at the Rutgers Center for Urban Policy Research published an important paper in response, looking in particular at the case of Palm Beach County. Burchell shows that the density bonus and other incentives provided by the County’s workforce housing program make up for almost all lost profitability caused by the inclusionary housing provision.

Example Jurisdictions

The following jurisdictions are featured for having (or having up until recently in the case of Winter Park) inclusionary zoning or linkage fee mandates, which seem to be the most effective solutions that jurisdictions are using to address affordability, based on findings from the *Impact Fee Incentives for Affordable/Workforce Housing* report. The Workforce Housing Density Bonus of Miami-Dade County is also featured since it is particularly relevant to the context of Doral.

Palm Beach County

Aside from other incentives, Palm Beach County has an inclusionary housing requirement for workforce housing that became mandatory in 2006. Developments of 10 or more units are required to set-aside a certain number of workforce housing units based on density (**Table 3-2**) or make a cash contribution in the form of an in-lieu fee or donate land of equal value to the in-lieu fee. The County’s in-lieu fee is currently set at \$81,500 per owner-occupied workforce unit and \$50,000 per rental workforce unit. The County requires a 15-year affordability period for owner-occupied units and 30-year period for rental units. The program is made available to eligible households with income ranges between 60% and 140% of the area’s median income, adjusted for family size.

Table 3-2: Workforce Housing Based on Density

Density	Density Bonus Incentive	Density ²	Required Percentage of Workforce Units
LR-1 through LR-3	Up to 30%	Standard Density	5%
MR-5 through HR-18	Up to 100% ¹	Maximum Density	16%
UC or UI	Not applicable	Workforce Housing Program Density Bonus	34%
		UC or UI	15%

Notes:

¹Additional standards apply over 30%

² “Standard Density” refers to standard density allowed by the Comprehensive Plan; “Maximum Density” refers to maximum density allowed by the Comprehensive Plan, where developed as a Planned Development Districts (PDD), Traditional Development Districts (TDD), or other density provision of the Comprehensive Plan. Transfer of Development Rights (TDR) units or any other density bonus are not included as part of the permitted density for calculating workforce housing density bonus.

Discussions with the County indicated that since the program’s inception, there has been approximately 1,300 rental units developed for workforce housing income eligible families. The County also indicated that there are several apartment and townhome units on the verge of producing more workforce housing units, totaling approximately 750 rental units and 100 townhomes. Additionally, since 2006, the County has accumulated approximately \$4 million of fund balance.

Town of Jupiter

In 2015, the Town of Jupiter passed a linkage fee for non-residential development or redevelopment of over 10,000 square feet (sf). Developers are required to pay \$1 per square foot over 10,000 sf. The linkage fee is collected when the building permit is issued and is deposited into the Town’s Housing Trust Fund. Certain uses are exempt.

In addition to the linkage fee, the Town of Jupiter also requires residential development of 10 or more units to build workforce housing units, pay a fee in-lieu of, or donate land in-lieu of construction. The Town requires 6% of the total dwelling units in a residential development to be developed as workforce housing units. In the case of land use amendments or a rezoning, 20% of the development is required to

be workforce housing units. The Town also indicated that an ordinance has recently been passed allowing for the required units to be built off-site. As mentioned previously, developers also have the option to provide a cash contribution or donate land in-lieu of construction. The Town’s in lieu-fee amounts to \$200,000 for each workforce housing unit offered for-sale or \$150,000 per unit for each rental unit. In the case of land donation, the value of land must be equivalent in value to the applicable fee in-lieu (**Table 3-3**). Discussions with the Town indicated that since the 2015 adoption, the Town has accumulated approximately \$300,000 from linkage and in-lieu fees.

Table 3-3: Summary of Fees, Set-Asides, or Alternatives

Requirement	Amount
Linkage fee for non-residential or redevelopment over 10,000 sf.	\$1/sf. over 10,000 sf.
Required percentage of workforce units for developments of 10 units or more	6% of total dwelling units (20% in case of land use amendment or rezoning)
In-lieu fee	For-sale unit: \$200,000 Rental unit: \$150,000
Land donation value	Equivalent value to applicable fee in-lieu

The City of Coconut Creek

The City of Coconut Creek implemented a linkage fee in 2006. The City charges new non-residential development including construction within a mixed-use project, building addition, and renovation of existing buildings and space when the building permit value of the renovation or improvement exceeds 50% of the replacement cost of the building or space at time of construction. Certain uses are exempt. The City’s fees were adopted at 20% of the fully calculated fee. The rate per square foot implemented is \$0.37 for industrial development, \$1.36 for commercial development, \$0.15 for office development, \$2.42 for hotel development, and \$0.70 for limited service hotel development. The City indicated that the funds from the linkage fee are more flexible in that they allow the City to use them for various programs such as down payment assistance, rehabilitation, etc. of affordable/workforce housing.

Winter Park

The City of Winter Park implemented a linkage fee in the early 1990’s at \$0.15 per square foot for both residential and non-residential development, which has since been raised to \$0.50 per square foot. Discussions with the City indicated that the program was generating \$350,000 per year during times of peak development. The City decided to partner with Habitat for Humanity in developing affordable/workforce housing by using linkage fee revenue to purchase lots and donating those lots to the charity to develop homes. The City more recently decided to suspend the fee. However, it has approximately \$500,000 left in its housing fund to use for affordable/workforce housing development. Since the program’s inception, the City has developed approximately 70 units through Habitat for Humanity, the City’s Land Trust, and the City’s building efforts.

Miami-Dade Workforce Housing Ordinance

Passed in 2016, this ordinance requires that each municipality address the need for workforce housing in its jurisdiction (unless an impracticality is determined), either through the County’s voluntary program set out in the ordinance or through a municipality’s own mandatory or voluntary workforce housing development program. The County’s program applies to unincorporated areas. It provides the option of a density bonus for residential developments of 20 or more units that provides workforce housing in the ratios shown in **Table 3-4**.

Table 3-4: Workforce Housing Density Bonus

Workforce Housing Unit Set-Aside	Density Bonus
5%	5%
6%	9%
7%	13%
8%	19%
9%	21%
10%	25%

Additionally, the ordinance specifies a certain distribution of units across the workforce housing income range: at least 25% of workforce units should target the range of 60-79% of the median family income; at least 50% shall target range of 80-110% of the median family income; and developments that build the rest of the units to target the range of 60-79% of the median family income get an additional 3% density bonus.

Alternatives to these program requirements include developing off-site units within a two-mile radius of the original project site, paying an in-lieu fee, rehabilitating existing property, providing land to the County, or a combination of off-site construction and monetary contributions for workforce housing units. Developments of less than 20 units can participate in the program by pursuing one of these alternatives or by designating 100% of units as workforce housing.

4.0 Future Trends

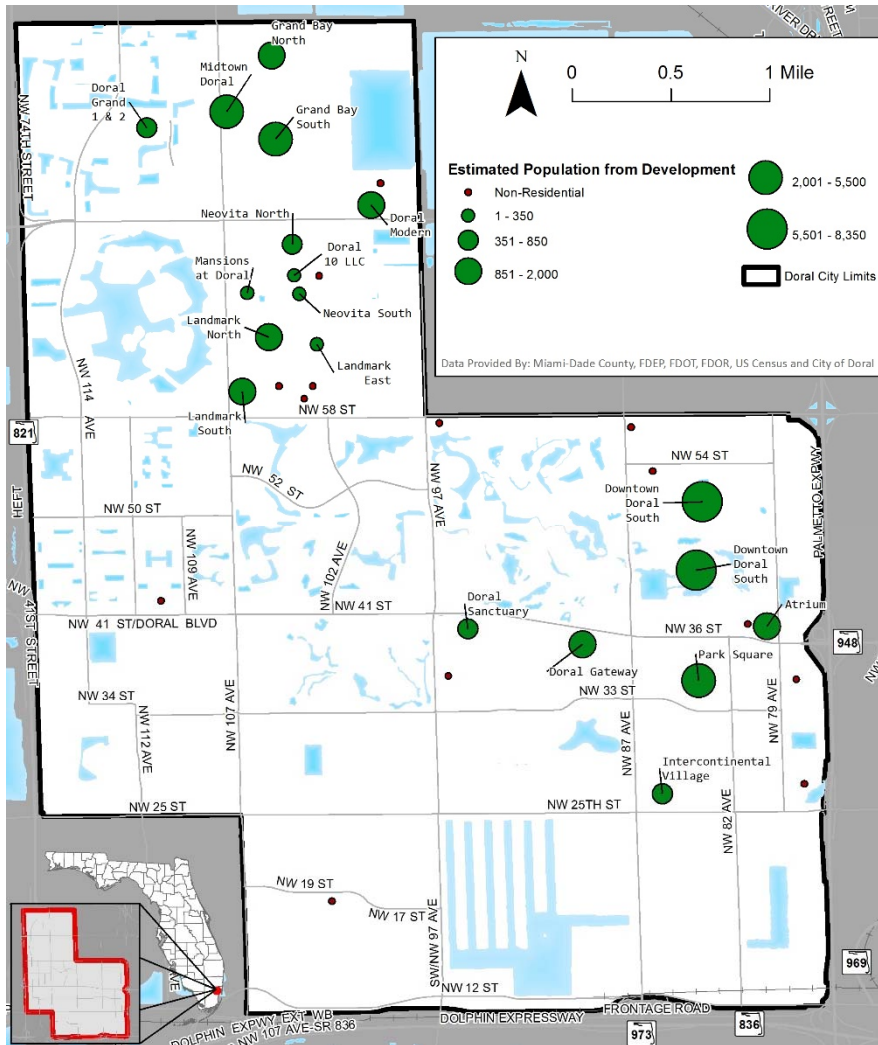
This section presents a cursory review of future growth projections first for the near-term based on developments that have been approved, then in the longer term based on population and employment projections from the Doral Comprehensive Plan, and the Miami-Dade Transportation Planning Organization's 2040 Long Range Transportation Plan. These projections help with the planning for future housing needs, although as documented elsewhere in this memorandum, Doral's current need is great enough that strong measures will likely be needed more immediately.

4.1 Planned Approved Developments

This section shows the locations of anticipated population growth due to new developments that have been approved, as well as a breakdown of number of anticipated units and population summarized by the year of expected completion for the units.

Map 4-1 shows two cluster of population growth, one north of NW 58th Street and east of NW 107 Avenue and the other north of NW 25th Street and east of 97 Avenue. While units are expected to be completed each year from 2017-2021, 2018 will see by far the highest number of units come online and corresponding anticipated growth in population, followed by the year 2021 (**Table 4-1**).

Map 4-1: Location of Estimated Population Growth Based on Future Development



(Source: City of Doral)

Table 4-1: Future Development and Population by Year of Development Completion

Expected Completion Year	Expected Units	Expected Population
2017-18	332	830
2018	6,073	15,185
2019	1,727	4,319
2020	1,548	3,870
2021	5,547	13,868
Total	15,227	38,072

(Source: City of Doral)

4.1 Population/Employment Projections from Doral Comprehensive Plan

The population projections identified in the Comprehensive Plan (adopted in 2016) represent the City’s officially adopted projections used for land use and infrastructure planning. These projections show substantial growth from 2015-2030 (85.8% increase), which could create a demand for 15,506 new housing units assuming the 3.08 persons per household multiplier from the 2015 ACS. **Figure 4-1** below summarizes the projections from the Doral Comprehensive Plan.

Figure 4-1: Doral Population Projections from 2016 Comprehensive Plan

Year	Population	Average Annual Growth Rate (5-year Planning Horizon)
2000	21,000	---
2005	33,633	9.4%
2010	45,709	6.1%
2011	46,521	2.6%
2012	47,534	2.6%
2013	49,253	2.6%
2014	52,889	2.6%
2015	55,660	2.6%
2020	78,668	5.7%
2025	91,409	3.0%
2030	103,421	2.5%

* Table Sources and Assumptions: 2000 estimate from Miami-Dade County; 2005-2009 and 2011-14 estimates from BEBR, University of Florida; 2010 estimate from U.S. Census; 2015-2030 projections prepared by ILER PLANNING, 2015. Projections assume no annexation or redevelopment of residential land; 6.3% annual growth rate used for 2015-25 period based on average annual growth during 2005-14 period; 2.5% growth rate assumed for 2025-30 period due to potential for reduced land availability; 3.3 persons per household assumed per U.S. Census.

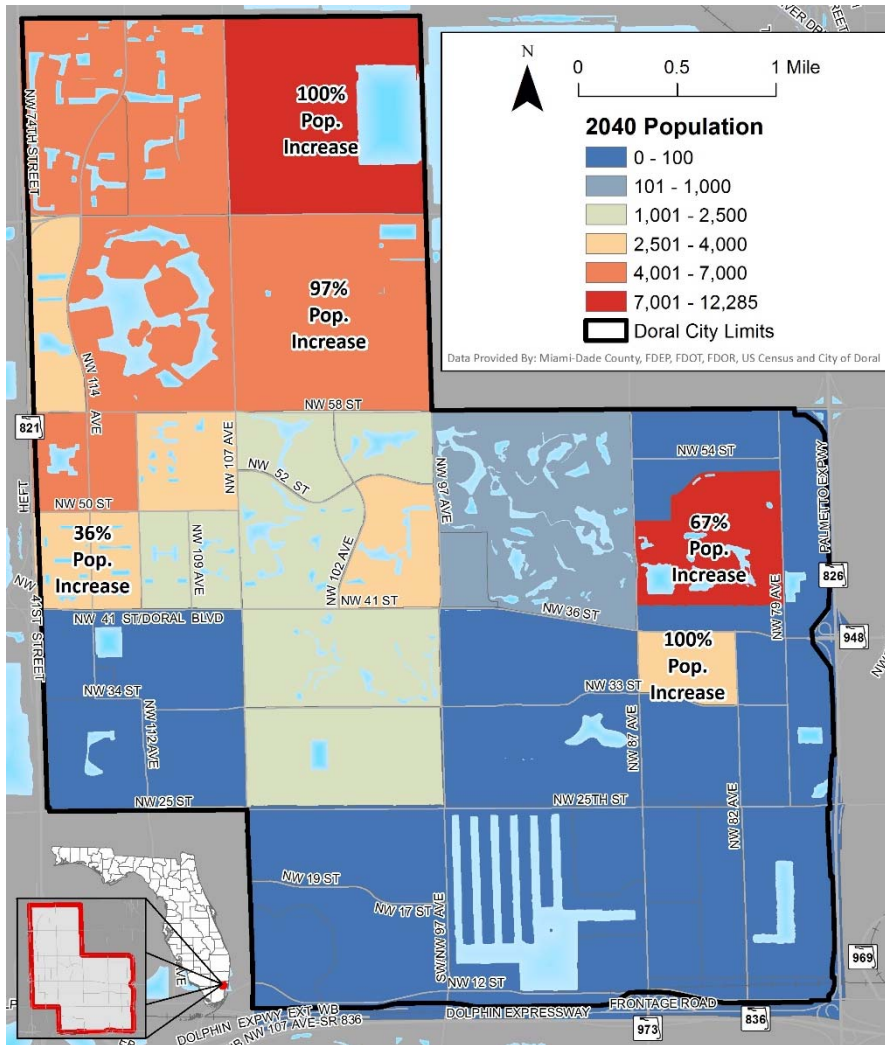
4.2 Population/Employment Projections from Miami-Dade TPO Long Range Transportation Plan (LRTP)

The following projections show population and employment in the longer term, based on the Miami-Dade 2040 Long Range Transportation Plan. It includes the anticipated location of the growth, as well as a comparison of population growth in the city relative to the County as a whole. Comparing locations of housing and job growth will help determine how well these locations match and what resulting transportation considerations will be needed to ensure residents can get to their jobs.

4.2.1 Population

Map 4-2 shows the anticipated number of residents for each Transportation Analysis Zone. Certain areas also have the percent change in population between 2010 and 2040. Note that many of the areas with the highest projected population and increases in population correspond to the growth areas identified based on future development, shown in the previous section. In contrast, the southern part of the city is expected to have relatively low population levels.

Map 4-2: 2040 Population Projections



(Source: 2040 Miami Dade Long Range Transportation Plan)

Table 4-2 shows the percent change in population for the City of Doral and Miami-Dade County (incorporated and unincorporated). The change in population is expected to be much higher for Doral than for the County as whole, indicating that Doral will see relatively high rates of growth that will need to be accounted for in terms of housing.

Table 4-2: Percent Change in Population Doral and Miami-Dade County

Year	Doral Population	Doral % Change	Miami-Dade Population	Miami-Dade % Change
2010	45,711	40%	2,512,164	24%
2040	76,093		3,306,920	

(Source: 2040 Miami Dade Long Range Transportation Plan)

5.0 Next Steps

The next steps in the development of the draft Housing Master Plan are listed below. Each of these steps will require close coordination and collaboration with City staff to create a customized plan and approaches.

- Collection and integration of input and insights gathered from stakeholder interviews and public workshops.
- Development of program goals, measureable objectives, and key performance measures that will be utilized to measure success.
- Development of recommended tools and approaches to accomplish program goals and objectives.
- Completion of a Master Plan for adoption and implementation



APPENDIX B

Public Outreach Summary



To: Julian Perez, AICP, CFM, Planning Director (City of Doral)
From: Evan Johnson, AICP, LEED AP, Project Manager (Tindale Oliver)
Subject: City of Doral Housing Master Plan
Stakeholder Interview Summary
Date: August 31, 2017

I. Introduction

A total of 11 stakeholders were interviewed during three separate meetings by the Tindale Oliver Team and City of Doral staff during meetings held on August 16, 2017. The stakeholders were from both the public sector and private sector and included developers, land use attorneys, local government agency representatives, and neighborhood representatives.

II. General Introductory Comments by Julian Perez

- The FIU Economic Assessment is already under way and provides a platform for the Housing Study; although the focus on of that study is on economic development, because the FIU study is comprehensive it will overlap with the Housing Study.
- The outcome of the Housing Study may include comp plan amendments, land use and zoning amendments, partnerships, programs, etc.
- The process is in the data collection and analysis stage. Currently, the consultants wish to talk to those who know and have influence on the Doral and regional housing market. Their perspectives will inform our understanding and our approach to the analysis.
- Reason for Workforce Housing Ordinance moratorium: The Council wants to back it up with an evidence-based data analysis, and integrate it into the comprehensive plan update. The City also wants to make sure the Ordinance is achieving its goals, and tweak it if necessary.
- Conditions in the City are moving too rapidly; change is swift and for this reason this study is very timely.

III. Stakeholder Meeting #1 (Developer Community/Real Estate Focus)

Attendees:

- Carolina Herrera (Developer/Lennar)
- David Martin (Developer/Terra)
- Alberto Ruiz (Realtor)
- Tracy Slevens (LU Attorney/H&K)

All present have worked in the development industry within Doral as well as around the region; some of them live in Doral as well. Carolina and Tracy are currently on the leadership of the Builders Association of South Florida. Alberto is considered one of the co-founders of the City of Doral.

Perceptions of the local housing stock

- Fairly new units overall - *“For anyone looking to buy a new unit, this is the place.”*
- Includes almost all price points and unit types – *“but diversity of the housing stock exists mostly for upper middle income but not lower income market segments”*
- Higher end units tend to be single family – there’s little or no “single family workforce” units (detached or attached)
- There are many rental communities with many more coming
- Prices here are higher than in other parts of the county
- Approximate price points for housing to be considered affordable or workforce could range between \$140k – \$280k, or about \$2,800/mo in rent.
- A \$225k SFR in Miami Dade County exists as an apartment in Doral.
- Average vacancy about 20% (includes seasonal vacancies).
- One of the City’s biggest problems is foreign demand/flight capital. Investors pay cash, can afford high-priced housing, and locals get priced out.
- Still, there are a good number of “move-ups” in the housing market, which says something about the Doral economy
- Doral’s comp city for housing prices may be Coral Gables; Aventura for housing mix. Both were seen as the “model cities” by Doral’s founders.
- Fountainebleau provides lower price-point stock, but the housing there is older and in poorer condition.
- The original core of Doral is older housing, but a lot of it is in gated communities. Residents in this part of town live, work and play here.
- In the north side of town, the communities are open, but people tend to work outside of the city.
- There are some interesting “urban-setting” infill single family, townhouse and apartment projects occurring.
- Some golf courses are redeveloping for higher end homes and rental apartments.
- Luxury rentals are always full from day one – *“...they sell like hotcakes because of our schools and parks”; “Doral is happening”; “The more you build the more they come.”*
- Doral’s older housing stock will end up becoming the city’s workforce/affordable housing – *“...it will fill that need, it feels older, more affordable.*

What are Doral’s challenges and opportunities in terms of housing?

- The quality of schools and parks is a big draw for families – “What else is missing in Doral for young families and single professionals?” (look to Wynwood, Brickell, Midtown-like environments)
- Transit accessibility needs improvement – *“...in particular the “garden” (gated) communities are isolated”; “...high rises in an urban condition work, but garden apartments and rental are in a suburban condition without transit.”*
- Parking requirements are seen as a problem – commercial requirements are too high as are residential. Increases development cost because land is expensive. Lowering parking requirements for some residential areas could reduce development costs.

- How can the City create more interesting, walkable nodes that include affordable/workforce housing?
 - Could it be garden apartments closer to a commercial setting?
 - Are high rise buildings compatible with the city character? – “...but they are expensive to build and have high price points.”
 - Consider the psychological factors – some people simply do not want to live in multifamily or high-rise buildings

Perception of/opinions on density

- A lot of new product has been coming online since 2010 but the density range, from the comp plan standpoint is pretty low – lower than other municipalities.
- This is probably from a mentality of protecting the single-family home neighborhood.
- At this level of low density, it is hard to incentivize middle income/workforce housing.
- One possible solution would be to better promote small development.
- Ideally a 5,000-sf lot, with 6 units in 2-3 story building, removing parking requirement but with access to transit would be very cost effective to build and would keep prices lower.
- Problem is SFR neighborhoods don't want that kind density nearby.
- High rise has to be luxury rental or the numbers don't work. This is due to the development costs, particularly with podium garages.
- The City must undertake a smart communication strategy about density – what it means, what it looks like, what the tradeoffs of higher density to jobs, services and so are, etc.

What areas of the city might be appropriate for denser housing or affordable housing units?

- There are potential opportunities in areas along major corridors (e.g. 79th Avenue, 58th Street, 41st Street, 25th Street) that may present opportunities for some increased density that could help with the land use transition between busy commercial corridors and single family communities.
- Areas in the southern part of the city would be more acceptable for denser affordable housing than the northern side where mostly there are SFR neighborhoods.
- Look at 107th through Doral all the way to 90th – we need to decide as a community what's going to happen to this commercial corridor.
- High rises are not a problem, as long as they're in the right locations. Locate them closer to the highways, e.g. 97th to 117th and 57th to 74th.
- We also need to decide as a community what to do with our industrial land: we need it, but the flip side is that some of those areas could provide the nodes for higher density residential.
 - We need to keep our diverse tax base – one of the most balanced in the county.
 - The question is, would the City do well to create a work/live environment in those industrial areas? – “Could you allow/encourage an industrial owner to build innovative integrated housing?”
 - The City is very careful to protect the southern industrial area to reserve room for growth.
 - 33rd St represents the imaginary line – but in 15 years, could the nature of industrial change enough to allow for more mix south of that line?

- Section 16 MDC landfill – 58th street landfill, capped, 20% of the section. MDC was going to build a sports village but there was no bidder response. City has an application to annex the entire section. Doral also annexing Section 6 (industrial park DRI)
- North of downtown Doral – possible location for workforce housing;
 - City is working with property owners;
 - City wants it declared a brownfield area and to bring tools for developers in case there are environmental issues.
 - Steps include applying to EPA for pilot program to do planning for the entire area, then prepare a master plan or zoning in progress.
 - Top priority of for continuation of Downtown mixed use

Policy and regulatory issues

- Discrepancies in the code create issues for redevelopment – limitations for commercial development in industrial districts
- The list of permitted uses and charts for districts don't match with the actual nature of the districts. Uses and zoning don't match. This is a holdover from the old MDC code.
- The City needs to make it easier to adaptably reuse or redevelop some of the industrial areas.
- In some properties, the uses are bifurcated through middle of land, which made sense at some point in the past but not now.
- Mixed use zoning should be applied to some of the commercial corridors, e.g., north side of 79th – “going vertical in the right location may be the solution”
- Everything the city is doing now, is to clean up – comp plan, LDC, etc. and look toward the future
- Nonconformities on the east side of 79th – 79th should be a version of commercial corridor, where there are people now moving into apt complexes.
- If incentives were to be provided, where should that be?
 - 79th Avenue corridor
 - 87th and 97th Avenues
 - 58th street
 - Portions of 41st/36th and 25th
 - Lemon property – access to turnpike, surrounded by commercial and industrial
- 107th Avenue is a problem because it is a County road. Improvement to intersection at 47th (changing movements)
- Plan for flyover from 25th to 41st. \$1 mill grant from FDOT just received

Is it important for Doral to have a balanced mix of housing?

- It all comes down to a philosophical discussion of who we want to be as a community - “Do we want to serve all income levels here, or be Palm Beach?”
- Decide what the social benefit of having multiple income levels is – “...does it make us a better community DNA, give us a soul”.
- Who we want to be is always the question, but it seems to change with every election.
- The discussion about what kind of city we want to be in terms of housing and transit was put on hold for the past election.

- No new residential was the platform on which some council members ran last time, but no more housing creates more traffic if you don't provide the housing to support jobs.
- There's a lack of understanding of how an urban environment really works and of how Doral has changed over the last 20 years.
- The City needs to take a proactive approach – “*master plan for what you want to see*”; “*that could bring even speculative landowners to the table.*”
- There has to be a realistic vision, coming from the recognition that Doral has to have a mix of uses, a mix of incomes, and a mix of development.
- The Doral Master Plan will result in some outcomes that may be problematic/unpopular; there has to be push and pull.
- Public engagement and messaging will be very critical.

Housing Master Plan analysis questions/suggestions

- Will the analysis be made publicly available? This would be very beneficial.
- Break down data by housing type and numbers of units and price points (in \$50k increments to see how many units in each price point.)
- Include occupancy data.
- Address mix of seasonal and permanent population.
- Include comparison to other cities – But keep in mind “*Doral is the most unique city in the country: a gateway for immigrants **and** a high-end job center.*”

Group suggestions

- Promote adaptive reuse
- Revisit parking requirements for commercial
- Consider street design as it pertains to sidewalks and on-street parking
- Review appropriateness of ratios for commercial and industrial commercial land
- Plan for rapid transit
- Expand trolley service with more routes – “ridership is super-hot!”
- Add more bike paths

IV. Stakeholder Meeting #2 (Planned for Business/Employer focus, but included developers/attorneys as well)

Attendees:

- Brian Adler (LU Attorney B & S)
- Joe Goldstein (LU Attorney/H & K)
- Joe Jimenez (Developer/Codina)
- Daniel Munecas (Police Officer/City of Doral PD)

Perception of current state of housing market in the City

- It's fine but not enough people who work in Doral live in Doral
- Many residents see density as an evil – (reference recent project as an example)
- Doral is a “*victim of its own success*”
- The “*ship for cheaper housing has sailed*”
- Even in Miami Dade County, people are “*making housing affordable*” by splitting rent with roommates.
- Affordable housing in Doral is “*two bedrooms and a roommate*”

Perceptions of/opinions on density

- Do the residents think Doral can have affordable housing and keep values high? The City needs to prioritize what people want – “*Do we want density or high ad valorem?*”
- The present situation is Doral being the victim of some of prior council's decision to cap at low densities to appease vocal residents
- To bring affordability, the density must be higher than it is now, but then the home values may go down.
- The numbers just don't work with land prices here unless you increase density; the cost of land makes it nearly impossible. Additional expenses in Doral include art in public places, FEMA regulations, etc.

Is it important for Doral to have a balanced mixed of housing?

- Areas of affordable housing are very close by – Doral is “*surrounded by areas of cheaper housing... maybe they should count as Doral's affordable housing*”; “*...looking inside to provide solutions could give you results different from what you want.*”
- The City of Doral is very blessed with a great location and international attention – “*...it'd be nice if the economics were down to the level where housing can meet needs.*”
- Who constitutes Doral's workforce? City of Doral young staff; our police officers. This needs to be messaged carefully – “*Put a face on the issue*”
- The Doral PD is the highest paid department in the city and not many can afford to live in the city. Those who do is often because they bought their homes many years ago.
- Courtesy officer unit offers from developers are usually the only instances where police officers live here;
- Many are moving to Homestead and farther south because that's where they can afford to purchase a home.

Policy and regulatory issues

- What sort of incentives could change the equation?
- What does the City have authority to change? Impact fees, ad valorem rates?
- Decide what is to be done and communicate it clearly and consistently - “*Developers are the most flexible people in the world if you tell us the rules.*”
- Density bonus is a loser - “...it does not make for a good project.”
- Local ordinance applied to Atrium and Midtown? But would not get enough density to make the projects work and the pattern book would have to be modified.

Miami Dade Workforce Housing Ordinance

- Joe Goldstein and Brian were involved with BASF putting together the County’s Workforce Housing Ord. previous effort (2007) didn’t work,
- was mandatory at first
- not practical and was made voluntary
- ultimately nothing came of it.
- New one is voluntary
- Between \$80-\$140k

Perceived challenges or obstacles for workforce/affordable housing

- Cost of land
- Excessively high development costs (impact fees) - “*Doral is pretty unique in how high the fees are... you have about \$45k in fees before you can even get a shovel in the ground.*” (\$8k+ in roadway, fire, etc. fees; \$14k+ water/sewer connection (double other communities); art in public places fees; raising property by 1’ +, etc. + FLUM etc).
- Appraisal issues
- Deed restrictions to maintain workforce housing - “there’s no realization of equity from investment for sellers”
- Salary differentials with other cities (e.g., Coral Gables for police officers).

Group suggestions

- Public private partnerships
- Issue RFP for officers’ housing with tax abatements and incentives
- Attack the problem from many sides - a bunch of partial solutions, not a single solution (“basket of ideas suited to Doral”)
- “Plan for what goes right,” e.g.:
 - Make change through local comp plan amendments, they have less visibility when they include affordable housing - this insulates elected officials from having to make case-by-case decisions which can be politicize.
 - Leverage the site plan process - administrative or public hearing for minor or major project respectively.
 - Offer project exemptions in the approval process (there is precedent for this).
- Consider long-term effect of subdividing land and market trends - “the demand now is for SFRs but if we parcelize the land we lose the opportunity for higher density in the future.”

- Look for opportunities for the City to identify and acquire land to support private workforce housing development (is there or could the City get land acquisition funds?)
- Explore mechanisms similar to a CRA that could help pay for infrastructure improvements (TIF?)
- Don't make affordable housing mandatory – *“most developers would be willing to work through the process if it's clear and they can come up on top at the end.”*

V. Stakeholder Meeting #3 (Community/Neighborhood Organization Focused)

Attendees:

- Morgan Levy (“Father of Doral”/co-founder, Doral resident for 36 years)
- Linda Scott – (Doral resident, active in neighborhood association)
- Ivan Rodriguez – (MDC Public Schools)

Perception of the current state of the housing market in the City

- Builders are either already here or dying to build here, and we can demand more from them – *“...not everything can be a \$900k+ home”*
- “Available housing” usually does not mean affordable or accessible.
- Many older neighborhoods are gated and run by associations, many have turned to condos, even those older areas are decently maintained and sell well.
- Lemon property – is it an opportunity? Over 200 acres. Needs a Master Plan. Hospital complex like Baptist campus? School on the south side of the site?

Perceptions of/opinions on density

- Not a problem, if the original vision of the city character is respected.
- Example of “bad” density – 8800 project on 36th considered bad not for the density but the character (which people then forever associate with density). Massing, lack of landscape, no setback, sidewalks right on the road.

Is it important for Doral to have a balanced mix of housing?

- Yes, if the original vision of the city character is respected.
- The City needs housing for people who work here, to reduce traffic.
- Housing needs to be complemented by public transportation and the ability to walk places.
- Parents would sacrifice the “perfect home” for the ability to live closer to where they work.

Perceived challenges or obstacles for affordable/workforce housing

- To some extent home prices here are at the mercy of the situation in Venezuela.
- Complacency – *“people complain but don’t want to put the time to fix what they complain about”*; *“...if you have a problem don’t complain do something about it”*
- Ignorance
- Greed

School system issues

- There are 5 public schools in Doral.
- MDCPS owns land for charter school (developed with Codina).
- MDCPS acquired 4 ac parcel in Grand Bay, which was going to be a charter school. Exchange with developer; now will be a public school (k-8), 2 year window (contractual obligation, and housing already being built in Grand Bay).
- All schools are A-grade schools, attracting more families to Doral.

- Also have many charter schools, which also brings people in – *“...kids in our schools are from families who don’t live here create more traffic and overload local schools.”*
- Doral schools are all over capacity except a newly opened school, attendance boundaries have been adjusted to alleviate another school.
- Former Doral middle school, high school is at cap and excess is being sent to Doral MS, eventually it will also be all high school.
- K-8 model is preferred by parents
- MDCPS is not involved in workforce housing. At one time the discussion was ongoing about how to incentivize developers to provide housing for teachers, but went nowhere.
- Have been unsuccessfully looking for opportunities to provide facilities in nontraditional settings (e.g. downtown model).
- Trends in student generation: County going through property appraiser’s office, MDPS shares data on location of every student, new numbers will be available within a year.

Group suggestions

- Balance housing needs and character needs to respect original vision of Doral.
- All future development of residential should be required dev to set aside % of affordable housing
- Deal with perceptions (messaging) – “affordable” or “workforce” has a connotation that make people think Section 8.
- Workforce: show and educate people about who the City or Doral’s workforce is and how vital they are: city workers, teachers, police officers, bank tellers, etc.

To: Julian Perez, AICP, CFM, Planning Director (City of Doral)

From: Evan Johnson, AICP, LEED AP, Project Manager (Tindale Oliver)

Subject: City of Doral Housing Master Plan
Public Workshop Summary

Date: November 13, 2017

Meeting Attendees: See attached sign in sheet

I. Introduction:

Evan Johnson (Tindale Oliver) made a brief PowerPoint presentation on the scope of the Housing Master Plan project, and the results of the assessment process which included an analysis of the existing housing stock, current affordability issues, and future economic trends.

Following the presentation, a general discussion on the project occurred. The following includes a brief summary of major points of discussion.

II. Points of discussion:

- There was a general consensus on the need for supporting the development of workforce housing in Doral. Rental and purchase prices were seen as too high for young professionals, public employees, etc. which are seen as important to the community's continued growth.
- Particular focus was put on teachers/educators and their inability to remain in the local schools due to the cost of housing. Anecdotal information was given to this trend, and a report was mentioned that details case studies of creative approaches that communities from around the country have taken in order to provide housing for teachers.
- There was a discussion on the possibility of developing "micro-units" as a possible solution to workforce housing, particularly for young professionals without families. It was noted that there have been several of these types of projects approved in Miami.
- Marketing and education were mentioned as important elements of any type of program developed. There is a lot of misinformation about what workforce housing is, and that creates mistrust in efforts to implement a program. The City should spend more resources on educating the public on what the target audience is and why it is important to provide housing for them.
- There was one participant who was opposed to the implementation of a workforce housing program. This participant did not see the need to provide this type of housing due to the proximity of more affordable housing options in adjacent jurisdictions and was concerned about the effects on property values.



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