



# **FEC Corridor Economic Assessment**

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**Prepared for:                    The City of Miami**

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## **Preface**

The following assessments are submitted under separate attachment to the FEC Corridor Strategic Redevelopment Plan. The assessments include the following:

Attachment A: “FEC Corridor Economic Market Assessment”

Attachment B: “FEC Corridor Right-of-Way Study”

Attachment C: “FEC Corridor Streetscape, Open Space and Recreation Assessment”

The assessments considered the existing economic, land use, housing, transportation, public infrastructure and open space conditions of the FEC Corridor study area. Together they provided the preliminary framework and underpinnings for the plan’s implementation strategies. The assessments evolved from the initial findings and recommendations of the FEC Corridor Task Force and include the input from residents and stakeholders during the community conversation process.

## Summary of Key Findings

The following planning assessments depict the FEC Corridor as an area in transition. The corridor has been experiencing renewed private real estate investment activity. However, existing population characteristics, land use patterns and public infrastructure conditions do not support a sustainable neighborhood revitalization effort. An understanding of current and projected market conditions and existing land use/zoning, transportation and public infrastructure conditions will prove useful in developing appropriate and sustainable revitalization strategies for the FEC Corridor. Each of the following assessments identifies issues pertinent to the corridor's capacity for economic and neighborhood revitalization along with preliminary recommendations for future planning consideration.

The following are the key findings from the assessment reports:

### ➤ **Finding**

Commercial real estate investment within the FEC Corridor is fairly strong with demand stemming from a nearly saturated Miami Beach market. Demand conditions are affecting commercial/industrial areas in each of the three neighborhood sub-areas. Escalating demand for commercial loft, warehouse and wholesale/retail space has already begun to significantly increase both acquisition and lease prices for commercial properties. Preliminary data indicates that the re-sale value of residential properties in certain sub-markets is also on the rise.

### **Planning implication**

The growing level of investment and rising cost of real estate within the FEC Corridor should be viewed as a positive indicator. However, growing demand and rising costs could limit redevelopment strategies involving land acquisition and assemblage. In addition, homeownership strategies will need to consider escalating housing prices.

### ➤ **Finding**

Real estate investment, in the short term, will continue to be "incremental" and targeted to the commercial zones and corridors within Little Haiti, Wynwood and Edgewater.

### **Planning implication**

The current incremental investment pattern that is occurring is compatible with the economic redevelopment planning goals for the FEC Corridor. The concept plans currently being developed at strategic locations along the corridor can serve as prototypes for a more "planned" continuation of the incremental redevelopment growth pattern.

➤ **Finding**

A housing affordability gap exists in the neighborhoods that comprise the FEC Corridor. Generally low household incomes combined with escalating housing prices limit housing choice and opportunity for neighborhood residents.

**Planning implication**

A housing strategy for the FEC Corridor will require local government intervention. The targeting of new and existing housing, code enforcement and public infrastructure programs and initiatives will be required. Private lending commitments will also be necessary

➤ **Finding**

The strong demand for warehouse space in close proximity to the Port of Miami and I-95 will continue to exert pressure on the existing inventory of commercial and industrial space within the corridor.

**Planning implication**

Warehouse demand will create pressure on the existing inventory of industrial space at a time when small manufacturing, e.g. custom fabricated metals and custom furniture production firms are taking hold within the corridor. The assessment also cited the growing plastics industry in Miami-Dade and its potential for manufacturing growth within the corridor. Given the FEC Corridor study's priority for job creation, it will be important to include a proactive manufacturing strategy that helps preserve and strengthen the corridor's industrial base.

➤ **Finding**

The FEC corridor plan will need to address the current truck traffic volume from the Port of Miami and other locations/destinations impacting local streets within the corridor.

**Planning implication**

Short-term measures will need to be considered including geometric improvements to problem intersections and truck exclusions for local streets where pedestrian oriented development will be encouraged. While the Port of Miami is the single largest contributor to truck traffic within the corridor, the growth and proliferation of warehouse operations in the corridor has also become a leading factor.

➤ **Finding**

The city's existing zoning code is not an effective planning tool for advancing the redevelopment vision and goals for the FEC Corridor.

**Planning Implication**

The FEC Corridor plan will require the creation of new zoning districts that clearly define and encourage appropriate redevelopment activities within each neighborhood sub-area.

The proposed zoning districts should emanate from the Phase III planning process and the practical application of zoning regulations and performance guidelines to the proposed neighborhood redevelopment concept areas.

➤ **Finding**

Existing streetscape conditions do not support the pedestrian-oriented, mixed-use redevelopment pattern envisioned by the FEC Task Force and community conversation meetings. A lack of street definition is pervasive throughout the corridor distorting both the public and private realms.

**Planning implication**

Existing streetscape conditions suggest the need for targeted public infrastructure improvements coupled with private developer participation. Public infrastructure improvements should be targeted to locations with high visibility and redevelopment potential. Pedestrian linkages between residential, employment, school, recreation and shopping locations will need to be included in the redevelopment action plan as well as the connectivity between neighborhood sub-areas and the downtown.

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## **Project Background**

The FEC Corridor is an economically distressed inner-city redevelopment area consisting of approximately 2000 acres. The corridor is comprised of a mix of industrial, warehouse, commercial and residential uses with a disproportionate share of vacant parcels and underutilized buildings. Most of the neighborhoods within the corridor have double-digit unemployment rates due to the loss of 19,150 jobs in the area between 1980 and 1995. The corridor contains an estimated 70 percent of the city's remaining land zoned for industrial and warehouse uses.

The FEC Corridor was the subject of a redevelopment study in 2000 initiated by the City of Miami through a Task Force comprised of government officials, business leaders, community non-profits and the real estate development community. The mission of the Task Force was "to identify and facilitate redevelopment opportunities within the corridor by facilitating private sector investment in underutilized areas; stimulating and safeguarding industrial and commercial uses; ensuring compatible land use buffers; improving transportation accessibility; and enhancing employment opportunities for city residents as well as the overall economic impact on the city, all within the context of creating and preserving a livable community."

The Task Force meetings focused on developing a general understanding of the FEC Corridor, its strengths and weaknesses and its market potential. In order to study the corridor in greater depth, the Task Force created three committees to concentrate on specific neighborhood sub-areas adjacent to the corridor: Little Haiti to the north; Wynwood to the south and west; and Edgewater to the east. Each committee was asked to identify problems, needs and opportunities within their respective neighborhood study areas and to formulate a vision with specific recommendations to help facilitate neighborhood revitalization.

The Task Force released their "Findings and Recommendations" in September 2000. An implementation work plan was then formulated to focus on specific areas of need and opportunity identified by the Task Force for the three neighborhood sub-areas. A study team consisting of city staff, faculty and students from Florida International University and private consultants developed a comprehensive strategic action planning study to focus on such issues as economic development, transportation, zoning, land use and urban design. Phase I of the action plan created the database and mapping for each component of the study. During this phase, a series of community workshops were held to gain the on-going input from the residents of each of the



three neighborhood sub-areas. Information from the Phase I data gathering and analysis and community workshops provided the basis for the following planning assessments.

## Overview of the Miami Market

### General Rankings

- Miami appeared on *Travel & Leisure's* list of the world's 100 best cities. It was ranked #48 in the U.S. Criteria included activities/attractions, culture/arts, people, restaurants/food, and value. *Travel & Leisure, 1998 World's Best Awards*
- Miami was selected by *Yahoo! Internet Life* as one of "America's Most Wired Cities & Towns." The city ranked #28 out of 50. Criteria included home and work net use, domain density, hosts per capita, directory density and content quality. *Yahoo! Internet Life, March 1999*
- Miami was ranked #19 out of 19 large, southern metropolitan areas in *Money's* 1998 Survey of "The Best Places to Live in America." The survey was conducted by first contacting 512 representative households nationwide and asking them to rank 37 quality-of-life factors on a scale of 1-10. Next, a demographic profile was compiled on the 300 largest metropolitan statistical areas in the U.S. to provide an overall ranking (factors Americans consider most important, e.g. clean air and water, low crime, and good schools received extra weight). *Money, July 1998*
- Zero population Growth ranked 229 cities in terms of children's' health, safety, and economic well being. Miami was ranked #20 out of 25 major cities and was given a grade of D. Criteria included total population, percent of population under 18, household language, percent population change, percent of births to teens, infant mortality rate, percent of low birth weights, dropout rate, enrollment in preprimary school, violent and property crimes, unemployment rate, percent of children in poverty, percent of owner occupied units, number of bad air days, percent of public transportation commuters, and average time to work. *Zero Population Growth, Children's Environmental Index, Fall 1999*
- A study by *Cognetics* of 273 metropolitan areas in the United States showed that Miami ranked 25<sup>th</sup> out of 50 large metropolitan areas when ranked in terms of entrepreneurial activity. Criteria included "Significant Starts" (firms started in the last 10 years that still employ at least 5 people) and "Young Growers" (percent of firms 10 years old or less that grew significantly during the last 4 years). *Cognetics, "Entrepreneurial Hot Spots: The Best Places in America to Start and Grow a Company," 1998*
- Miami was selected as one of the "Best American Cities to Start a Business" by *Point of View* magazine. Criteria included "coolness," quality of life, and business concerns. The city was ranked #48 out of 75. *Point of View, November, 1998*
- Reliastar Financial Corp. ranked the 125 largest metropolitan areas according to the general financial security of residents. Miami was ranked #116 out of 125 with a score of -15.3. The score indicates the percentage a metropolitan area is above or below the metropolitan norm. Criteria included Earnings and Wealth Potential (household income, education, net assets, cost of living); Safety Net (health insurance, retirement savings, life insurance, income support programs); Personal Threats (unemployment rate, low-income households, crime rate); and Community Economic Vitality (cost of community services, job quality, job

creation, and housing costs). *Reliastar Financial Corp., "The Best Cities to Earn and Save Money," 1999 Edition*

## I. Demographics

### A. Methodology

The 2000 U.S. Census is the primary data source for this section. Estimates from the Year 2000 data are calculated to provide an overall description of the three neighborhood sub-areas within the FEC corridor: Wynwood, Edgewater and Little Haiti. Where data is provided in percentages, whole numbers are used to aggregate the census tracts for each neighborhood. For example, "Age Range Distribution" is calculated as follows:

#### 2000 Age Range Distribution

Neighborhood and Tract	No. of Households (from Census Data)	2000 Data Provided by Census	Calculated to get overall percentage for neighborhood
	2000 Update	0-17 (%)	0-17 (Whole number)
<b>Wynwood</b>			
12-025-0026.00	4,461	34.1%	1,521.2
12-025-0028.00	2,117	37.9%	802.3
<b>Wynwood Total Number</b>	6,578		2,323.5
<b>Wynwood Total Percentage</b>			$2323.5 / 6578 = 35.3\%$

In the above table, approximately 35.3 percent of the population in the Wynwood neighborhood is less than 17 years of age. This basic calculation was performed for the majority of tables.

## 1. Census Tracts

Much of the demographic data for the FEC Corridor was gathered at the census tract level. The following is a list of census tracts that fall in each of the three neighborhood sub-areas:

Neighborhood	Census Tract Number
<b>Wynwood</b>	12-025-0026.00
	12-025-0028.00
	12-025-0031.00
<b>Edgewater</b>	12-025-0013.01
	12-025-0013.02
	12-025-0021.00
	12-025-0027.01
	12-025-0027.02
<b>Little Haiti</b>	12-025-0011.02
	12-025-0014.01
	12-025-0014.02
	12-025-0020.01
	12-025-0020.03
	12-025-0020.04
	12-025-0022.01
12-025-0022.02	

## 2. Zip Codes

Data for the industrial analysis of the FEC corridor was gathered using U.S. Postal Zip Codes. Zip codes 33127 and 33137 cover a large area of the FEC Corridor study area extending south from NW 62<sup>nd</sup> Street to NW 20<sup>th</sup> Street. Zip code 33127 extends about 10 blocks west of the study area. The combination of these two zip codes provides the best representation of the study area.

## B. Population Characteristics

### 1. General

In the ten years between censuses, the general trend in Miami-Dade County has been a population increase. However, contrary to the general trend, the Wynwood neighborhood saw a significant decrease in its population.

#### Population and Households: FEC Area and Miami-Dade County

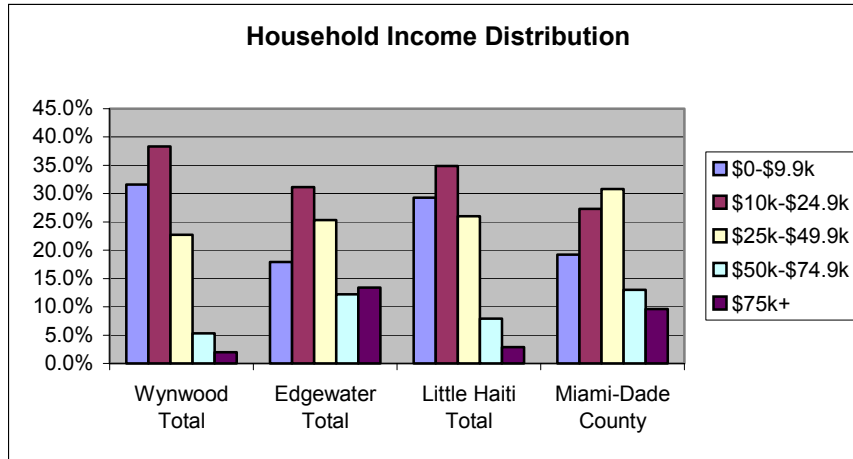
	Population		Households	
	1990	2000	1990	2000
<b>Wynwood</b>	6,850	6,578	2,014	1,749
<b>Edgewater</b>	24,920	29,415	10,332	10,959
<b>Little Haiti</b>	23,860	24,230	7,137	7,310
<b>TOTAL</b>	55,630	60,223	19,483	20,018
<b>Miami-Dade County</b>	1,937,094	2,253,362	692,355	776,774

### 2. Income

Data derived from the three sub-areas within the FEC corridor indicate relatively low-income levels. Wynwood and Little Haiti have particularly high percentages of households that earned less than \$10,000 annually.

#### 2000 Estimated Household Income Distribution

	\$0-\$9.9k	\$10k-\$24.9k	\$25k-\$49.9k	\$50k-\$74.9k	\$75k+
<b>Wynwood Total</b>	31.6%	38.3%	22.7%	5.3%	2.0%
<b>Edgewater Total</b>	17.9%	31.2%	25.3%	12.2%	13.4%
<b>Little Haiti Total</b>	29.3%	34.9%	26.0%	7.9%	2.9%
<b>Miami-Dade County</b>	19.2%	27.3%	30.8%	13.0%	9.6%



### 3. Age

All three neighborhood sub-areas within the FEC Corridor indicate a predominantly young population with the majority under the age of 18. In Little Haiti 37 percent of the population is under the age of 18. The area’s second most frequent age distribution, those between the ages of 18 and 34, represents more than 20 percent of the total population living in each neighborhood. In both Wynwood and Little Haiti over 50 percent (45 percent in Edgewater) of the population is under the age of 34. The young population is significant when compared to Miami Dade County where over 30 percent of the population falls within the 18-24 year range (the largest age group). The second most frequent age group is that under 18 years, comprising 25 percent of the population of Miami-Dade County. The FEC Corridor population is also young when compared to the City of Miami, which has an age distribution similar to that of Miami-Dade County (30 percent of the population is between 25 and 44 years and approximately 22 percent is under 18 years).

**2000 Population by Age Range Distribution in 3 FEC Areas<sup>1</sup>**

	0-17	18-34	35-44	45-54	55-64	65+	
Wynwood	35.3%	23.7%	14.2%	11.5%	7.5%	7.8%	100%
Edgewater	25.2%	20.2%	19.9%	15.5%	8.8%	10.5%	100%
Little Haiti	37.0%	21.0%	14.1%	13.2%	7.3%	7.4%	100%

<sup>1</sup> Miami-Dade County age statistics are presented under different age ranges and therefore are not applicable for this table.

#### 4. Education

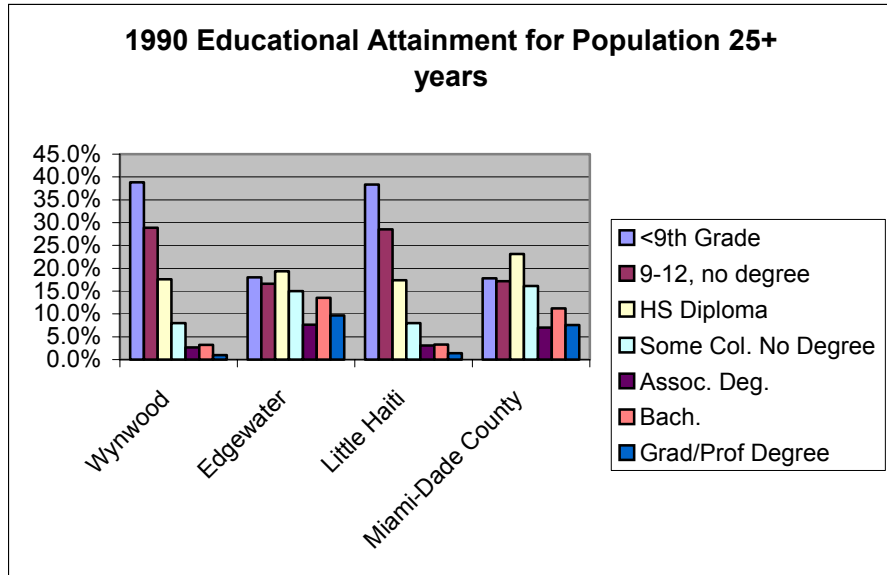
The most reliable current data for "Educational Attainment" is the 1990 U.S. Census of Population. According to the 1990 Census, educational attainment in the FEC corridor was very low, even when compared to Miami-Dade County as a whole.

**1990 Educational Attainment for Population 25+ Years**

	<9th Grade	9-12, no degree	HS Diploma	Some Col. No Degree	Assoc. Deg.	Bach.	Grad/Prof Degree
Wynwood	38.8%	28.9%	17.6%	8.0%	2.7%	3.2%	1.0%
Edgewater	18.0%	16.6%	19.4%	15.0%	7.7%	13.5%	9.6%
Little Haiti	38.3%	28.5%	17.4%	8.0%	3.1%	3.3%	1.4%
Miami-Dade County	17.8%	17.2%	23.1%	16.1%	7.0%	11.2%	7.6%

At the lowest extreme is Wynwood, where almost 40 percent of the over-25 population had less than a 9<sup>th</sup> grade education. Additionally, only 17 percent had a high school diploma and only 3.2 percent had a Bachelors degree. Educational attainment in the Little Haiti census tracts (the largest section of the FEC Corridor area) was nearly identical. The Edgewater area of the corridor is considerably better with only 18 percent of the population having less than a 9<sup>th</sup> grade education. In Edgewater, almost 20 percent of the population had a high school diploma and 13.5 percent had a Bachelors degree. Compared to Miami-Dade County, Wynwood and Little Haiti were considerably less educated, while Edgewater housed a rather well educated population. Figures show a larger percentage of the county's population had a high school diploma (23 percent) with over 11 percent of the population with a Bachelor's degree. The following graph illustrates this disparity:





## 5. Schools

There are a total of nine public schools located within the FEC Corridor area for which data is available: six elementary schools, one middle school and two high schools. All of the schools were rated as “D” schools except for the Design & Architectural Magnet High School, which is rated “A”. School grades are a composite of the percent of students attaining scores above the FCAT level 3 in reading, math and writing, the percent of eligible students tested for the FCAT, as well as the percent of students maintaining or advancing in the level attained on the FCAT. The school grade reflects the aggregate academic achievement level of the students in each school. A comparison of the level of the other schools in Miami-Dade County is provided. The low performance of many of the schools in the County, however, does not diminish the fact that all but the magnet high school in the FEC Corridor had the lowest possible score. There were no “F” schools listed for the 2001 school year.

One of the telling statistics about the schools is that there is a considerably higher than average rate of free and reduced lunch utilization in the FEC Corridor schools than in Miami-Dade County: in most cases above 95 percent in the FEC versus an average of 56 percent in the County as a whole. This is an indicator of the poverty level of the area. Another telling statistic is the percentage of students in the FEC Corridor considered gifted is significantly smaller than in the County. Another area where FEC schools are at a disadvantage is with the higher than average concentration of students with limited English proficiency. A language barrier can have

a tremendous impact on the quality of education that all students in the school receive not just those who are not proficient in English. A final note is that teachers holding advanced degrees and their years of experience are roughly average at the high school level, but at the middle and elementary school level, the teachers were considerably below the norm.

All of these factors contribute to a less than adequate education for children living in the FEC Corridor neighborhoods. Without adequate education, the skill level of the local community will not satisfy the requirements of potential employers. Therefore, improvements in the education level are mandatory for overall economic development.

<b>FEC Corridor Elementary Schools</b>	<b>% Free/Reduc. Lunch</b>	<b>% Gifted</b>	<b>Limited English Prof.</b>	<b>%Teachers w/Adv. Degree</b>	<b>Teacher Exp.</b>	<b>School Grade</b>
<i>Edison Park Elementary</i>	97.3	1.9	18.2	40	16.2	D
<i>Little River Elementary</i>	99.2	0.3	23.6	39.2	11.1	D
<i>Morningside Elementary</i>	95	3.1	40.7	50	12.3	D
<i>Shadowlawn Elementary</i>	95.6	2.7	29	37.8	9.1	D
<i>Toussaint L'ouverture Elem.</i>	97.6		34.5	46.8	7.8	D
<b>District (M-D Co.)</b>	<b>56.2</b>	<b>10.3</b>	<b>1.5</b>	<b>50.8</b>	<b>14.4</b>	<b>32%@ D</b>

Source: Florida Department of Education, 2001 Florida School Indicators Report, <http://info.doe.state.fl.us/fsir/>

The most frequent (mode) grade for the Miami-Dade elementary schools was a “D”  
 25% (50/203) of the elementary schools were ranked “A”  
 9% (19/203) of the elementary schools were ranked “B”  
 32% (64/203) of the elementary schools were ranked “C”  
 32% (65/203) of the elementary schools were ranked “D”  
 2% (5/203) of the elementary schools were not ranked

<b>FEC Corridor Middle Schools</b>	<b>Teachers w/Adv. Degree</b>	<b>Mean Years Teacher Experience</b>	<b>%Limited English Prof</b>	<b>School Grade</b>
<i>Miami Edison Middle School</i>	35.5	11.2	11.9	D
<b>District (M-D Co.)</b>	<b>60.1</b>	<b>14.4</b>	<b>1.8</b>	<b>49%@C</b>

Source: Florida Department of Education, 2001 Florida School Indicators Report, <http://info.doe.state.fl.us/fsir/>

The most frequent (mode) grade for the Miami-Dade middle schools was a “C”  
 7% (4/61) of the middle schools were ranked “A”  
 3% (2/61) of the middle schools were ranked “B”  
 49% (30/61) of the middle schools were ranked “C”  
 28% (17/61) of the middle schools were ranked “D”  
 13% (8/61) of the middle schools were not ranked

**FEC Corridor  
High Schools**

*Design & Architectural  
Magnet School*

*Miami Edison  
Senior High School*

**District (M-D Co.)**

	% with Disabilities	Drop-out Rate	% Limited English Prof	Teachers w/Adv. Degree	Mean Years Teacher Experience	School Grade
<i>Design &amp; Architectural Magnet School</i>	4.1	0.2	1.5	53.2	13.9	A
<i>Miami Edison Senior High School</i>	10.9	8.5	25.4	50	12.3	D
<b>District (M-D Co.)</b>	<b>15.2</b>	<b>6.1</b>	<b>1.2</b>	50.8	14.4	<b>43%@D</b>

Source: Florida Department of Education, 2001 Florida School Indicators Report, <http://info.doe.state.fl.us/fsir/>

The most frequent (mode) grade for the Miami-Dade high schools was a “D”

11% (4/35) of the high schools were ranked “A”

3% (1/35) of the high schools were ranked “B”

37% (13/35) of the high schools were ranked “C”

43% (15/35) of the high schools were ranked “D”

6% (2/35) of the high schools were not ranked

**After High School**

**FEC Corridor  
High Schools**

*Design & Architectural  
Magnet School*

*Miami Edison  
Senior High School*

**District (M-D Co.)**

	% Who Continued Education	% Continued Ed. Employed	% Employed FT&PT	% Employed PT	% Graduation Rate
<i>Design &amp; Architectural Magnet School</i>	59.5	55.1	41.4	83.3	92.9
<i>Miami Edison Senior High School</i>	44.9	68.5	60.2	73.2	41.2
<b>District (M-D Co.)</b>	<b>55.2</b>	<b>57.1</b>	<b>50.8</b>	<b>67.2</b>	<b>53.9</b>

Source: Florida Department of Education, 2001 Florida School Indicators Report, <http://info.doe.state.fl.us/fsir/>

## II. Miami Market Profile

### A. Commercial/Office Market

Based on discussions with commercial realtors in the area, the FEC Corridor is being significantly impacted by a saturated Miami Beach commercial real estate market. The corridor's Design District has been the focus of "Beach" activity" for the past decade. However, following a market downturn in the mid-90s, the Design District and neighboring locations within Wynwood's fashion area and Little Haiti's NE 62<sup>nd</sup> Street to 4<sup>th</sup> Court area are experiencing a surge in Beach investment.

The median acquisition cost of commercial space in the FEC corridor is currently \$11-\$12 per square foot. Commercial space is highest in the Design District (\$14-\$15) and along Biscayne Boulevard (\$20-\$21). Industrial space within the corridor currently sells in the \$8-\$9 range. The median lease rate in the North Miami area (including the FEC corridor) is currently \$17.50 per square foot compared to \$26.00 per square foot in Miami Beach. Many commercial properties in the FEC corridor currently lease in the \$12-\$15 per square foot range. Industrial rents in the Wynwood fashion district are generally in the \$5-\$7 range.

Detailed tables listing the commercial/office sub-market of the North Miami area, including the FEC Corridor, Miami Beach, and Airport West sub-markets, are located in Appendix I.

### B. Commercial Real Estate

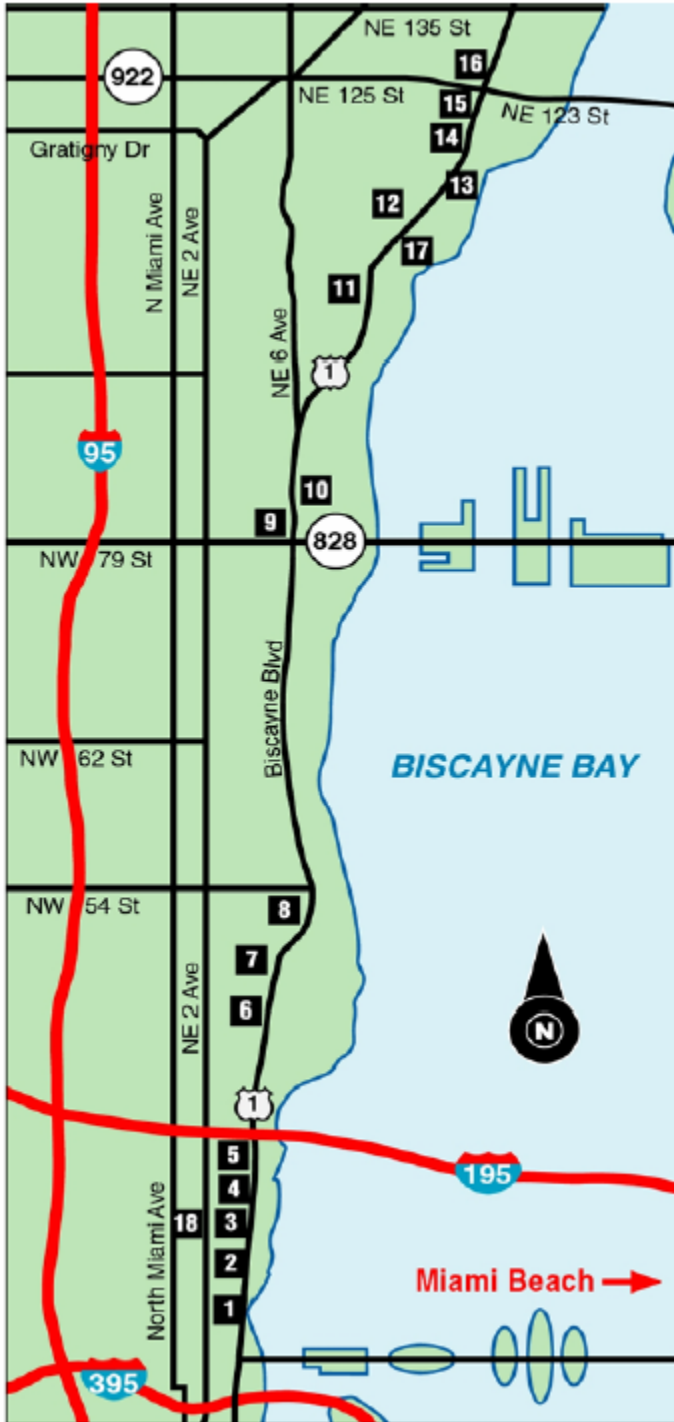
**North Miami\* Office Space Third Quarter 2001**

	Total Rentable Space (sq. ft.)	Total Vacant Space (sq. ft.)	Occupancy Rate (%)	Current Absorption (sq. ft.)	Annual Absorption (sq. ft.)	Rental Rate	Change since 3 <sup>rd</sup> Quarter 2000
<b>Class A</b>	536,000	51,855	90.33%	-11,112	-42,255	\$27.87	-2.72%
<b>Class B</b>	1,076,045	193,692	82.00%	-12,932	-77,271	\$18.89	3.85%
<b>Class C</b>	348,040	29,784	91.44%	6,639	-184	\$17.08	8.51%
<b>Totals</b>	<b>1,960,085</b>	<b>275,331</b>	<b>85.95%</b>	<b>-17,405</b>	<b>-119,710</b>	<b>\$21.03</b>	<b>1.99%</b>

Source: RealData Information Systems, Inc. Third Quarter 2001 Report

\*The North Miami office market covers Biscayne Boulevard from the Miami CBD north to Aventura.

# BISCAYNE BOULEVARD



- Existing
- Under Construction
- Proposed

**Class B Building #'s on the Biscayne Boulevard map**

	<b>Address</b>	<b>Year Built</b>	<b>Total Rentable Space</b>	<b>Total Vacant Space</b>	<b>% Occ.</b>	<b>Current Abs.</b>	<b>Lowest Quoted Rent Rate</b>	<b>Highest Quoted Rent Rate</b>	<b>Mean Rent Rate</b>
<b>#1 Boulevard Center</b>	1444 Biscayne Blvd	1973	117,781	59,000	49.91%	-6,000	\$21.00	\$25.00	\$23.00
<b>#8 BayPoint Office Tower</b>	4770 Biscayne Blvd	1983	134,5000	20,000	85.13%	4,000	\$18.00	#22.00	\$20.00

**Class C Building #'s on the Biscayne Boulevard map**

	<b>Address</b>	<b>Year Built</b>	<b>Total Rentable Space</b>	<b>Total Vacant Space</b>	<b>% Occ.</b>	<b>Current Abs.</b>	<b>Lowest Quoted Rent Rate</b>	<b>Highest Quoted Rent Rate</b>	<b>Mean Rent Rate</b>
<b>#5 Capital Bank</b>	35550 Biscayne Blvd.	1975	47,000	4,367	90.71%	2,256	\$18.25	\$24.00	\$21.13
<b>#3 Executive Plaza 3000</b>	3000 Biscayne Blvd.	1969	57,000	0	100%	0	\$11.00	\$13.00	\$12.00
<b>#7 Atrium Biscayne</b>	4500 Biscayne Blvd.	1973	65,000	10,700	83.54%	0	\$17.50	\$22.00	\$19.75
<b>#4 South Trust Exec. Plaza</b>	3050Biscayn e Blvd	1973	86,040	6,100	92.91%	5,000	\$18.00	\$20.00	\$19,00

The market occupancy rate in North Miami stands at about 86 percent with 275,330 square feet available, with an additional 12,200 square feet in sublease space. Rental rates have increase by almost two percent over this time last year. Speculative development will increase during the current decade. Increases in international trade will encourage international businesses to locate offices in Miami. A careful eye will be kept on the international financial markets and the economic conditions of Latin American countries. The regional economy is expected to grow at a rate of two percent annually or greater over the next few years. Many of the sub-markets will experience growth greater than that of Miami's Central Business District (CBD), as Dade County's growth trend continues toward the west and north of the city.

### Industrial Market

	Total Space (sq. ft.)	Vacant Space (sq. ft.)	Vacancy Rate (%)	Under Construction (sq. ft.)	Net. Absorption (sq. ft.)	Gross Lease (\$/sq. ft./yr)
<b>Central City</b>	62,500.0	4,687.5	7.5	0	-917.5	2.35-3.35
<b>Suburban</b>	94,800.0	4,929.6	5.2	1,950.0	1,770.4	5.65-7.65

*Source: Society of Industrial and Office Realtors, 1999 Comparative Statistics of Industrial and Office Real Estate Markets*

New construction was expected to decrease in 1999 by one to five percent, which was considered timely because of the nearly two million square feet of additions during 1998. However, the shortage of buildings sized 100,000 square feet and larger was expected to encourage new construction in that market segment. Many organizations unable to locate such space in 1998 were still shopping in 1999. Increases in site prices will make it more difficult to locate 'ready to go' land. Residential development in the Airport West area is expected to blur district boundaries of office and industrial space. Increases in warehouse/distribution prices are also anticipated. These increases could reach five percent. Lease prices for this space were also expected to increase by up to five percent. Absorption levels are expected to remain constant.

### Retail Market

Shopping Center Inventory (sq. ft.)	Shopping Center Construction (sq. ft.)	Construction as a Percent (%)	Torto Wheaton Rent Index* (\$/sq. ft.)
32,943.0	853.0	2.6	14.37

*\*Index is based on a model that predicts what the average rent should be for leases with certain characteristics, in certain locations during certain years.*

Retail trade is one of Miami's most important sectors. Retail accounts for 27 percent of the area's jobs, buoyed by the strength of the tourism industry. The economic impact of tourism is estimated to be \$13.5 billion. The demographics of Miami's millions of visitors have been changing. In 1989, 61 percent of the area's tourists were Americans; in 1996, an estimated 61 percent were foreign. Miami's retail vacancy rate has stabilized, while the rent index rose 4 percent. Shopping center completions remained robust at 850,000 square feet, with that rate expected to continue through 2000 (*Source: National Association of Realtors, 1997-1998 Market Conditions Report*).

## C. Employment and Industry

### 1. Labor Force

The 1990 labor force distribution for the neighborhood sub-areas within the FEC corridor is similar to that of Miami-Dade County where approximately three quarters of the labor force, mostly male, are employed.

#### 1990 Population of 16+ Age Group in Labor Force

	Employed Male	Employed Female	Unemployed Persons	Armed Forces
Wynwood	50.0%	33.0%	16.5%	0.4%
Edgewater	52.0%	37.1%	10.8%	0.1%
Little Haiti	44.7%	35.9%	19.4%	0.0%
Miami-Dade County	49.6%	42.30%	7.60%	0.60%

#### Labor Force and Employment: 1998 to 1999

	Civilian Labor Force			Unemployed/Rate		
	June 1998	June 1999	%Change	June 1998	June 1999	%Change
<b>City</b>	182,111	182,322	+0.12%	18,147/10.0	16,663/9.1	-0.9%
<b>MSA</b>	1,048,759	1,052,937	+0.4%	72391/6.9	66471/6.3	-0.6%
<b>State</b>	7,281,078	7,440,963	+2.2%	335109/4.6	309389/4.2	-0.4%
<b>U.S.</b>	137,453,000	139,358,000	+1.4	6,216,000/4.5	5,943,000/4.3	-0.2%

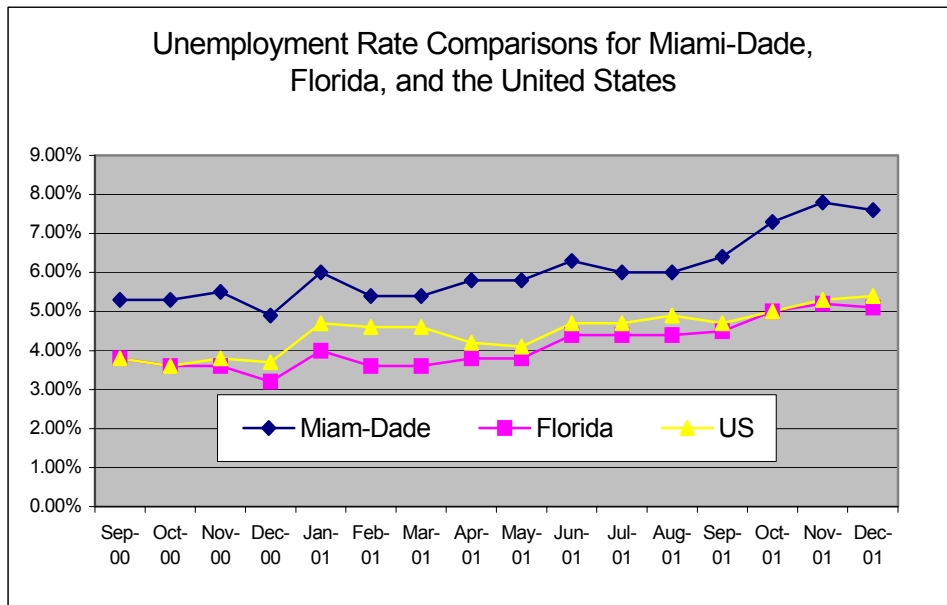
Source: Bureau of Labor Statistics, U.S. Department of Labor, <http://www.bls.gov/data/home.htm>



### Labor Force and Unemployment: 2000 to 2001

	Civilian Labor Force			Unemployed/Rate		
	June 2000	June 2001	%Change	June 2000	June 2001	%Change
<b>City</b>	183,380	190,148	+3.7%	14,941/8.1	17,398/9.1	+1.0%
<b>MSA</b>	1,062,622	1,098,089	+3.3%	59,650/5.6	69,403/6.3	+0.7%
<b>State</b>	7,524,753	7,713,647	+2.5%	291,782/3.9	379,280/4.9	+1.0%
<b>U.S.</b>	140,837,000	141,468,000	+0.4%	5602000/4.0	6465000/4.6	+0.6%

Source: Bureau of Labor Statistics, U.S. Department of Labor, <http://www.bls.gov/data/home.htm>



Source: State of Florida, Agency for workforce Innovation, and Miami-Dade County Department of Finance

### Occupational Employment Projections: 1996-2006

Occupations Expected to Have The Largest Job Growth	Fast-Growing Occupations (ranked by percent growth)
1. Cashiers	1. Systems analysts
2. Salespersons, retail	2. Physical therapy assistants/aides
3. General managers & top executives	3. Desktop publishers
4. Registered nurses	4. Home health aides
5. Waiters and waitresses	5. Computer Engineers
6. Marketing & sales, supervisors	6. Medical assistants
7. Janitors/cleaners/maids	7. Physical Therapists
8. General office clerks	8. Paralegals
9. Food preparation	9. Emergency medical techs.
10. Hand packers & packagers	10. Occupational therapists

*Source: U.S. Department of Labor, Employment and Training Administration, America's Labor market information System (ALMIS)*

## ***2. Effective Buying Income***

Effective buying income is one way of gauging the economic health of a community. The negative effects of the economic downturn that began in the year 2000 along with the 9-11 terrorism attack on the World Trade Center did not impact the economy of the Miami-Dade area in a uniform manner. Between 2000 and 2001 the total effective buying income (see definition and source below) in Miami-Dade County rose significantly in two cities: North Miami (19.6 percent) and Hialeah (4.1 percent). These increases correspond with and explain the increase in population in these areas, 19.2 percent and 4.5 percent respectively.

When the effective buying income is translated into a buying power index, the increase in population appears to provide the best explanation for the increases registered in only these two areas (North Miami 8 percent, Hialeah 5.5 percent). In fact, the three areas that lost population –

Coral Gables, Miami, and Miami Beach – all had significant decreases in buying power. The increase in population also resulted in an increase in total retail sales.

It is important to note that there are neighborhoods in Miami-Dade County that are growing even in difficult economic times. It is also important to note that in areas where there is growth in population and increased buying power there is also increased opportunity to expand the economic base to support these growing communities.

**Effective Buying Income (EBI)** is the measurement of income developed exclusively by *Sales & Marketing Management* to distinguish it from other sources reporting income statistics, EBI is defined as money income less personal tax and non-tax payments – a number often referred to as “disposable” or “after-tax” income. Income and all income-related fields are benchmarked to the 1990 Census.

Money income is the aggregate of wages and salaries, net farm and non-farm self-employment income, interest, dividends, net rental and royalty income, Social Security and railroad retirement income, other retirement and disability income, public assistance income, unemployment compensation, Veterans Administration payments, alimony and child support, military family allotments, net winnings from gambling, and other periodic income.

Deducted from this total money income are personal income taxes (federal, state, local), personal contributions to social insurance (Social Security and federal retirement payroll deductions), and taxes on owner-occupied non-business real estate.

Receipts from the following sources are not included as money income: money received from the sale of property (unless the recipient is engaged in the business of selling property); the value of income “in kind” from food stamps, public housing subsidies, medical care, employer contributions for persons, etc.; withdrawal of bank deposits; money borrowed; tax refunds; exchange of money between relatives living in the same household; gifts and lump-sum inheritances, insurance payments, and other types of lump-sum receipts.

**Buying Power index (BPI)** is a weighted index that covers *Survey of Buying Power’s* three basic elements – population (the demographic factor), Effective Buying Income (the economic factor), and retail sales (the distribution factor) – into a measurement of a market’s “ability to buy,” expressing it as a percentage of the national total (100.0000%). The country’s (or other market’s) share of the U.S. total of each of these elements is multiplied by a fractional

weight: .5 times the percent of U.S. Effective Buying Income, .3 times the percent of U. S. retail sales, and .2 times the percent of U.S. population. The sum of these weighted percents is the BPI.

Source: *SMM/SALES & MARKETING MANAGEMENT 2001, p. 184*

### Effective Buying Income 2000

	Total EBI (\$000)	Median Household EBI	% of Hds. EBI \$20,000-\$34,999	% of Hds. EBI \$35,000-\$49,999	% of Hds. EBI \$50,000+	Buying Power Index
MIAMI-DADE	33,676,219	31,045	21.8	15.9	29.1	.7409
CORAL GABLES	1,442,972	53,150	15.0	13.2	53.0	.0276
HIALEAH	2,290,408	26,339	26.6	15.8	20.1	.0586
MIAMI	4,112,220	21,023	20.8	11.5	19.4	.1149
MIAMI BEACH	1,697,227	17,960	18.7	9.2	17.8	.0361
NORTH MIAMI	738,457	24,406	27.5	15.2	16.8	.0163
MIAMI-FT. LAUDERDALE CONSOLIDATED AREA	64,417,291	33,310	22.3	16.6	31.2	1.4103

Source: *SMM/Sales & Marketing Management 2001, September 2000; September 2001.*

### Effective Buying Income 2001

	Total EBI (\$000)	Median Household EBI	% of Hds. EBI \$20,000-\$34,999	% of Hds. EBI \$35,000-\$49,999	% of Hds. EBI \$50,000+	Buying Power Index
MIAMI-DADE	35,845,325	32,330	21.6	15.5	31.1	.7247
CORAL GABLES	1,444,068	53,839	15.1	12.8	53.4	.0212
HIALEAH	2,385,243	26,724	26.3	15.1	21.5	.0618
MIAMI	4,147,775	22,375	20.2	11.2	22.5	.1002
MIAMI BEACH	1,644,477	18,809	18.7	9.0	19.8	.0302
NORTH MIAMI	882,902	24,170	27.4	14.4	17.2	.0176
MIAMI-FT. LAUDERDALE CONSOLIDATED AREA	69,463,148	34,673	21.9	16.2	33.4	1.3781

Source: *SMM/Sales & Marketing Management 2001, September 2000; September 2001.*

### Effective Buying Income % Change from 2000 to 2001

	Total EBI (\$000)	Median Household EBI	% of Hds. EBI \$20,000-\$34,999	% of Hds. EBI \$35,000-\$49,999	% of Hds. EBI \$50,000+	Buying Power Index
<b>MIAMI-DADE</b>	6.44%	4.14%	-0.92%	-2.52%	6.87%	-2.19%
<b>CORAL GABLES</b>	0.08%	1.30%	0.67%	-3.03%	0.75%	-23.19%
<b>HIALEAH</b>	4.14%	1.46%	-1.13%	-4.43%	6.97%	5.46%
<b>MIAMI</b>	0.86%	6.43%	-2.88%	-2.61%	15.98%	-12.79%
<b>MIAMI BEACH</b>	-3.11%	4.73%	0.00%	-2.17%	11.24%	-16.34%
<b>NORTH MIAMI</b>	19.56%	-0.97%	-0.36%	-5.26%	2.38%	7.98%
<b>MIAMI-FT. LAUDERDALE CONSOLIDATED AREA</b>	7.83%	4.09%	-1.79%	-2.41%	7.05%	-2.28%

Source: *SMM/Sales & Marketing Management 2001, September 2000; September 2001.*

### Population and Retail Sales 2000

	Total Population (000s)	% age 18-24	% age 25-34	% age 35-49	% age 50+	Households (000s)	Total Retail Sales
<b>MIAMI-DADE</b>	2,181.4	8.4	13.8	22.6	31.1	773.5	26,897,557
<b>CORAL GABLES</b>	45.3	16.8	10.8	22.1	35.1	17.0	1,078,415
<b>HIALEAH</b>	222.5	8.1	12.2	20.6	35.8	68.1	2,134,530
<b>MIAMI</b>	365.6	7.8	12.6	20.4	37.1	132.5	5,213,297
<b>MIAMI BEACH</b>	93.2	6.3	12.3	18.9	49.2	48.9	1,723,013
<b>NORTH MIAMI</b>	53.1	8.5	14.7	25.6	27.4	19.8	536,648
<b>MIAMI-FT. LAUDERDALE CONSOLIDATED AREA</b>	3,730.3	7.8	13.8	22.6	33.2	1,433.1	53,715,887

Source: *SMM/Sales & Marketing Management 2001, September 2000; September 2001.*

### Population and Retail Sales 2001

	Total Population (000s)	% age 18-24	% age 25-34	% age 35-49	% age 50+	Households (000s)	Total Retail Sales
<b>MIAMI-DADE</b>	2,277.1	8.5	13.4	22.5	34.6	808.6	27,024,621
<b>CORAL GABLES</b>	43.9	17.6	10.1	21.5	36.6	16.5	528,620
<b>HIALEAH</b>	232.4	8.1	11.6	20.5	36.9	70.4	2,761,274
<b>MIAMI</b>	355.9	7.6	11.2	19.8	40.3	130.5	4,330,122
<b>MIAMI BEACH</b>	88.4	6.4	11.0	18.4	51.3	45.7	1,011,932
<b>NORTH MIAMI</b>	63.3	8.7	15.5	24.1	24.0	23.7	574,239
<b>MIAMI-FT. LAUDERDALE CONSOLIDATED AREA</b>	3,927.7	7.8	13.4	22.5	33.8	1,512.3	53,343,652

Source: *SMM/Sales &Marketing Management 2001, September 2000; September 2001.*

### Population and Retail Sales % Change from 2000 to 2001

	Total Population (000s)	% age 18-24	% age 25-34	% age 35-49	% age 50+	Households (000s)	Total Retail Sales
<b>MIAMI-DADE</b>	4.39%	1.19%	-2.90%	-0.44%	11.25%	4.54%	0.47%
<b>CORAL GABLES</b>	-3.09%	4.76%	-6.48%	-2.71%	4.27%	-2.94%	-50.98%
<b>HIALEAH</b>	4.45%	0.00%	-4.92%	-0.49%	3.07%	3.38%	29.36%
<b>MIAMI</b>	-2.65%	-2.56%	-11.11%	-2.94%	8.63%	-1.51%	-16.94%
<b>MIAMI BEACH</b>	-5.15%	1.59%	-10.57%	-2.65%	4.27%	-6.54%	-41.27%
<b>NORTH MIAMI</b>	19.21%	2.35%	5.44%	-5.86%	-12.41%	19.70%	7.00%
<b>MIAMI-FT. LAUDERDALE CONSOLIDATED AREA</b>	5.29%	0.00%	-2.90%	-0.44%	1.81%	5.53%	-0.69%

Source: *SMM/Sales &Marketing Management 2001, September 2000; September 2001.*

Buying power depends on labor availability and the employment of individuals living in an area. The area of greatest employment is the service sector followed by trade, retail and government, all of which have experienced increases in employment. According to the following

table, the manufacturing sector provides only about ten percent of the jobs available in the Miami MSA. The number of manufacturing jobs declined by almost 2.75 percent over a period of one year. The Florida Agency for Workforce Innovation predicts an annual decline in this sector of one percent per year to the Year 2009. This projection may not be based on demand as much as on the reality that the land zoned for manufacturing/industry is being developed for other uses such as commercial and wholesale/retail. As indicated below, manufacturing provides more jobs per business in the industrially zoned zip code areas of the FEC Corridor than wholesale trade, which employs the majority of the workers. Additionally, manufacturing jobs do not require as much education as service, retail and government jobs. There are definite advantages to encouraging the manufacturing sector since Miami-Dade continually experiences higher unemployment rates than the state or the nation. The statistics on education support the notion that this area has an under educated population beset with poor schools and poor graduation rates. Given this condition, the occupations that local residents would be qualified for among the fastest and largest growing jobs are waiter/waitress, janitors, cleaners, maids, and home health care workers. All of these jobs are in the service sectors that do not require advanced education. However, considering that many of the residents of the area do not have English as their first language, service sector jobs can still be problematic.

### Total Non-Farm Employment In Miami MSA

NAICS Description	June 2000	May 2001	June 2001
Total Non-farm	1,020,000	1,039,800	1,042,200
Goods Producing	107,500	106,100	106,300
Mining	500	500	500
Construction	37,800	38,200	38,500
Manufacturing	69,200	67,400	67,300
Durable Goods	33,700	33,100	33,100
<i>Furniture/Fixtures</i>	3,600	3,500	3,600
<i>Fabricated Metal</i>	4,300	4,400	4,400
<i>Mach &amp; Elec. Eqp.</i>	6,300	5,900	5,800
<i>Transportation Eqp.</i>	5,300	5,100	5,100
Non Durable Goods	35,500	34,300	34,200
<i>Food Products</i>	5,200	4,900	4,900
<i>Apparel</i>	9,300	9,100	9,100
<i>Printing/Publish.</i>	10,200	10,100	10,100
Service Producing	912,500	933,700	935,900
Transportation/P.U.	91,800	95,000	95,400
<i>Trucking/Warehouse</i>	9,600	9,700	9,700
<i>Transportation/Air</i>	32,800	34,200	34,400
Communications/Utilities	22,800	23,800	24,000
Trade	260,900	261,900	263,200
Wholesale Trade	83,500	85,700	86,300
Retail Trade	177,400	176,200	176,900
<i>Building Materials/Garden Supplies</i>	5,100	4,900	4,900
<i>Gen. Merchandise</i>	16,600	16,700	16,700
<i>Food Stores</i>	34,000	33,800	34,400
<i>Auto Dealers</i>	15,900	15,700	15,800
<i>Apparel/Access.</i>	14,400	14,400	14,400
<i>Furniture &amp; Equipment.</i>	9,500	9,100	9,100
<i>Eating/Drinking</i>	56,500	56,100	56,100
<i>Misc Retail</i>	25,400	25,500	25,500
Finance, Ins., Real Est.	66,600	67,400	67,900
<i>Depository Institutions</i>	18,500	18,700	18,800
<i>Real Estate</i>	20,500	20,700	21,000
Services	349,300	362,400	363,600
<i>Hotels/Lodging</i>	22,400	24,400	24,000
<i>Personal Services</i>	11,800	12,500	12,300
<i>Business Services</i>	95,100	102,800	103,000
<i>Amusement/Rec.</i>	11,700	10,900	11,100
<i>Health Services</i>	82,500	83,000	83,600
Total Government	143,900	147,000	145,800
Total Federal Govt.	19,800	18,500	18,400
<b>Total State/Local</b>	<b>124,100</b>	<b>128,500</b>	<b>127,400</b>
<b>Total State</b>	<b>19,200</b>	<b>19,800</b>	<b>18,900</b>
<b>Total Local</b>	<b>104,900</b>	<b>108,700</b>	<b>108,500</b>



### 3. *Industrial Establishments (Using zip codes 33127 and 33137)*

The following table depicts the major industries within the FEC corridor using census data by zip codes (33127 and 33137) from 2000 census estimates (the most recent data available that most accurately represents the FEC Corridor). The table only lists industries that exceed 5 percent of total in each category.

#### Major Industrial Sectors within FEC Corridor

	% Establishments	% Employees	% Sales Vol.
Retail Trade	15.4%	7.0%	4.6%
Wholesale Trade	14.1%	11.8%	37.3%
Other Services	12.4%	6.6%	2.7%
Professional, Scientific, & Technical	10.2%	6.6%	3.5%
Not Classified	9.9%	7.1%	2.8%
Manufacturing	7.0%	12.0%	30.6%
Healthcare and Social Assistance	5.9%	12.4%	3.5%
Accommodation & Food Services	4.5%	2.6%	0.5%
Admin/Support/Waste Mgmt/Remediation	3.3%	6.9%	1.0%
Educational Services	1.6%	12.3%	3.9%
Totals numbers	2285	22611	3582.5

*2000 Census data estimates for Zip Codes 33127 and 33137*

Retail and wholesale trade have the highest percentages of establishments within the major FEC zip codes, while manufacturing, health care/social assistance, educational services and wholesale trade employ the most people (each account for approximately 12 percent of total employees).

Sales volumes in the wholesale trade and manufacturing industries surpass other industries by a large margin. Wholesale trade generates over 37 percent of the total sales volume with manufacturing generating 30.6 percent of the total sales volume. The next highest sales volume is in the retail trade industry with only 4.6 percent.

### Sales Volume Profile of Industries within the 33127 Zip Code

Zip code: 33127	Total Sales (\$millions)	%Total Sales	# of establishments < \$5 million	# of establishments > \$5 million*	Total # of Establishments*
Wholesale Trade	484.2	45.8%	161	15	198
Manufacturing	202.7	19.2%	88	9	105
Finance and Insurance	77.8	7.4%	10	1	13
Retail Trade	69.1	6.5%	180	0	196
Construction	52.2	4.9%	35	2	42
Healthcare and Social Assistance	36.1	3.4%	56	2	66
Not Classified	35.7	3.4%	103	1	112
Other Services	28.7	2.7%	176	0	188
Professional, Scientific, & Technical	18.8	1.8%	24	1	33
Admin/Support/Waste Mgmt	14.9	1.4%	32	0	35
Educational Services	8.9	0.8%	9	0	21
Accommodation & Food Services	8.2	0.8%	20	1	51
Transportation and Warehousing	6.4	0.6%	23	0	26
Mining	5.4	0.5%	0	1	1
Real Estate & Renting & Leasing	3.8	0.4%	22	0	23
Information	2	0.2%	6	0	7
Art, Entertainment & Recreation	1.6	0.2%	5	0	6
Public Administration	0	0.0%	0	0	6
Agriculture/Forestry/fishing and hunting	0	0.0%	0	0	0
Utilities	0	0.0%	0	0	0
Management of Companies & Enterprises	0	0.0%	0	0	0
<b>Totals</b>	<b>1056.5</b>	<b>100.0%</b>	<b>950</b>		<b>1129</b>

*\*This is a subtotal adjusted by excluding those establishments with no data.*

Under the 33127 Zip Code heading, wholesale trade is the major industry in terms of sales volume. The wholesale trade industry generates \$484.2 million or 45.8 percent of total sales

volume with a large majority of wholesale establishments making less than \$5 million. In fact, most of the wholesale establishments sell less than \$5 million and only 15 of 198 establishments exceed \$5 million in sales. This indicates a high volume of small wholesale business, (perhaps family-run or ‘mom & pop’) establishments within the 33127 Zip Code. This is supported by employment data that shows most of these wholesale industries employ fewer than 100 people.

The distribution of industry sales volumes in the 33127 Zip Code parallels those in the neighboring 33137 Zip Code area within the FEC corridor. However, there is a larger sales volume in the top industries (manufacturing and wholesale trade) with fewer establishments whose sales exceed \$5 million. The following table lists the top 5 industries in the 33137 zip code area.

**Sales Volume Profile of select Industries within the 33137 Zip Code**

Zip code: 33137	Total Sales (\$millions)	%Total Sales	# of establishments < \$5 million	# of establishments > \$5 million*	Total establishments
Manufacturing	894.2	35.4%	35	5	124
Wholesale Trade	852.3	33.7%	103	10	155
Retail Trade	97.2	3.8%	136	3	17
Professional, Scientific	107.5	4.3%	177	3	200
Educational Services	131.1	5.2%	9	3	16

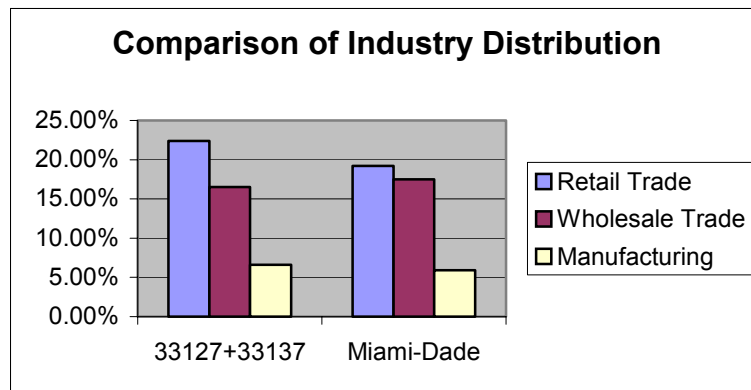
Comparisons made to Miami-Dade County industrial activity are derived from 1997 census data. The following table presents percentages from three of the major industrial sectors: Retail Trade, Wholesale Trade, and Manufacturing.

### Comparison of Select Industries

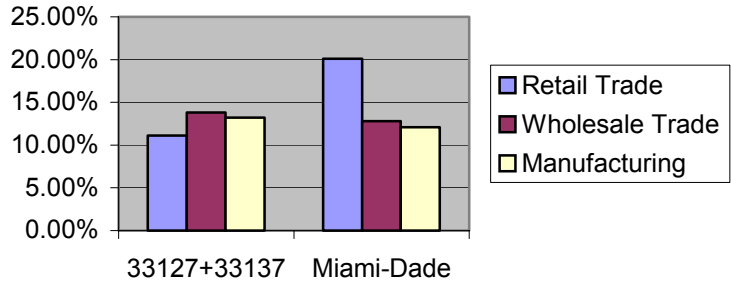
	Establishments		Employees		Sales	
	33127+33137	Miami-Dade	33127+33137	Miami-Dade	33127+33137	Miami-Dade
Retail Trade	22.40%	19.20%	11.10%	20.10%	6.50%	22.20%
Wholesale Trade	16.50%	17.50%	13.80%	12.80%	28.10%	28.10%
Manufacturing	6.60%	5.90%	13.20%	12.10%	38.80%	9.10%

Proportionally, industries in the FEC corridor zip codes and Miami-Dade County are similar. However, the retail trade industry in Miami-Dade County has a higher percentage of employees than the FEC corridor zip codes. Moreover, the number of establishments is not representative of employment and total sales in the industry.

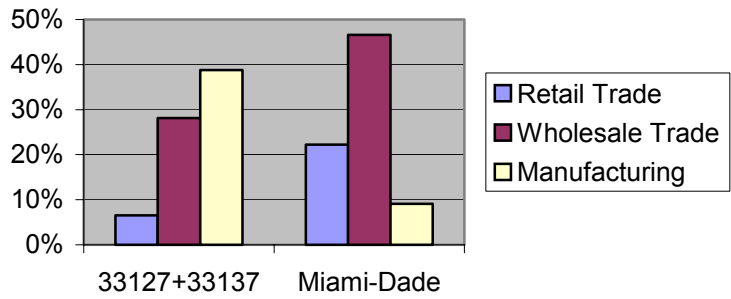
The following three graphs illustrate these industry sector comparisons.



### Comparison of Employee Distribution



### Comparison of Sales Distribution



## D. Miami's Manufacturing Sector

According to the U.S. Economic Census, the Miami Primary Statistical Metropolitan Area (PMSA) has experienced a steady decline in its overall manufacturing base. Miami-Dade shed nearly 19,000 manufacturing jobs between 1977-1997. New growth (1992-1997) in manufacturing establishments occurred in Fabricated Metals, Food Products, Furniture and Medical Instruments. Significant job growth occurred in only Fabricated Metals and Furniture Production.

### Historical Manufacturing Statistics for Miami, FL PMSA (1977-1997)

	Total Firms	> than 20 Emp.	Total Emp. (1000)	Payroll (millions)	Production Workers (1000)	Production Worker Wages (millions)	Value added by Manufacturing (millions)	New Capital Expenditures (millions)	Value of Shipments (millions)
1977	3,410	888	85.1	812.8	65.8	509.2	1797.5	112.3	3,546.0
1982	3,394	977	98.4	1,389.5	68.5	757.3	2,843.3	221.1	5,532.3
1987	3,395	941	89.3	1,568.4	62.2	880.1	3,561.9	132.0	6,734.4
1992	3,336	815	80.3	1,811.3	56.4	939.2	4,242.0	203.3	7,650.5
1997	3,031	663	66.3	1,663.7	48.5	954.4	4,855.9	228.2	8,523.9

### Manufacturing Growth For Miami, FL PMSA (1992/1997)

Industry	Total firms	Total Emp.	Payroll (millions)	Production workers	Value added by Mfg.	New capital Expenditures	Value of Shipments
Fabricated Metal Product Mfg	219/254	4.8/6.0	107.3/147.6	3.6/4.6	197.9/332.9	8.7/13.1	385.3/574.4
Food Mfg.	185/306	5.3/4.5	127.7/122.8	3.3/2.7	513.2/457.4	21.0/23.1	1,097.1/929.9
Furniture/ Related product Mfg	255/311	3.8/4.3	64.7/90.2	2.9/3.2	126.3/175.6	4.0/8.3	250.3/331.9
Medical Equip./Supplies Mfg	84/130	7.8/4.5	278.0/155.8	4.0/2.4	444.3/1,075.3	46.4/20.0	803.0/1,188.0

## ***1. Industrial Market Assessment***

A preliminary industrial trend analysis was performed to determine the FEC corridor's opportunities and its relative strength in relation to Metro-Dade and the South Florida regional economy. The Census of Manufactures, published by the U.S. Department of Commerce, serves as the primary data source for the industrial trend analysis. The *U.S. Census of Manufactures State Report* (conducted at five year intervals in years ending in 7 and 2) contains pertinent industry statistics such as: number of firms/establishments, total employment, payroll, value added by manufacture, value of shipments and new capital expenditures. Census figures are compiled for the state, county and Metropolitan Statistical Areas (PMSAs and CMSAs). The Census of manufactures covers all establishments with one paid employee or more primarily engaged in manufacturing as defined in the *Standard Industrial Classification (SIC) Manual* (The SIC was changed in 1997 to the North American Industrial Classification System NAICS).

The trend analysis determined that the Miami PMSA lost nearly 19,000 manufacturing jobs between 1977 and 1997. This is consistent with FEC corridor job loss statistics for the same reporting period. As previously reported, new firm formation was only evident in the Metals, Food, Furniture and Medical Instruments sectors. However, only Metals and Furniture experienced job growth.

In assessing the real economic impact of a particular manufacturing sector it is also necessary to weigh such factors as: 1) payroll for production workers, 2) value added by manufacture, and 3) new capital expenditures. Value added is considered the best value measure for comparing the relative economic importance of manufacturing among specific industrial sectors and defined geographic areas. A closer look at both the Metals and Furniture producing sectors in Miami indicates significant increases in production workers/wages, value added by manufacture, capital expenditures and value of shipments.

Manufacturing analysis also requires the full understanding of how a particular industry cuts across different sectors of the economy. The analysis must take into account complementary and supporting industries that contribute to the overall health of a manufacturing sector. This understanding is critical to an understanding of industrial clusters. For example, a cursory analysis of census data for the plastics industry in Miami-Dade and South Florida does not reveal eye-popping figures. However, an understanding of the larger plastics industry and its supporting and complementary sectors will indicate the presence of a viable manufacturing growth sector.

### Florida 1999 Annual Employment and Wages in Plastics

Sector	SIC	Companies	Avg.	Total Payroll	Avg. Wages
Packaging Paper & Plastics Film	2671	15	255	\$9,767,000	\$38,265
Plastics, Foil & Paper Bags	2673	20	1,232	\$39,609,000	\$32,157
Plastics Materials	2821	30	549	\$23,242,000	\$42,367
Unsupported Plastics Film & Sheets	3081	37	778	\$25,451,000	\$32,717
Unsupported Plastics Profile Shapes	3082	20	646	\$24,443,000	\$37,867
Laminated Plastics Plate Sheet & Profile Shapes	3083	25	384	\$12,021,000	\$31,340
Plastics Pipes	3084	12	897	\$24,411,000	\$27,207
Plastics Bottles	3085	17	1,004	\$32,429,000	\$32,300
Plastics Foam Products	3086	33	1,199	\$32,250,000	\$26,895
Custom Compound	3087	20	861	\$29,891,000	\$34,713
Plastics Plumbing	3088	53	1,511	\$39,194,000	\$25,948
Plastics products	3089	361	8,787	\$269,806,000	\$30,707
Special Dies & Tools	3554	10	253	\$10,227,000	\$40,423
Special Industry Machinery	3559	67	1,237	\$51,577,000	\$41,687
Manufacturing Ind.	3999	181	2,313	\$59,870,000	\$25,882
<b>Total Plastics</b>		<b>901</b>	<b>21,906</b>	<b>\$678,800,000</b>	<b>\$30,987</b>

The above table presents a thorough listing of the many manufacturing sectors that comprise the "plastics industry" in Florida. Further analysis will determine that there are 12 leading counties where the plastics industry is concentrated in Florida. Miami-Dade (257 firms) leads all counties followed by Broward (251 firms).



Emerging manufacturing sectors such as fabricated metals and custom design furniture create real opportunity within the FEC Corridor. The growing success of the Design District provides a market for custom or “niche” type manufacturing firms to locate within the surrounding industrial zones in Wynwood and Little Haiti. However, the physical condition of the public infrastructure that supports these areas is severely lacking. Additionally, water, sanitary sewer and stormwater capacity are inadequate in most areas. Lack of public infrastructure and municipal services creates a disincentive for manufacturing firms looking to expand or locate within Wynwood and Little Haiti. Inadequate water and sewer capacity has also resulted in water and sewer impact fees being imposed for hook-ups thus creating a further disincentive. The following feasibility analysis for typical commercial/industrial property investment scenarios – acquisition, rehabilitation/adaptive reuse and new construction – indicate the tenuous investment environment given the current market and the physical condition of the area.

### III. Commercial/Industrial Project Feasibility Analysis

#### A. Scenario # 1 - Straight Acquisition

30,000 square feet  
20.00% equity

##### Summary of Project Costs

	Square Feet	Cost (p.s.f.)	Total
<b>Acquisition</b>	30,000	\$45	\$1,350,000
<b>Water/Sewer Fee</b>			\$30,000*
<b>Soft Costs</b>		\$10	\$300,000
<b>Total Project Cost</b>			\$1,680,000

##### Summary of Project Financial Feasibility

	Square Feet	Lease Rate	Total
<b>Revenue</b>	30,000	\$5	\$150,000
<b>Less Vacancy</b>	6.00%		(\$9,000)
<b>Less Operating Expenses</b>			(\$30,000)**
<b>Net Operating Income</b>			\$111,000

##### Mortgage Financing Available:

	Annual	Monthly		
<b>Interest Rate</b>	7.50%			
<b>Amortization Period</b>	30 years			
<b>Debt Service</b>	(\$112,769)	(\$9,397)		
<b>Mortgage Financing</b>			80%	\$1,344,000
<b>Project Cost</b>				\$1,680,000
<b>Required Equity</b>			20%	\$336,000

##### Annual Return on Investment:

<b>Net Operating Income</b>	\$111,000
<b>Less Annual Debt Service</b>	(\$112,769)
<b>Cash Flow</b>	(\$1,769)
<b>Equity Investment Required</b>	\$336,000
<b>Annual Return on Investment (Year 1)</b>	(\$0.01%)

## B. Scenario # 2 - Acquisition/Rehabilitation/Re-use

30,000 square foot commercial/industrial building

20.00% equity

### Summary of Project Costs

	Square Feet	Cost (p.s.f.)	Total
Acquisition	30,000	\$45	\$1,350,000
Water/Sewer Fee			\$30,000*
Rehabilitation	30,000	\$20	\$600,000
Soft Costs		\$10	\$300,000
<b>Total Project Cost</b>			<b>\$2,280,000</b>

### Summary of Project Financial Feasibility

	Square Feet	Lease Rate	Total
Revenue	30,000	\$7	\$210,000
Less Vacancy	6.00%		(\$12,600)
Less Operating Expenses			(\$30,000)**
<b>Net Operating Income</b>			<b>\$167,400</b>

### Mortgage Financing Available:

	Annual	Monthly	
Interest Rate	7.50%		
Debt Service	(\$153,044)	(\$12,754)	
Amortization Period	30 years		
Mortgage Financing		80.00%	\$1,824,000
Project Cost			\$2,280,000
Required Equity		20.00%	\$456,000

### Annual Return on Equity:

Net Operating Income	\$167,400
Less Annual Debt Service	(\$153,044)
Cash Flow	\$14,356
Equity Investment Required	\$456,000
Annual Return on Investment (Year 1)	.03%

### C. Scenario # 3 New Construction

43,560 square feet (1 acre)  
 30,000 square foot building  
 20.00% equity

#### Summary of Project Costs

	Square Feet	Cost (p.s.f.)	Total
Land Acquisition		\$10	\$435,600
New Construction	30,000	\$55	\$1,650,000
Water/Sewer Fee			\$30,000*
Soft Costs		\$10	\$300,000
<b>Total Project Cost</b>			<b>\$2,415,600</b>

#### Summary of Project Financial Feasibility

	Square Feet	Lease Rate	Total
Revenue	30,000	\$7	\$210,000
Less Vacancy	6.00%		(\$12,600)
Less Operating Expenses			(\$30,000)**
<b>Net Operating Income</b>			<b>\$167,400</b>

#### Mortgage Financing Available:

	Annual	Monthly		
Interest Rate	7.50%			
Amortization Period	30 years			
Debt Service	(\$162,146)	(\$13,512)		
Mortgage Financing			80%	\$1,932,480
Project Cost				\$2,415,600
Required Equity			20%	\$483,120

#### Annual Return on Investment:

Net Operating Income	\$167,400
Less Annual Debt Service	(\$162,146)
Cash Flow	\$5,254
Equity Investment Required	\$483,120
Annual Return on Investment (Year 1)	.01%

The preceding analysis depicts a very marginal investment environment. Clearly, a manufacturing investment strategy for Wynwood and Little Haiti will require public infrastructure and capital facilities investment to alleviate existing streetscape conditions and water and sewer capacity issues.

## **IV. Housing Profile and Assessment**

### **A. Housing Need**

This section provides a profile and assessment of the FEC Corridor potential for expanded housing choice and opportunity. The issue of housing “affordability” is significant due to the fact that the median family income of all census tracts that comprise the FEC Corridor study area fall in the low- to moderate-income category. Low-income is defined as below 50 percent of the median household income for the Metropolitan Statistical Area (MSA), while moderate income is defined as between 50-80 percent of the MSA’s median household income. The current area median income (AMI) for the Miami Metropolitan Statistical Area (Miami-Dade County) is \$45,040 (HUD, 2000). By contrast, the median income for the City of Miami is \$34,921. In assessing an area’s housing affordability needs, it is important to consider that median incomes and housing prices can vary between census tracts and neighborhoods. The following table profiles key housing affordability variables by neighborhoods and census tracts within the FEC Corridor study area.

### FEC Corridor Neighborhood Housing Profile

Neighborhood	Census Tract	Income Level	1990 BNA Estimated Median Family Income \$	2001 BNA Estimated Median Family Income \$	Maximum Annual Amount afforded for Housing (30% of Income \$)	Maximum Monthly Amount afforded for Housing (30% of Income \$)	# HH Below the Poverty Line	% HH Below the Poverty Line	Median Age of Housing Stock
E to Bay	13.01	Moderate	20,508	30,055	9,017	751	626	26.99	26
E to Bay	13.02	Moderate	23,302	34,150	10,245	854	790	28.99	30
Little Haiti	14.01	Moderate	16,682	24,451	7,335	611	729	46.77	32
Little Haiti	14.02	Low	15,112	22,148	6,644	554	538	42.17	27
Little Haiti	20.01	Low	14,444	21,168	6,350	529	702	46.48	24
Little Haiti	20.03	Low	11,250	16,484	4,945	412	532	49.90	15
Little Haiti	20.04	Low	10,644	15,600	4,680	390	542	56.84	26
E to Bay	21.00	Middle	29,435	43,142	12,943	1,079	229	18.84	33
Little Haiti	22.01	Low	15,386	22,549	6,765	564	540	43.13	33
Little Haiti	22.02	Low	18,179	26,644	7,993	666	1,017	58.43	34
Wynwood	26.00	Low	12,346	18,094	5,428	452	649	47.82	30
E to Bay	27.01	Moderate	21,409	31,377	9,413	784	1,114	25.50	20
Edgewater	27.02	Low	13,750	20,151	6,045	504	279	46.06	35
Wynwood	28.00	Low	10,584	15,513	4,654	388	218	57.57	33
Wynwood	31.00	Low	10,968	16,074	4,822	402	805	57.24	19
	37.02	Low	12,679	18,582	5,575	465	528	55.15	11

The above table depicts an overall housing affordability shortfall within the FEC Corridor study area. Market affordability for homeownership is determined by the conventional mortgage underwriting guideline of allocating 28 percent of income to mortgage payments and 36 percent of income to all debt payments. The current homeownership rate for the FEC Corridor is only 27 percent (with a range of 12-55 percent in the various census tracts) compared to 58 percent for Miami-Dade County. The inability of FEC Corridor households to own their homes is exacerbated by the fact that the sale price of homes within the FEC Corridor has been steadily increasing. The median value of homes within the FEC Corridor as obtained from the 2000 Miami-Dade County Property Appraisal records was \$44,250. However, according to a February 2002 survey of the Multiple Listings Service (MLS) the median sale price of homes within the FEC Corridor was \$94,900.

## B. Housing Affordability

The issue of housing affordability within the FEC Corridor becomes more significant given the rising costs of housing. The following tables provide comparable housing affordability data and current assistance levels within the FEC Corridor study area.

**Comparative Housing Affordability Profile**

Area	Family AMI	Max Affordable Monthly Housing Cost by % of Family AMI			Estimated Renter AMI	Maximum Affordable Housing Cost
		Annual	30%	50%	80%	Annual
<b>Florida</b>	\$49,491	\$371	\$619	\$990	\$31,724	\$793
<b>Miami</b>	\$45,040	\$338	\$563	\$901	\$27,364	\$684
<b>Fort Lauderdale</b>	\$55,832	\$419	\$698	\$1,117	\$36,098	\$902
<b>Jacksonville</b>	\$54,139	\$406	\$677	\$1,083	\$32,912	\$823

AMI=Area Median Income (HUD2000)

FMR= Fair Market Rent (HUD, 2001)

Area	Family AMI	FMR by Number of Bedrooms			Income Needed to afford FMR (assumes 30% of income is applied to housing costs)		
		Annual	One	Two	Three	1BR	2BR
<b>Florida</b>	\$49,491	\$517	\$634	\$851	\$20,676	\$25,371	\$34,041
<b>Miami</b>	\$45,040	\$579	\$722	\$991	\$23,160	\$28,880	\$39,640
<b>Fort Lauderdale</b>	\$55,832	\$580	\$718	\$999	\$23,200	\$28,720	\$39,960
<b>Jacksonville</b>	\$54,139	\$530	\$638	\$843	\$21,200	\$25,520	\$33,720

AMI=Area Median Income (HUD, 2000)

FMR= Fair Market Rent (HUD, 2001)

Area	Housing Wage Hourly Wage Needed to Afford (@40 hrs/week)		
	1BR FMR	2BR FMR	3BR FMR
<b>Florida</b>	\$9.92	\$12.20	\$16.37
<b>Miami</b>	\$11.13	\$13.88	\$19.06
<b>Fort Lauderdale</b>	\$11.15	\$13.81	\$19.21
<b>Jacksonville</b>	\$10.83	\$12.27	\$16.21

AMI=Area Median Income (HUD, 2000)

FMR= Fair Market Rent (HUD, 2001)



### C. Assisted Housing

The location and level of housing assistance (rental and homeowner) varies significantly within the FEC Corridor. Three census tracts have assistance levels above thirty percent with six between ten and twenty percent. The remaining census tracts have less than five percent assisted housing. Considering the poverty level in the area, these assistance levels may not be adequate. The majority of the assistance comes in the form of public housing and Section 8 rental assistance.

#### FEC Corridor Assisted Housing

Neighborhood	Census Tract	Rental Section 8	Assisted Rental Units	Assisted Home-ownership Units	% Assisted Home Ownership Units	Tax Credit Units	Total Assisted Units	% Assisted Units/ Occupied Households
E to Bay	13.01	26	0	0	0	0	26	1.10%
E to Bay	13.02	14	16	0	0	0	30	1.10%
Little Haiti	14.01	30	99	163	10.50%	0	292	18.70%
Little Haiti	14.02	25	0	204	16%	0	229	17.90%
Little Haiti	20.01	45	0	405	26.80%	0	450	29.80%
Little Haiti	20.03	36	0	103	9.70%	0	139	13.00%
Little Haiti	20.04	18	28	1	0.10%	0	47	4.90%
E to Bay	21.00	27	22	0	0	0	49	4.00%
Little Haiti	22.01	49	0	0	0	0	49	3.90%
Little Haiti	22.02	32	8	17	1%	0	57	3.30%
Wynwood	26.00	11	44	122	9%	0	177	13.00%
E to Bay	27.01	28	0	0	0	0	28	0.60%
Edgewater	27.02	4	200	0	0	0	204	33.70%
Wynwood	28.00	27	0	16	4.20%	0	43	11.30%
Wynwood	31.00	84	235	185	13.20%	182	686	48.80%
E to Bay	37.02	23	0	0	0	0	23	2.40%

### D. Land Costs

The land cost of an average single-family property in the FEC Corridor study area is between \$8-9 per square foot. This cost is somewhat high for new affordable housing construction. Based on land and building costs, a small single family development could be built for sale at \$160,000 to \$190,000 per unit. Public infrastructure and land preparation (e.g. demolition) assistance combined with construction fee subsidies could lower sale prices from \$30,000 to \$60,000 per unit. Additional land/construction subsidies would be required to bring unit costs down to the \$90,000 to \$100,000 range, which would be affordable to households

earning \$35,000 per year. A typical parcel size for completing this development would be one-half acre allowing for six (6), two-story fee simple units to be built. A three-story development on the same size parcel would double the density with fee simple condominium (“coach” home) units above or below the two-story unit equating to 24-30 units per acre. This is the density typical of a transit-oriented development (TOD) and a key to the success of an affordable housing program. In either scenario, the developer will require significant economic incentives, land subsidy and an aggressive lender to achieve affordability and a higher quality design.

### **E. Housing Summary**

While housing supply and affordability are generally market related conditions, the affordable housing shortfall will require a carefully orchestrated combination of targeted local government commitments including zoning and housing incentives and business development. In general, the overall lack of housing availability has contributed to the escalating costs of blighted land making redevelopment more difficult. Local government implementation of new zoning incentives (supported by a market assessment of housing and land sales) and economic incentive programs (tax increment financing or tax exemption policies) will support development of affordable neighborhoods.

On-going federal and state housing funding allocations are an effective “back drop” to a strong, local government affordable housing program. Banks specializing in low- and moderate housing finance look to private developers who can successfully build housing for households at 80-120 percent of the median income for a specified area. The ability of government to prepare the way via regulations and public infrastructure is an important consideration. If financing is conventional, lending institutions typically require developers to have equity and to complete a market analysis justifying the land and/or construction loan. The experienced developer will typically propose affordable rental or purchase rates for housing based on 120 percent of the median household income if the costs of construction can be covered. This is the same “ceiling” used by government housing finance. Government or quasi-governmental financing is helpful when values or ownership are too difficult to navigate by a single developer. For example, in areas where there are multiple owners, government can begin a process of assemblage to facilitate redevelopment. The subsidy of the land serves as the incentive to the developer. Where there is one owner, but the value of land is extremely high, government can provide a financing commitment to offset the costs of development and maintain the pricing of development

consistent with the market. Within targeted areas there are opportunities for the city and the county to collaborate in both land assemblage and land subsidy to facilitate development.

## **V. Zoning Assessment**

### **A. Background**

In 2000, the FEC Corridor Task Force identified three (3) neighborhood districts – Wynwood, Little Haiti and Edgewater – and asked city staff to target these areas for planning and redevelopment activities. The three neighborhoods are defined by specific boundaries recognized by the city for planning, economic, cultural as well as city management purposes. During the course of the FEC Corridor Strategic Redevelopment Planning process, these neighborhood areas were further delineated to include five (5) sub-areas where redevelopment concepts could be developed that would serve as demonstrations for imparting the overall vision of the corridor and its economic viability. The sub-areas include: 1.) The Media District; 2.) The 25<sup>th</sup> Street Conservation Corridor; 3.) The FEC/Buena Vista Mixed-Use District; 4.) The Little Haiti Commercial Corridor; and 5.) The 79<sup>th</sup> Street Business and Greenway Corridor.

Given the redevelopment context of the study area – 70 percent of Miami’s remaining industrially zoned land and EDA initiated funding – the zoning assessment focused on the potential for investments increasing commerce or jobs to the area. Potential investment is based on stabilizing residential neighborhoods for employee housing and protecting them from intrusion of commercial uses, while fostering successful commercial activity along key corridors. The jobs/housing balance attracts long-term employment bases and increases mobility. However, it requires a careful blend of residential and commercial uses (in close proximity) to increase property values and quality of life. When commercial and/or industrial areas are planned in close proximity to residential neighborhoods, proper buffering via zoning regulations should be considered.

### **B. Existing Zoning Assessment**

The FEC study area has zoning that is typical of older South Florida urban neighborhoods and downtown areas. Major corridors are zoned C-1, including Biscayne Boulevard, 79<sup>th</sup> Street and NE 2<sup>nd</sup> Avenue. Transportation corridors are rimmed by R-3 with R-2 or R-1 zoning in the interior buffering the single family housing neighborhoods from commercial uses and automobiles associated with the corridors. “Spot zoning” for the most part has not occurred. There has been little change in zoning in the general area with the exception of amendments to implement the Little Haiti Master Plan. The zoning is “Euclidean” and needs to be updated to

direct “mixed use” zoning typical of urban infill. There is little regulatory direction for moderate intensity/density projects combining various types of new housing types at 18-30 du/ac typical of urban infill projects.

Industrial (I) zoning and heavy commercial (C-2) zoning are primarily located along NW 2<sup>nd</sup> and N Miami Avenues west of the FEC Corridor. There is a key industrial swath running approximately 1 mile along the FEC from 79<sup>th</sup> to 62<sup>nd</sup> Streets. The most obvious exception to the C-2 or heavier commercial zoning pattern east of the FEC RR is near the Buena Vista Rail Yard property. Most of Biscayne Boulevard is zoned C-1 with the exception of the key area of the Buena Vista container facility. Likewise, key east/west corridors servicing this parcel are zoned C-2. Many of the uses within this district are C-1 zoned type uses – convenience goods and services, automobile support services etc – and are abutting residential uses just to the interior of the corridor or within one block.

Much of the area closer to I-95 west of the industrial corridors is zoned R-1 and R-2. While many of these areas are developed at very low density, they are positioned between a major interstate highway corridor and several north/south county corridors with heavy commercial and industrial uses. The value and long term sustainability of these areas requires compatibility standards adopted as part of zoning whereby non-residential uses locating near residential areas must provide appropriate buffers.

The aforementioned Industrial and C-2 zoned areas between 79<sup>th</sup> and 62<sup>nd</sup> Streets along the FEC are rimmed by R-1, R-2 and R-3 zoned areas. According to staff notes and community input, the R-2 and R-3 areas are in need of “buffering” and perhaps new zoning that allows these areas to develop more as a mixed use area or appropriate residential density given the immediate proximity to an industrial area likely to remain industrial.

Office zoning is virtually non-existent in the general study area. There is an “Office” zoning category but the pattern of development indicates mixed use of office/retail or office/industrial flex space is likely. Home-office or “live-work” opportunities are linked to larger industrial buildings adapted as transitional uses including residential areas, for a segment of the arts community and its lifestyle. The “village” concept is also often discussed with respect to developing housing within close proximity, i.e., residential streets are within one block (1/4 mile) of a community business or convenience operation. The sustainability of individual and

institutional investments in these two types of emerging developments is important and is part of design and regulatory review process

Residential zoning is “pyramidal” in nature (i.e. all uses permitted in R-1 are permitted in R-2 and R-3 and so forth). Likewise, industrial and commercial districts permit previous district uses but are unclear about the inclusion and compatibility of residential uses within these areas.

There is little direction or specification for densities within the wide-ranging categories of R-1 through R-4.

### Zoning Districts

SYMBOL	TITLE
R-1	Single-Family Residential up to 9 dwelling units/acre net
R-2	Two-Family Residential – low rise – maximum density of 18 dwelling units/acre net
R-3	Multi-Family Medium-Density Residential – mid rise – maximum density of 65 dwelling units/acre net
R-4	Multi-Family High-Density Residential – high rise – maximum density of 150 dwelling units/acre net
O	Office
G/I	Government and Institutional
C-1	Restricted Commercial
C-2	Liberal Commercial
CBD	Central Business District
I	Industrial
SD-5	Brickell Avenue Area Residential-Office District
SD-6, 6.1	Central Commercial-Residential Districts
SD-8	Design Plaza Commercial-Residential District
SD-9	Biscayne Boulevard North Overlay District
SD-12	Buffer Overlay District
SD-14, 14.1, 14.2	Latin Quarter Commercial-Residential, and Residential Districts
SD-19	Designated F.A.R. Overlay District
SD-20	Edgewater Overlay District

### C. Dimensional requirements

Dimensional lot regulations under the existing zoning are straightforward and do not vary except to provide minor height limitations for buildings in R-3 and R-4 near areas zoned R-2 and R-1. However, there is little direction for how higher density buildings *within* R-3 and R-4 zoned areas will provide adequate buffering to transitional density developments adjacent or nearby and within the same district. The existing use maps indicate that the large swaths of R-3 zoning have a problem with buffering moderate and high-density development in several areas. FAR, green space and building footprint guidelines appear to be very general and do not provide for much direction or creativity for infill development that is likely to occur in the study area. Rear or other yard requirements on waterways are not prescribed to create “view” corridors along waterways.

#### Dimensional Requirements

Zone	Side Yard	Rear Yard	Front Yard	Min Lot width	Min Lot Size (S. F.)	Max Height (from flood, s/w, wherever greater)	FAR (x gla)	Bldg. Foot (x gla)	Green Space (x gla)
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#### *Residential*

R-1	5'	20- 10 acc	20	50	5,000	25'	.60	.40	.15
R-2	5'	20- 10 acc	20	50	5,000	25'	.60	.40	.15
R-3	10'	10' – 20' abut R-1, R-2	20	50	5,000	50'	.75	.40	.15
R-4	10'	10' – 20' abut R-1, R-2	20	100'	20,000	At base bldg. line = ROW + 2 fysb either side of ROW or 120' wherever greater – 1 for 1 after, special add collectors and arterial frontage	1.72	.40	.15

#### *Commercial*

C-1	None or same as abut	10' or same as abut	10'	50'	5,000	Same as R-4	1.72	.40	.10
C-2	None or same as abut	10' or same as abut	None	100	10,000	120' or 10 floors, wherever less	1.72	.60	.10
I	None or same as abut	10' or same as abut	None	100	10,000	120' or 10 floors, wherever less	1.72	.60	.10

## **D. Permitted Uses**

Residential permitted uses are limited to residential only or various types of overnight or extended stay care facilities and lodging. Houses of worship are permitted, but there are no specific guidelines of how to plan the necessary parking and other uses now typically found in conjunction with churches (i.e., schools and recreational facilities) when near single family and/or multi family residences. Hotels, motels and commercial overnight facilities are mentioned almost as an afterthought. Given the Miami and South Florida market, and the proximity to water and other attractions, perhaps a special Hotel or Entertainment District in the appropriate corridors might energize the lodging community to locate and redevelop buildings in locations where lodging uses are more appropriate than housing.

Specific housing styles (i.e., rowhouses, cluster dwellings vs. typical quads or triplexes, multi-story townhouses/rowhouses – known in the north east as “brownstones” etc...) are hardly mentioned in residential sections of the Code. There is no specification for moderate intensity (maximum four story, 18-30 dwelling units/acre) housing typical of infill in transitional areas zoned R-3 and R-4. If home ownership is a goal, along with increasing long standing job growth and job quality, changes will likely need to be made to encourage these “fee simple” housing types in moderate density categories.

Retail uses appear primarily through C-1 zoning. C-1 zoning is pyramidal in nature including all uses in residential and office with additions made for retail and service uses. Mixed-use appears to be permitted in this district by pyramidal inclusion but there are relatively few guidelines about what is expected in terms of final development percentages and dimensional requirements based on the aesthetic desired. Automobile dealerships, repair and other heavy commercial sales/repair uses need to be reviewed for impact in this area.

Mixed-use in the study area appears primarily through special districts (SDs). In the FEC study area there are SD 6 and SD 6.1 Districts that support nearby CBD zoned areas. These SDs are predominantly found in the Edgewater area and require a Special Permit for all uses. A Special Permit requires the Planning Director to get recommendations and advice from UDB for approval of use. In effect, it appears there are no “as of right” uses which the Planning Staff can review and approve without the process requiring review by a board. For an area as large and as poised for redevelopment as the FEC Corridor, many uses should be easily approved via staff



through a plans-review process to attract both smaller and larger developers. Candidates for staff approval are areas such as: SD-8, Design District zoning, which appears to be suited to that specific area; and SD-12 – a “Buffer” Zoning found in the Wynwood area (this district does not appear to be working as intended and is not typical). Buffer or setback guidelines are usually provided for each district based on the proposed use and the abutting property uses. In general, there are few "meaningful" mixed use zoning regulations in place for the study area. A review of other SD's (adopted as part of the code, but not found as zoned areas within the study area) indicates that the closest possible SD that might be a template for the area is SD 14 and/or SD 14.1 (essentially a combination of C-1 and R-4).

A final recommendation would be the creation of “Urban Village” or specific mixed-use districts that by "name" indicate the nature of the vision, plan and density desired. For example, “WUV-36” Wynwood Urban Village, 36 dwelling units per the net acre maximum.” This district might read like the SD 14 with less cumbersome approval procedures, more specific buffering requirements, and specific requirements for uses that might be “grandfathered” from previous codes, which by their nature could have a greater impact on redevelopment and home ownership in neighborhoods than others (i.e., automobile dealership and repair, larger HOW's with schools, and parking lots). Housing styles could be specified and incentives linked to fee-simple housing in certain areas.

The FEC corridor's industrial zoning is undifferentiated. Each of the industrial zones allows for "general" industrial uses that do not specify wanted or unwanted uses. The city should consider several industrial zoning classifications including "limited" or "light" industrial zones. These areas would accommodate "clean" and, perhaps, targeted industry based on the industrial plan for the corridor. The growth in custom design furniture and metalworking certainly warrants a level of classification.

Limited or light industrial zones might also be considered for transitional zones between residential/retail areas and general industrial zones. Limited industrial zones would be ideal for areas designated for live/work.

Given the job creation focus of the corridor study, the City should consider ways to protect its industrial inventory of land and buildings. Industrial Districts preserve the integrity of industrial areas by preventing the proliferation of higher-end residential and mixed-use developments that typically accompany corridor redevelopment. Industrial Districts also serve as

incentives to industrial firms concerned with maintaining their investment against the potential encroachment of incompatible land uses.

Strategies for maintaining the corridor's manufacturing zone inventory should also be considered. The FEC corridor's close proximity to I-95 and the Port of Miami make it ideally suited for warehouse and distribution uses. While warehousing and distribution are vitally integral to industrial areas, they are generally empty facilities from a job creation standpoint. The City should consider limiting shell warehouse/distribution facilities that consume industrial land targeted for job producing manufacturing uses. Given the growing demand for industrial space within the corridor, the City may want to consider expanding its industrial zoning to other locations within and adjacent to the corridor. Limited industrial zones for manufacturing growth sectors, e.g., custom furniture, metalworking and plastics, could be an effective industrial attraction/retention strategy. Existing areas designated for general industrial uses should be evaluated for re-classification to light industry.

## **E. Summary**

### ***1. R-1 Zoning***

Some existing low density, R-1 zoned acreage may not be sustainable, especially in areas in close proximity to I-95. The existing housing stock and land values identify key areas for redevelopment via specified rezoning to a higher density relative to market conditions. Potential redevelopment scenarios for these specified areas are provided based on market conditions and the availability of public and private resources.

There are some areas zoned R-1 that may not sustain the typical 2,500 sq. ft. fee simple housing stock near interstate highways or heavy commercial corridors over time. Given current market conditions, developers are more inclined to build higher density housing, including a combination of fee simple and rental housing without heavy government subsidies. Some areas zoned R-1 might be rezoned to a higher density and/or mixed use development – R-1 to “Urban Village” District (SD14 or other similar but modified zoning).

Some areas zoned R-1 should remain, and be further sustained through stronger regulations for compatibility requirements. Both commercial and residential zoning regulations should be revised to include specific sections for compatibility design review applicable to non-residential uses within 100 feet of a residential use because dimensional regulation requirements are not enough.

## ***2. R-2 Zoning***

Some existing housing stock within R-2 zones, especially those areas in close proximity to I-95 and other key commercial corridors, may not be sustainable. Duplex units, 1,500 – 2,200 sq. ft. fee simple housing stock (typical of this type of zone), may not be sustainable near an interstate highway over time. Given market conditions and zoning allowances, developers may build new higher density fee simple housing with fewer subsidies through R-3 rezoning or a special mixed-use district for specified areas.

New housing types – rowhouses with or without flats above or below units, zero-lot-line, cluster dwellings among other housing types – could be included as part of a revision to R-2 zoning. The height in this district might also be raised to 35' to sustain the typical 3-story development (housing over covered garage) for key R-2 areas. There is a need to identify areas zoned R-2 that could benefit from rezoning (25 to 35' height) with new development tools specifying new housing types while providing better compatibility requirements much like the R-1 zoned areas described above.

## ***3. R-3 and R-4 Zoning***

Some existing low density housing stock in areas zoned R-3 indicates that a zoning change is needed to direct re-investment in higher quality projects. Based on existing lower density, historical inventory, and proximity to other R-1 and R-2 neighborhoods, some areas zoned R-3 could be rezoned to appropriate lower density districts.

Some R-3 zoned acreage near C-2 and Industrial areas in Little Haiti could be rezoned to a special mixed-use type district to better serve job creation and market conditions. These special districts (SDs) would have a FAR, green space and building footprint guidelines appropriate to an urban environment and would support nearby higher density housing and retail operations.

Some key areas zoned R-3 could be considered for rezoning to R-4 or a special district combining R-4 and commercial zoning.

## ***4. C-1 and Office Zoning***

Many key east/west and north/south corridor segments are zoned residential or C-2 zoning. Some C-1 areas are developed at a higher commercial intensity than perhaps intended by the district. The intrusion of higher intensity C-2 type uses can preclude the development of higher quality housing stock nearby and affect operations of C-1 uses. Some local corridor

segments should be rezoned to “Community Business,” a district more controlled than C-1. Community Business zoning could assist neighborhood retailers and services as well as neighborhood redevelopment by enforcing regulations appropriate for commercial operations within 640 feet of fee simple housing to encourage more home ownership and increases in property values.

White and blue-collar offices along key corridors support neighborhood redevelopment and sustain operations of C-1 type uses. The existing Office zoning category is virtually non-existent in the study area. Some areas within C-1 and O could be rezoned to Community Business to encourage location of low-rise offices mixed with retail services.

Mixed-use is permitted in the district by pyramidal inclusion but there are relatively few guidelines about what is expected in terms of final development percentages and dimensional requirements. Some areas zoned C-1 are developing as mixed-use areas and might be rezoned to a more appropriate special district to maintain the quality of housing. Automobile dealerships, repair and other heavy commercial sales/repair uses need to be reviewed for impact in this area.

### ***5. C-2 and Industrial Zoning***

The C-2 zoning category does not indicate that it is intended for mixed use residential and commercial. Rather the zoning designation is intended for office flex space, light industry and related retail. However, many of the C-2 zoned areas are developing as residential and retail areas and are in close proximity to areas targeted for similar growth. Some areas could be rezoned to a special district or C-1 based on housing quality and market conditions.

The Industrial zoning does not indicate that it is intended for residential or mixed use including residential. Yet, there is a market trend to convert older industrial buildings – at least as a transitional use – from industrial to mixed use residential and office space (live/work lofts or home occupational areas). Based on the above assessment of C-2, the conversion of valuable Industrial zoned areas to C-2 (another inappropriate designation for residential uses) indicates a special district is needed for those areas anticipated for this type of transitional uses. Small scale rezoning from Industrial to C-2 to permit residential conversions of industrial space is required by the Comprehensive Plan. The development of an appropriate rezoning for this type of activity could protect the investment in housing both by individuals and lenders in areas previously envisioned for industrial and heavy commercial.

The industrial zoning is based on a 1900's manufacturing paradigm. Manufacturing has evolved into "craftsmanship," office/flex space and high tech assemblage. A new district should be developed to encourage new markets and target new investments. This is especially true of the Wynwood/Buena Vista and Little Haiti areas.

Within the current industrial zoning, a more specific section regarding compatibility is needed. Requirements regarding emission of various fumes, noise and materials are generalized. Refining these requirements based on new industry standards will assist industry, businesses and housing markets to sustain investments in all uses in such close proximity.

#### ***6. Special District (SD) Zoning***

Mixed use appears primarily through the use of special districts (SDs). The SD 6 and SD 6.1 that support nearby CBD zoned areas are found in the Edgewater area and require a Special Permit for all uses. The SD-8 zoning for the Design District area appears to be suited to that specific area.

The SD-12 is a "Buffer" Zoning found in the Wynwood area. This district does not appear to be working as intended and is not typical. A buffer or setback guideline is given for each district based on the use proposed and that which is nearby. This district might be rezoned to an appropriate district such as Community Business.

## VI. FEC Corridor Community Assets

The following is a numerical listing of the number of agencies/entities found in each of the listed categories for the FEC Corridor area as compared to the number listed for the Miami area as a whole. The names and addresses of these assets are attached as Appendix II.

A quick review of the assets available to the residents of the FEC Corridor indicates a preponderance of Political organizations (18 percent) and Places of Worship (13.6 percent) as compared to all other assets. Other fairly well represented assets include Youth Centers and Art Galleries at ten percent. Additional assets above the five percent mark include Social services (8.1 percent), Non-Profit organizations (7.9 percent), County government agencies (7.6 percent), Nursing Homes (6.4 percent), and Libraries (6.1 percent). Less well-represented assets include City Government agencies (4.4 percent), Museums (4 percent), Theatres and Movies (3.7 percent), Parks (3.5 percent), Mental Health (3.4 percent), and Day Care (3.2 percent). Assets with less than two percent representation include Clinics (1.7 percent), Hospitals and Pharmacies (1.5 percent), Camps and Banks (1.4 percent), Doctors (0.8 percent) and Department Stores (0.7 percent). Some non-existent assets include: Occupational Therapists, Nurses, Hospices, Zoos and other forms of Entertainment and Amusement.

### Assets

	FEC	MIAMI	% within FEC (FEC/MIAMI)
<b>City Government Agencies</b>	<b>10</b>	<b>229</b>	<b>4.4%</b>
<b>County Government Agencies</b>	<b>25</b>	<b>329</b>	<b>7.6%</b>
<b>Parks</b>	<b>6</b>	<b>171</b>	<b>3.5%</b>
<b>Libraries</b>	<b>3</b>	<b>49</b>	<b>6.1%</b>
<b>Non-Profits</b>	<b>23</b>	<b>292</b>	<b>7.9%</b>
<b>Places of Worship</b>	<b>208</b>	<b>1,534</b>	<b>13.6%</b>
<b>Banks</b>	<b>9</b>	<b>632</b>	<b>1.4%</b>
<b>Department Stores</b>	<b>1</b>	<b>146</b>	<b>0.7%</b>
<b>Pharmacies</b>	<b>9</b>	<b>594</b>	<b>1.5%</b>
<b>Day Care</b>	<b>19</b>	<b>585</b>	<b>3.2%</b>

### Assets

	FEC	MIAMI	% within FEC (FEC/MIAMI)
<b>Youth Centers</b>	5	48	10.4%
<b>Entertainment/Amusements</b>	0	34	0%
<b>Art Galleries</b>	21	210	10%
<b>Museums</b>	1	25	4%
<b>Theatres and Movies</b>	1	27	3.7%
<b>Zoos</b>	0	3	0%
<b>Social Services</b>	25	307	8.1%
<b>Political</b>	3	16	18.8%
<b>Camps</b>	1	69	1.4%
<b>Doctors</b> (Cardiology, Emergency Medicine, Family Practice, Internal Medicine, and Pediatrics)	16	1,925	0.8%
<b>Hospices</b>	0	8	0%
<b>Hospitals</b>	1	65	1.5%
<b>Clinics</b>	13	773	1.7%
<b>Mental Health</b>	2	59	3.4%
<b>Nursing</b>	0	67	0%
<b>Nursing Homes</b>	5	78	6.4%
<b>Occupational Therapists</b>	0	18	0%

## APPENDIX I

### City of Miami/FEC Corridor Commercial Real Estate Sub-Market

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg Size
434 SW 12 <sup>th</sup> Ave. Building	434 SW 12 <sup>th</sup> Av	Keyes Asset Management	Office	Completed	\$12.00 FS	20,000	20,000
1393 Building	1393 SW 1 <sup>st</sup> St	McDonald & McDonald	Office	Completed	\$7.50 FS	1,000	16,000
Levapan Building	1800 SW 1 <sup>st</sup> St	Call Black's Guide	Office	Completed	\$10.00-12.00 FS	3,500	17,176
Belo Plaza	807 SW 25 <sup>th</sup> Av	Rosado Admin. Group, Inc.	Office	Renovated	\$13.00	2,200	21,000
25 <sup>th</sup> Street	25 <sup>th</sup> St	Call Black's Guide	Land	Proposed	\$653,400	Site Sizes TBD	
Interamerican Plaza	701 SW 27 <sup>th</sup> Av	Continental Real Estate Companies	Office	Completed	\$17.00 FS	48,000	165,000
1490 Northwest 27 <sup>th</sup> Avenue	1490 NW 27 <sup>th</sup> Av	Allen Morris Company	Office	Completed	\$16.00 FS	6,300	31,879
Melin Building	3841-3930 NE 2 <sup>nd</sup> Av	The Dacra Companies	Office	Renovated	\$18.50 NNN	9,425	195,000
Miami Interior Design 1	4100 NE 2 <sup>nd</sup> Av	Lee Holdings Company, Inc	Office	Completed	\$15.00 G	1,000	53,000
Miami Interior Design	4141 NE 2 <sup>nd</sup> Av	Ross Properties	Office	Completed	\$15.00 G	3,663	122,000
Little River Bank Building	8340 NE 2 <sup>nd</sup> Av	Citadel Building	Office	Completed	\$12.00 FS	15,000	59,000
Biscayne Boulevard Land	NE 34 <sup>th</sup> St	Arvida Realty Services	Land	Proposed	\$1,742,400	Site Sizes TBD	C-1 – SD-20
225 Building	225 NE 34 <sup>th</sup> St	Leoni & Company	Office	Completed	\$18.00 FS	3,800	45,000
Capital Square	801 NW 37 <sup>th</sup> Av	Call Black's Guide	Office	Completed	\$18.00 NNN	7,000	57,000
Forcenergy Center	2730 SW 3 <sup>rd</sup> Av	Forcenergy Realty	Office	Completed	\$19.00 G	13,200	32,000



**City of Miami/FEC Corridor Commercial Real Estate Sub-Market**

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg Size
Biscayne Plaza	561 NE 79 <sup>th</sup> St	Terranova Corporation	Office	Completed	\$14.00-16.00 N	5,400	36,000
Golden Glades Parcel	15550 NW 7 <sup>th</sup> Av	Florida East Coast Realty, Inc.	Land	Proposed	\$566,280	TBD	Business
Monaco Building	1850 SW 8 <sup>th</sup> St	Monaco Building	Office	Completed	\$12.50 FS	3,000	22,000
Harbor Place	900 Biscayne Blvd	Divaris Real Estate	Office	Completed	\$15.00 G\ + Electric	9,000	90,000
Boulevard Center	1444 Biscayne Blvd	Baypoint Office Tower, Inc.	Office	Completed	\$21.00-25.00 N	33,311	117,781
Omni Technology Center	1501-1701 Biscayne Blvd	Codina Realty Services, Inc.	Office	Renovated	\$21.00-25.00 N	1,057,765	1,057,765
Former IBM Building	2125 Biscayne Blvd	Baypoint Office Tower, Inc.	Office	Completed	\$19.00 FS	18,805	49,900
Biscayne Boulevard Land	2315 Biscayne Blvd	Arvida Realty Services	Land	Proposed	\$2,178,000	Site Sizes TBD	C-1 – SD-20
Biscayne Boulevard Land	2322 Biscayne Blvd	Arvida Realty Services	Land	Proposed	\$2,178,000	Site Sizes TBD	C-1 – SD-20
Biscayne Boulevard Land	2336 Biscayne Blvd	Arvida Realty Services	Land	Proposed	\$2,178,000	Site Sizes TBD	C-1 – SD-20
Biscayne Boulevard Land	2347 Biscayne Blvd	Arvida Realty Services	Land	Proposed	\$2,178,000	Site Sizes TBD	C-1 – SD-20
The Picasso Tower	2800 Biscayne Blvd	Baypoint Office Tower, Inc.	Office	Completed	\$20.00 FS	12,000	65,000
Executive Plaza	3050 Biscayne Blvd	B.C. Property Investments	Office	Completed	\$17.50-19.50 FS	11,100	81,063

**City of Miami/FEC Corridor Commercial Real Estate Sub-Market**

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg Size
3510 Building	3510 Biscayne Blvd	B.C. Property Investments	Office	Completed	\$16.50-18.50 FS	1,000	19,000
Capital Bank Building	3550 Biscayne Blvd	Lucky Realty, Inc.	Office	Renovated	\$18.00 FS	4,000	47,000
Atrium at Biscayne	4500 Biscayne Blvd	B.C. Property Investments	Office	Completed	\$17.50-22.00 FS	10,700	65,000
BayPoint Office Tower	4770 Biscayne Blvd	Codina Realty Services, Inc.	Office	Completed	\$18.50-21.50 FS	29,275	134,500
6400 Biscayne Building	6400 Biscayne Blvd	Arvida Realty Services	Office	Completed	\$13.00-15.00 N	10,000	18,750
Andros Building	1330 Coral Way	Commodore Realty, Inc.	Office	Completed	\$16.50 FS	376	29,145
Coral Way Banking Center	1699 Coral Way	Insignia/ESG, Inc.	Office	Completed	\$16.00 FS	12,633	32,494
2050 Building	2050 Coral Way	Ralph Realty Corp	Office	Completed	\$30.00\ Parking	450	23,500
Coral Plaza	2100 Coral Way	Abood & Associates, Inc.	Office	Completed	\$18.50-21.00 FS	10,770	50,347
2150 Building	2150 Coral Way	Argus Trade Realty & Investment	Office	Completed	\$19.33-26.00 FS	3,000	17,600
2828 Coral Way Building	2828 Coral Way	America's Capital Partners	Office	Completed	\$19.00 FS	5,200	60,000
Madison Circle Executive Office	3191 Coral Way	Forte Properties	Office	Completed	\$21.00 FS	8,140	135,000
Lightspeed Gateway Center	3301 Coral Way	Lightspeed Infrastructure/Swerdlow Group	Office	Completed	\$22.00-24.00 NNN	103,080	262,236

**City of Miami/FEC Corridor Commercial Real Estate Sub-Market**

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg Size
1333 South Miami Avenue	1333 S Miami Av	Larkin Schmidt Weidenbaum Com.	Office	Completed	\$19.00 FS	5,000	16,487
4141 Building	4141 N Miami Av	Lee Holdings Company, Inc	Office	Completed	\$10.00 FS	1,000	15,000

*Source: Black's Guide to Commercial Real Estate, FIU Metropolitan Center*

**Miami Beach Commercial Real Estate Sub-Market**

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg Size
The Lincoln	940 17 <sup>th</sup> St	Cushman & Wakefield	Office	Under Construction	\$32.00-34.00 + Electric	120,000	160,000
Colonial Bank Building	301 41 <sup>st</sup> St	Continental Real Estate Companies	Office	Completed	\$26.00 FS	20,000	30,000
801 Arthur Godfrey Bldg	801 41 <sup>st</sup> St	Cushman & Wakefield	Office	Completed	\$24.00 G	4,900	40,000
City National Bank Building	300 71 <sup>st</sup> St	Abood & Associates, Inc.	Office	Completed	\$14.00 FS	1,186	58,000
Midtown Center	333 Arthur Godfrey Rd	Abood & Associates, Inc.	Office	Completed	\$20.00 G	12,000	58,500
420 Lincoln Road Associates, Ltd.	420 Lincoln Rd	Abood & Associates, Inc.	Office	Completed	\$24.00-27.00 FS	40,000	75,000
1111 Lincoln Road Building	1111 Lincoln Rd	Welsh Companies S.E.	Office	Completed	\$31.00 G	1,939	140,000
1688 Meridian	1688 Meridian Av	Insignia/ESG, Inc.	Office	Renovated	\$26.00-31.00 FS	10,000	20,000
Michigan At 17 <sup>th</sup>	1680 Michigan Av	Streamline Properties	Office	Renovated	\$26.00-30.00 FS	10,000	16,000
Atlantic Center	119 Washington Av	Taylor & Mathis, Inc.	Office	Under Construction	\$35.00-36.00	45,000	45,000

### Miami Beach Commercial Real Estate Sub-Market

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg Size
555 Washington Avenue	555 Washington Av	Cushman & Wakefield	Office	Under Construction	\$35.00 N	48,000	70,000
NationsBank Building	930 Washington Av	Streamline Properties	Office	Completed	\$22.50 FS	2,000	23,551
Courthouse Square	1210 Washington Av	Capital Realty Services	Office	Completed	\$22.00 FS\ + Electric	5,000	30,000
1253 Building	1253 Washington Av	PIX Realty, LT	Office	Completed	\$25.00 + Elec.\ Cleaning	6,000	72,000
Lincoln Place	1601 Washington Av	Insignia/ESG, Inc.	Office	Under Construction	\$32.00-36.00	60,000	47,352

Source: Black's Guide to Commercial Real Estate, FIU Metropolitan Center

### Airport West Commercial Real Estate Sub-Market

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg. Size
Civic Center Profession Bldg.	1399 NW 17 <sup>th</sup> Ave.	Alfred H. Underwood, DDS	Office	Completed	\$15.00 FS	4,244	19,075
Miami Office One	8725 NW 18 <sup>th</sup> Ter	ComReal Miami, Inc.	Office	Completed	\$17.50 FS\ + Electric	7,210	60,000
Northwest 25 <sup>th</sup> Street	NW 25 <sup>th</sup> St.	Codina Realty Services, Inc.	Land	Proposed	\$740,520	Site Sizes TBD	
7225 Building	7225 NW 25 <sup>th</sup> St.	Biscay Development Corp	Office	Completed	\$17.76	350	21,600
25 <sup>th</sup> Street Executive Bldg.	9300 NW 25 <sup>th</sup> St.	ComReal Miami, Inc.	Office	Completed	\$12.00-15.00 FS	5,060	25,544

### Airport West Commercial Real Estate Sub-Market

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg. Size
Square One Business Center	10566 NW 26 <sup>th</sup> St.	Britannia Realty Inc.	Office	Completed	\$18.18N	1,056	28,758
Transal Office Park	8200-8290 NW 27 <sup>th</sup> St	Kennedy Wilson Florida Mgmt. Inc.	Office	Completed	\$14.00 + Electric/ c.a.m.	10,381	134,000
Westside Plaza III	8200 NW 33 <sup>rd</sup> St.	Codina Realty Services, Inc.	Office	Completed	\$21.95	104,755	104,755
Westside Plaza II	8300 NW 33 <sup>rd</sup> St.	Codina Realty Services, Inc.	Office	Completed	\$21.75 FS	5,700	104,799
Doral Holdings	8180 NW 36 <sup>th</sup> St.	WestVest Associates, Inc.	Office	Completed	\$21.00 FS	62,000	62,000
Avex Building	6405 NW 36 <sup>th</sup> St.	Abood & Associates, Inc.	Office	Completed	\$12.00- \$14.00 FS	7,000	44,000
Virginia Plaza	6501-6595 NW 36 <sup>th</sup> St.	First Arabian Financial Corp.	Office	Completed	\$12.00- \$15.00 FS	280	146,000
Atlantic Bank Building	7220 NW 36 <sup>th</sup> St.	Regulus of Florida Inc.	Office	Renovated	\$16.00 FS	2,440	75,000
Airport Plaza Office Park	7370 NW 36 <sup>th</sup> St.	Call Black's Guide	Office	Completed	\$14.00- \$20.00 FS	22,000	51,500
The Quarters	8001-8051 NW 36 <sup>th</sup> St.	Eller Properties Inc.	Office	Completed	\$14.00 G	2,356	60,840
Doral Holdings	8180 NW 36 <sup>th</sup> St.	WestVest Associates, Inc.	Office	Completed	\$16.50 FS	2,200	62,000
The Courtyards	8181 NW 36 <sup>th</sup> St.	Commercial Property Group	Office	Renovated	\$14.00 N	10,000	56,000
Doral Court	8600 NW 36 <sup>th</sup> St.	America's Capital Partners	Office	Renovated	\$20.00 FS	69,455	225,390

### Airport West Commercial Real Estate Sub-Market

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg. Size
Royal Palm Executive Ctr.	8669 NW 36 <sup>th</sup> St.	Terremark Realty	Office	Renovated	\$22.50 FS\ + Electric	88,750	121,000
Royal Palm Doral Ctr. I	8699 NW 36 <sup>th</sup> St.	Terremark Realty	Office	Completed	\$22.50-23.50	58,000	95,000
Doral Corporate Center I & II	3750 NW 87 <sup>th</sup> St.	Jones Lang LaSalle	Office	Completed	\$23.00	60,000	60,000
Royal Palm Doral Ctr. III	8200 NW 41 <sup>st</sup> St.	Terremark Realty	Office	Completed	\$23.00 FS	4,900	102,000
Doral Executive Building	9690 NW 41 <sup>st</sup> St.	Larkin Schmidt Weidenbaum Com.	Office	Completed	\$19.00 FS	12,500	27,216
Doral Costa Office Park	9700 NW 41 <sup>st</sup> St.	Trammell Crow Co.	Office	Proposed	\$17.00-19.00	130,000	280,000
Doral Costa Office Park, Bldg. II	9700 NW 41 <sup>st</sup> St.	Trammell Crow Co.	Office	Proposed	\$17.00 NNN	130,000	130,000
Doral Costa Office Park, Bldg. III	9700 NW 41 <sup>st</sup> St.	Trammell Crow Co.	Office	Proposed	\$17.00 NNN	20,001	20,001
Corporate Park of Miami	7700 NW 48 <sup>th</sup> St.	Abood & Associates, Inc.	Land	Proposed	\$653,400	40000	Off/Ind/Comm
Palmetto Flex Space	16305-16315 NW 48 <sup>th</sup> Av.	Adler Management Services, Inc.	Office	Completed	\$5.25 NNN	13,777	24,265
Former Supreme International Headquarters	7495 NW 48 <sup>th</sup> St.	Corporate Realty Solutions, Inc.	Office	Completed	\$5.99 NNN	20,034	20,034
Biscayne Boulevard Land	2218 NE 4 <sup>th</sup> Ave	Arvida Realty Services	Land	Proposed	\$2,178,000	Site Sizes TBD	C-1 – SD-20
Koger Center-Davenport Building	8200 NW 52 <sup>nd</sup> Ter	Koger Realty Services, Inc.	Office	Completed	\$22.00 FS	17,562	75,000

### Airport West Commercial Real Estate Sub-Market

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg. Size
Koger Center-Scranton Bldg.	8075 NW 53 <sup>rd</sup> St.	Koger Realty Services, Inc.	Office	Completed	\$16.00 FS	3,287	31,000
Koger Center	8075-8405 NW 52 <sup>nd</sup> St	Koger Realty Services, Inc.	Office	Completed	\$16.00-30.00	14,800	25,900
Koger Center-Seattle Building	8325 NW 53 <sup>rd</sup> St.	Koger Realty Services, Inc.	Office	Completed	\$16.00 FS	4,583	32,000
Koger Center-Rochester Bldg.	8390 NW 53 <sup>rd</sup> St.	Koger Realty Services, Inc.	Office	Completed	\$17.00 FS	8,087	43,910
Koger Center-Athens Building	8405 NW 53 <sup>rd</sup> St	Koger Realty Services, Inc.	Office	Completed	\$16.00 FS	3,353	52,000
Meridian Executive Center	815 NW 57 <sup>th</sup> Ave	Jones Lang LaSalle	Office	Completed	\$18.75-20.50 + Electric	12,971	88,077
Milam 25	2550 NW 72 <sup>nd</sup> Ave	Airport West Properties	Office	Completed	\$17.00 FS	400	24,141
Milpa & Wesley Centers	6801-6955 NW 77 <sup>th</sup> Ave	CBA Service Company	Office	Completed	\$6.00-13.00 + Electric	25,000	96,000
AIB Building	2500 NW 79 <sup>th</sup> Ave	Alliance Commercial Real Estate Group	Office	Completed	\$15.00-16.00 FS	60,000	100,000
The Atrium Office Park-Building 2	3900 NW 79 <sup>th</sup> Ave	Delma Realty Services	Office	Renovated	\$16.50 FS	2,292	14,805
The Atrium Office Park-Building 4	3900 NW 79 <sup>th</sup> Av	Delma Realty Services	Office	Renovated	\$17.00 FS	433	33,161
The Atrium Office Park-Building 5	3900 NW 79 <sup>th</sup> Ave	Delma Realty Services	Office	Renovated	\$16.50 FS	1,672	33,161

### Airport West Commercial Real Estate Sub-Market

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg. Size
The Atrium Office Park-Building 7	3900 NW 79 <sup>th</sup> Ave	Delma Realty Services	Office	Renovated	\$16.50 FS	6,500	14,884
Dade National Building	1515 NW 7 <sup>th</sup> St	Call Black's Guide	Office	Completed	\$12.00 + Electric	4,000	27,501
Miami Medical Center	3383 NW 7 <sup>th</sup> St	Amprex Management	Office	Completed	\$12.91	409	28,120
NationsBank Building	3899 NW 7 <sup>th</sup> St	Abood & Associates, Inc.	Office	Completed	\$14.50 FS	1,625	30,000
Airport Office Center	5040 NW 7 <sup>th</sup> St.	Abood & Associates, Inc.	Office	Renovated	\$17.00 FS	3,045	90,000
Doral Executive Office Park I & II	3625-3785 NW 82 <sup>nd</sup> Ave	Adler First Commercial Realty, Inc.	Office	Renovated	\$17.00-17.50	6,200	10,000
2200 Northwest 84 <sup>th</sup> Avenue	2200 NW 84 <sup>th</sup> Av	Easton & Associates	Office	Completed	\$11.95 N	10,000	30,000
Popp Building	3055 NW 84 <sup>th</sup> Av	Codina Realty Services, Inc.	Office	Completed	\$16.50 N	7,500	15,000
Medical Specialties Bldg	8780 SW 92 <sup>nd</sup> St	Capital Realty Services	Office	Completed	\$22.00 FS	1,851	33,200
5200 Waterford	5200 Blue Lagoon Dr	The Hogan Group	Office	Completed	\$25.00-26.00	10,541	34,639
5301 Waterford	5301 Blue Lagoon Dr	The Hogan Group	Office	Completed	\$16.00 NNN	1,282	204,887
Pan American Hospital	5959 Blue Lagoon Dr	Codina Realty Services, Inc.	Office	Completed	\$22.00 FS	35,000	73,832



### Airport West Commercial Real Estate Sub-Market

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg. Size
6100 Waterford	6100 Blue Lagoon Dr	The Hogan Group	Office	Completed	\$14.00 NNN	3,542	163,000
6161 Waterford	6161 Blue Lagoon Dr	The Hogan Group	Office	Completed	\$21.00 G	16,247	82,750
Waterford Center	6205 Blue Lagoon Dr	Trammell Crow Co.	Office	New	\$19.00 NNN	7,034	11,000
6303 Waterford	6505 Blue Lagoon Dr	The Hogan Group	Office	Completed	\$14.00 NNN	8,865	163,455
Airport Corporate Center- Bldg 4	7200 Corporate Center Dr	Insignia/ESG, Inc.	Office	Completed	\$20.50 G	17,975	92,700
Airport Corporate Center- Bldg 5	7205 Corporate Center Dr	Insignia/ESG, Inc.	Office	Completed	\$20.50 G	14,089	81,000
Airport Corporate Center- Bldg 8	7300 Corporate Center Dr	Insignia/ESG, Inc.	Office	Completed	\$22.50	74,100	115,950
Airport Corporate Center- Bldg 9	7600 Corporate Center Dr	Insignia/ESG, Inc.	Office	Completed	\$23.50 G	50,748	137,400
Doral Concourse	8400 Doral Blvd	Cushman & Wakefield	Office	New	\$17.50-18.50 FS	190,000	190,000
Offices of the Americas	7757 W Flagler St	Abood & Associates, Inc.	Office	Renovated	\$12.00 N	8,000	130,000
8260 West Flagler Street	8260 W Flagler St.	8260 Office Center	Office	Completed	\$15.00	1,950	29,600

### Airport West Commercial Real Estate Sub-Market

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg. Size
Flagler West Corporate Park	8700 W Flagler St	Allen Morris Company	Office	Renovated	\$20.00-21.00 FS	14,012	131,334
Midway Professional Building	85 Grand Canal Dr	Call Black's Guide	Office	Completed	\$12.50 FS	520	25,000
The Offices at Kendall Village I	12400 Kendall Dr	Terremark Realty	Office	Under Construction	\$35.00 FS	6,000	70,000
Commerce Park of the Americas	NWC 107 <sup>th</sup> Avenue & NW 25 <sup>th</sup> St	Olympian Realty, Inc.	Land	Proposed	\$653,400-1,089,000	Site Sizes TBD	IU-C
Turnpike & Port St. Lucie Blvd.	Turnpike	Hoven Real Estate	Land	Proposed	\$217,800-827,640	1.25 Acres	
703 Waterford Way	703 Waterford Way	The Hogan Group	Office	Opens May 1, 2001	\$16.00-21.00	247,000	247,000
701 Waterford Way	701 Waterford Way	The Hogan Group	Office	Completed	\$17.50-18.50 NNN	38,352	247,000
Lennar Corporate Center-Phase 1	700 NW 107 <sup>th</sup> Av	Continental Real Estate Companies	Office	Completed	\$21.50 FS	54,000	70,000
Adler Plaza	1400 NW 107 <sup>th</sup> Av	Adler First Commercial Realty Inc.	Office	Renovated	\$19.00 FS	771	40,000
International Mall Plaza	1414 NW 107 <sup>th</sup> Av	Arvida Realty Services	Office	Completed	\$14.00-18.00 N	12,000	41,756
Union Bank Building	2500 NW 107 <sup>th</sup> Av	Easton & Associates	Office	Completed	\$22.00 G	12,000	35,000
Gratigny Central	NW 119 <sup>th</sup> St	Lincoln Property Company	Land	Proposed	\$119,790	Site Sizes TBD	

### Airport West Commercial Real Estate Sub-Market

Building Name	Building Address	Company Name	Bld Type	Bld Status	Rent Range	Total Avail SF	Total Bldg. Size
Southwest 122 <sup>nd</sup> Avenue	SW 122 <sup>nd</sup> Av & SW 125 <sup>th</sup> St	Aura Group	Land	Proposed	\$3,000	Site Sizes: TBD	IU-E
Airport Executive Towers I & II	SW 72 <sup>nd</sup> Ave & SW 12 St	Abood & Associates, Inc.	Office	Renovated	\$16.00-20.00	3,400	22,500
7855 Northwest 12 <sup>th</sup> Street	7855 NW 12 <sup>th</sup> St	Adler First Commercial Realty Inc.	Office	Completed	\$16.30 FS	940	25,400
7875 Northwest 12 <sup>th</sup> Street	7875 NW 12 <sup>th</sup> St	Adler First Commercial Realty Inc.	Office	Completed	\$16.80 FS	3,029	25,400

*Source: Black's Guide to Commercial Real Estate, FIU Metropolitan Center*

## APPENDIX II

### Government:

#### City:

Miami's River of Life Inc  
7900 NE 2nd Ave # 504  
Miami, FL 33138  
305-756-6587

Eisenberg Youth Ctr  
525 NW 62nd St  
Miami, FL 33150  
305-757-7961

Miami Police Dept  
391 NE 15th St  
Miami, FL 33132  
305-579-6038

Little Haiti Net Svc Ctr  
7815 NE 2nd Ave  
Miami, FL 33138  
305-795-2337  
Fax: 305-795-2339

Overtown NET Svc Ctr  
1490 NW 3rd Ave # 6  
Miami, FL 33136  
305-372-4550  
Fax: 305-372-4553

Miami City Cemetery  
1800 NE 2nd Ave  
Miami, FL 33132  
305-579-6938

Upper Eastside NET Svc Center  
6599 Biscayne Blvd  
Miami, FL 33138  
305-795-2330  
Fax: 305-795-2333

Overtown NET Svc Ctr  
1490 NW 3rd Ave # 6  
Miami, FL 33136  
305-372-4550  
Fax: 305-372-4553

Wynwood Edgewater  
101 NW 34th St  
Miami, FL 33127  
305-579-6931  
Fax: 305-579-6933

Upper Eastside NET Svc Ctr  
6599 Biscayne Blvd  
Miami, FL 33138  
Fax: 305-795-2333

#### County:

Alternative Program Inc  
151 NW 60th St  
Miami, FL 33127  
305-758-4187  
Fax: 305-758-1646

Edison-Little River Ctr  
150 NW 79th St  
Miami, FL 33150  
305-751-4342  
Fax: 305-759-2763

Aspira of Florida Inc  
3650 N Miami Ave  
Miami, FL 33127  
305-576-1512  
Fax: 305-576-0810

Edison Little River Neighborhood  
150 NW 79th St  
Miami, FL 33150  
305-758-9662

Community Council For Jewish  
4200 Biscayne Blvd  
Miami, FL 33137  
305-576-1660  
Fax: 305-576-1665

Haitian American Foundation  
5080 Biscayne Blvd  
Miami, FL 33137  
305-758-3338  
Fax: 305-758-3238

Culmer-Overtown Neighborhood  
1600 NW 3rd Ave  
Miami, FL 33136  
305-579-2820  
Fax: 305-576-8640

Housing Opportunity Program  
150 NW 79th St  
Miami, FL 33150  
305-795-1562  
Fax: 305-756-4101

Dade County Advocates-Victims  
7831 NE Miami Ct  
Miami, FL 33138  
305-758-2546  
Fax: 305-756-1347

Jobs For Miami  
7900 NE 2nd Ave # 603  
Miami, FL 33138  
305-759-6511  
Fax: 305-759-7639

Dade County CCS/CENTRO  
144 NW 26th St  
Miami, FL 33127  
305-576-1923  
Fax: 305-576-6446

New Life Family Ctr  
3620 NW 1st Ave  
Miami, FL 33127  
305-573-3333  
Fax: 305-576-5111

Dade County Culmer One-Stop  
1550 NW 3rd Ave  
Miami, FL 33136  
305-571-0406

Office of Community Svc  
2902 NW 2nd Ave  
Miami, FL 33127  
305-547-7661

Dade County Elderly Svc  
4500 Biscayne Blvd # 100  
Miami, FL 33137  
305-576-2511  
Fax: 305-576-8329

One Art Inc  
20 NE 39th St  
Miami, FL 33137  
305-576-7447

Dade County Family & Victim  
2125 Biscayne Blvd  
Miami, FL 33137  
305-571-7750

Safespace Shelter For Women  
7831 NE Miami Ct  
Miami, FL 33138  
305-758-2546  
Fax: 305-756-1347

Dade County Inner City Youth  
525 NW 62nd St  
Miami, FL 33150  
305-962-3517

St Luke's Addiction Recovery  
7707 NW 2nd Ave  
Miami, FL 33150  
305-795-0077  
Fax: 305-795-0030

Dade County Impact Trans Prog  
150 NW 79th St # 400  
Miami, FL 33150  
305-795-1552  
Fax: 305-795-1556

Village South Addiction Treat  
3180 Biscayne Blvd  
Miami, FL 33137  
Fax: 305-576-1348

Dade County Legal Svc Inc  
3000 Biscayne Blvd  
Miami, FL 33137  
305-573-7804

Work America Inc  
3050 Biscayne Blvd # 501  
Miami, FL 33137  
305-576-3333

Dade County Project STOPP  
520 NW 72nd Ln  
Miami, FL 33150  
305-751-7061  
Fax: 305-757-3950

**Parks:**

Athalie Range Park  
525 NW 62nd St  
Miami, FL 33150  
305-757-7961

Legion Memorial Park  
6447 NE 7th Ave  
Miami, FL 33138  
305-758-9027

Dorsey Park  
1701 NW 1st Ave  
Miami, FL 33136  
305-579-6940

Roberto Clemente Park  
101 NW 34th St  
Miami, FL 33127  
305-579-6942

Eaton Park  
6015 NE 4th Ct  
Miami, FL 33137  
305-751-0047

Williams Park  
1717 NW 5th Ave  
Miami, FL 33136  
305-579-6979

**Libraries:**

Edison Center Branch Library  
531 NW 62nd St  
Miami, FL 33150  
305-757-0668  
Fax: 305-757-3975

Little River Branch Library  
160 NE 79th St  
Miami, FL 33138  
305-751-8689  
Fax: 305-757-5237

Lemon City Branch Library  
430 NE 61st St  
Miami, FL 33137  
305-757-0662  
Fax: 305-757-5747

**Non-Profits:**

Arche De Noe Mason Lodge  
7149 NW 2nd Ave  
Miami, FL 33150  
305-754-8077

Haitian Refugee Ctr  
119 NE 54th St  
Miami, FL 33137  
305-757-8538  
Fax: 305-758-2444

Aspira of Florida Inc  
3650 N Miami Ave  
Miami, FL 33127  
305-576-1512  
Fax: 305-576-0810

Irving Cypen Tower  
5100 NE 2nd Ave  
Miami, FL 33137  
305-756-8583  
Fax: 305-762-1505

Association/Development/Except  
2801 N Miami Ave  
Miami, FL 33127  
305-573-3737  
Fax: 305-573-8393

Association-Retarded Citizens  
5555 Biscayne Blvd  
Miami, FL 33137  
305-759-8500  
Fax: 305-754-9223

Association-Retarded Citizens  
5555 Biscayne Blvd  
Miami, FL 33137  
305-759-8500  
Fax: 305-754-9223

Black Economic Development Inc  
6015 NW 7th Ave Rear  
Miami, FL 33127  
305-751-8934  
Fax: 305-751-1619

Community Council For Jewish  
4200 Biscayne Blvd  
Miami, FL 33137  
305-576-1660  
Fax: 305-576-1665

Cushman School  
592 NE 60th St  
Miami, FL 33137  
305-757-1966  
Fax: 305-757-1632

De Hostos Senior Ctr  
2902 NW 2nd Ave  
Miami, FL 33127  
305-573-6220  
Fax: 305-573-2193

Direct Action & Research Trng  
314 NE 26th Ter  
Miami, FL 33137  
305-576-8020

Foster Care Review Inc  
3050 Biscayne Blvd # 900  
Miami, FL 33137  
305-573-6665  
Fax: 305-573-6722

Kidco Child Care I  
221 NE 36th St  
Miami, FL 33137  
305-573-1515  
Fax: 305-573-3216

Miami-Dade Neighborhood Housing  
7100 Biscayne Blvd Fl 2  
Miami, FL 33138  
305-751-5511  
Fax: 305-751-2228

Miami Jewish Home & Hospital  
5200 NE 2nd Ave  
Miami, FL 33137  
305-751-8626  
Fax: 305-762-1436  
Web Site: [WWW.HCTASSISTEDLIVING.COM](http://WWW.HCTASSISTEDLIVING.COM)

Miami Rescue Mission  
2159 NW 1st Ct  
Miami, FL 33127  
305-571-2211  
Fax: 305-571-2244  
Web Site: [WWW.MIAMIRESCUEMISSION.COM](http://WWW.MIAMIRESCUEMISSION.COM)

National Assn-Letter Carriers  
70 NE 39th St  
Miami, FL 33137  
305-576-0464

National Assn of Chiefs-Police  
3801 Biscayne Blvd  
Miami, FL 33137  
305-573-0070  
Fax: 305-573-9819

New Directions Employment Svc  
5555 Biscayne Blvd  
Miami, FL 33137  
305-757-2540  
Fax: 305-757-2540

New Washington Heights Dev  
1600 NW 3rd Ave  
Miami, FL 33136  
305-573-8217

OIC of Dade County  
4500 Biscayne Blvd # 150  
Miami, FL 33137  
305-576-0242  
Fax: 305-576-3142

Greater Miami Chamber-Commerce  
1601 Biscayne Blvd Ballroom Lv  
Miami, FL 33132  
305-350-7700  
Fax: 305-374-6902  
Web Site: [WWW.GREATERMiami.COM](http://WWW.GREATERMiami.COM)

**Private Sector Businesses:**

**Banks:**

Kantor, Charles  
1550 Biscayne Blvd,  
Miami Beach, Fl 33132,  
(305) 358-5300

Savings Of America-Real Estate Loan Info-S Miami  
Beach  
3050 Biscayne Blvd,  
Miami, Fl 33137,  
(305) 937-6700

Totalbank  
1730 Biscayne Blvd,  
Miami, Fl 33132,  
(305) 358-0241

Savings Of America-Real Estate Loan Info-Surfside  
3050 Biscayne Blvd,  
Miami, Fl 33137,  
(305) 937-6700

Republic National Bank  
1490 NW 3rd Ave,  
Miami, Fl 33136,  
(305) 573-4191

Capital Bank  
3550 Biscayne Blvd,  
Miami, Fl 33137,  
(305) 576-2984

Capital Bank  
3550 Biscayne Blvd,  
Miami, Fl 33137,  
(305) 576-2984

Capital Bank  
3550 Biscayne Blvd,  
Miami, Fl 33137,  
(305) 576-2984

Safra Republic Bank Division Of Republic Bank  
For Savings  
2954 Biscayne Blvd,  
Miami, Fl 33137,  
(305) 931-6700

Safra Republic Bank Division Of Republic Bank For  
Savings  
2954 Biscayne Blvd,  
Miami, Fl 33137,  
(305) 931-6700

Savings Of America-Aventura-New Account  
Information  
3050 Biscayne Blvd,  
Miami, Fl 33137,  
(305) 932-6435

**Department Stores:**

Keilin's Discount Inc  
2504 Biscayne Blvd  
Miami, FL 33137  
305-576-5464



**Pharmacies:**

AIMS Rx  
225 NE 34th St # 207  
Miami, FL 33137  
305-438-1127

Puerto Rico Pharmacy  
375 Northeast 54th Street # 3  
Miami, FL 33137  
305-758-1984  
Fax: 305-758-8714  
Screen Name:xxluckycarmsxx  
URL:<http://card.netscape.com/xxluckycarmsxx>

Cabana Pharmacy  
119 NW 29th St  
Miami, FL 33127  
305-573-8172  
Fax: 305-573-2383

Walgreen's Drug Store  
5418 NE 2nd Ave  
Miami, FL 33137  
305-751-9615

Cinderella Pharmacy  
128 NE 54th St  
Miami, FL 33137  
305-751-2783  
Fax: 305-758-3522

Walgreen's Drug Store  
161 NE 54th St  
Miami, FL 33137  
305-751-961

Eckerd Drug  
4800 Biscayne Blvd  
Miami, FL 33137  
305-576-4347

Walgreen's Drug Store  
3103 Biscayne Blvd  
Miami, FL 33137  
305-573-0650

Publix Supermarkets Inc  
4870 Biscayne Blvd  
Miami, FL 33137  
305-573-8601

**Day care:**

ABC Day Care Ctr  
6505 NW 2nd Ave  
Miami, FL 33150  
305-757-4771  
Fax: 305-757-4758

Family Christian Assn  
6501 N Miami Ave  
Miami, FL 33150  
305-759-2545  
Fax: 305-754-7185

ABC Day Care Ctr  
6521 NW 2nd Ave  
Miami, FL 33150  
305-757-4713  
Fax: 305-757-4758

Family Christian Assn of Amer  
150 NE 42nd St  
Miami, FL 33137  
305-573-1443  
Fax: 305-573-4894

Atelier Saint Joseph  
7959 NE 2nd Ave  
Miami, FL 33138  
305-751-9585

Kidco Child Care I  
221 NE 36th St  
Miami, FL 33137  
305-573-1515  
Fax: 305-573-3216

Ball of Fire Paradise Daycare  
4200 NW 2nd Ave  
Miami, FL 33127  
305-576-7044  
Fax: 305-576-4464

Kidco Child Care II  
3630 NE 1st Ct  
Miami, FL 33137  
305-576-6990  
Fax: 305-576-5321

Bola Childcare & Learning Ctr  
7929 NE 1st Ave  
Miami, FL 33138  
305-751-4191  
Fax: 305-759-7455

Cecile Day Care  
183 NE 57th St  
Miami, FL 33137  
305-751-7437  
Fax: 305-751-3293

Cherish Child Care Ctr  
4201 NW 2nd Ave  
Miami, FL 33127  
305-758-9446  
Fax: 305-576-2009

Children's World Daycare  
5100 NW 2nd Ave  
Miami, FL 33127  
305-757-0661

Dade County CCS/CENTRO  
144 NW 26th St  
Miami, FL 33127  
305-576-1923  
Fax: 305-576-6446

YMCA  
401 NW 71st St  
Miami, FL 33150  
305-759-3317  
Fax: 305-759-1932

**Youth centers:**  
Aspira of Florida Inc  
3650 N Miami Ave  
Miami, FL 33127  
305-576-1512  
Fax: 305-576-0810

Pridelines Youth Svc  
180 NE 19th St  
Miami, FL 33132  
305-571-9601

Project Stop  
520 NW 72nd Ln  
Miami, FL 33150  
305-751-7061

Kiddie Kop Child Care Ctr  
231 NW 52nd St  
Miami, FL 33127  
305-757-1722

Kiddietown Academy  
2915 Biscayne Blvd  
Miami, FL 33137  
305-576-7669

Lincoln-Marti Schools  
335 NE 61st St  
Miami, FL 33137  
305-759-2558

Mc Donald Playroom Inc  
6375 NW 2nd Ave  
Miami, FL 33150  
305-754-1132

My Kid's Place Christian Ctr  
7777 NE 3rd Ct  
Miami, FL 33138  
305-756-1003  
Fax: 305-756-1003

The Inner City Youth Center, Inc.  
525 Northwest 67 Street  
Miami, FL 33150  
305-758-0700  
Fax: 305-758-0785  
Screen Name: wanicyc  
Netbusiness URL: <http://card.netscape.com/wanicyc>

Town Park Neighborhood Network  
535 NW 19th St  
Miami, FL 33136  
305-573-8211

## **Entertainment:**

### **Art Galleries:**

Adamar Fine Arts  
177 NE 39th St  
Miami, FL 33137  
305-576-1355  
Fax: 305-576-0551  
Web Site:

[WWW.ADAMARGALLERY.COM](http://WWW.ADAMARGALLERY.COM)

Gallery Antigua  
5130 Biscayne Blvd  
Miami, FL 33137  
305-759-5355

Archival Editions Ltd Inc  
3221 NE 2nd Ave  
Miami, FL 33137  
305-573-0720  
Fax: 305-573-2666  
Web Site:

[WWW.AFREEGIFT4YOU.COM](http://WWW.AFREEGIFT4YOU.COM)

Leah's Gallery Inc  
191 NE 40th St # 100  
Miami, FL 33137  
305-573-9700  
Fax: 305-573-9701

Artprintoncanvas.com  
3900 North Miami Avenue  
Miami, FL 33127  
305-438-3737  
Screen Name: artprintoncanvas  
URL:

<http://card.netscape.com/artprintoncanvas>

L'Espritdes Arts  
1 NE 40th St  
Miami, FL 33137  
305-573-6003

Barbara Gillman Gallery  
5582 NE 4th Ct  
Miami, FL 33137  
305-759-9155

Next Future Classix Inc  
2247 NW 1st Pl  
Miami, FL 33127  
305-573-4444

Bernice Steinbaum Gallery  
3550 N Miami Ave  
Miami, FL 33127  
305-573-2700

Santo Gallery  
7623 Biscayne Blvd  
Miami, FL 33138  
305-751-8030

Broadway Art & Framing  
7551 Biscayne Blvd  
Miami, FL 33138  
305-754-1773  
Fax: 305-754-1102

Schama/Tolman Studio Gallery  
223 NE 27th St  
Miami, FL 33137  
305-438-0220

Cafe Buena Vista  
130 NE 40th St # 10  
Miami, FL 33137  
305-573-5521  
Fax: 305-573-4053

Side Roads Publications  
177 NE 39th St  
Miami, FL 33137  
305-438-8828  
Fax: 305-576-0551  
Web Site: [WWW.SIDEROADSPUB.COM](http://WWW.SIDEROADSPUB.COM)

Cronos Art  
6905 Biscayne Blvd  
Miami, FL 33138  
305-757-5422

Silvana Facchini Gallery Inc  
35 NE 38th St  
Miami, FL 33137  
305-576-4454

Design Gallery of the Americas  
1 NE 40th St # 7  
Miami, FL 33137  
305-573-6508

Turning Point Gallery  
165 NE 24th St  
Miami, FL 33137  
305-576-9164  
Web Site: [WWW.JONASGERARD.COM](http://WWW.JONASGERARD.COM)

Diaspora Vibe Gallery  
561 NW 32nd St  
Miami, FL 33127  
305-573-7675

Tyler Galleries  
6914 Biscayne Blvd  
Miami, FL 33138  
305-759-4242

Dorsch Gallery  
151 NW 24th St  
Miami, FL 33127  
305-576-1278

**Museums:**

Rubell Family Collection  
95 NW 29th St  
Miami, FL 33127  
305-573-6090

**Theatres and Movies:**

Miami Light Project  
3000 Biscayne Blvd Lbby  
Miami, FL 33137  
305-576-4350  
Web Site: [WWW.MIAMILIGHTPROJECT.COM](http://WWW.MIAMILIGHTPROJECT.COM)

**Health and Social Services:**

**Social Services:**

A Women's Place  
235 NE 17th St  
Miami, FL 33132  
305-358-2063  
Fax: 305-374-0027

Haitian American Community  
100 NE 84th St  
Miami, FL  
305-751-3429

Alternative Program Inc  
151 NW 60th St  
Miami, FL 33127  
305-758-4187  
Fax: 305-758-1646

Information & Referral Svc  
4200 Biscayne Blvd  
Miami, FL 33137  
305-576-4000  
Fax: 305-576-9571

Areito Inc  
28 NE 54th St  
Miami, FL 33137  
305-757-3113

JESCA  
191 NE 75th St  
Miami, FL 33138  
305-756-1197

Association-Retarded Citizens  
5555 Biscayne Blvd  
Miami, FL 33137  
305-759-8500  
Fax: 305-754-9223

JESCA  
150 NE 69th St  
Miami, FL 33138  
305-754-5428

Biscayne Institute Inc  
35 NE 49th St  
Miami, FL 33137  
305-759-0083

One Stop Career Ctr  
5400 NW 2nd Ave  
Miami, FL 33127  
305-636-2274

Catholic Charities Legal Svc  
119 NE 62nd St  
Miami, FL 33138  
305-758-3439

Pierre Toussaint Haitian Cthlc  
130 NE 62nd St  
Miami, FL 33138  
305-758-2462  
Fax: 305-758-8216

Center For Juvenile Delinquent  
7251 NE 2nd Ave  
Miami, FL 33138  
305-757-1511

Project Good Help  
7525 NW 2nd Ave  
Miami, FL 33150  
305-758-4197  
Fax: 305-758-5099

Children's Home Society SAFE  
3000 Biscayne Blvd # 210  
Miami, FL 33137  
305-573-2141  
Fax: 305-573-3080

PWA Coalition of Dade  
3892 Biscayne Blvd  
Miami, FL 33137  
305-573-6010  
Fax: 305-576-4470

Community Council For Jewish  
4200 Biscayne Blvd  
Miami, FL 33137  
305-576-1660  
Fax: 305-576-1665

Salvation Army  
2236 NW Miami Ct  
Miami, FL 33127  
305-573-4200  
Fax: 305-573-4208

Florida Immigrant Advocacy Ctr  
3000 Biscayne Blvd  
Miami, FL 33137  
305-573-1106

Share Inc  
5000 Biscayne Blvd # 102  
Miami, FL 33137  
305-571-9175

Foster Care Review Inc  
3050 Biscayne Blvd # 900  
Miami, FL 33137  
305-573-6665  
Fax: 305-573-6722

Work America Inc  
3050 Biscayne Blvd # 501  
Miami, FL 33137  
305-576-3333

Genesis Program  
3675 S Miami Ave  
Miami, FL 33133  
305-856-1043  
Fax: 305-856-1633

YMCA  
401 NW 71st St  
Miami, FL 33150  
305-759-3317  
Fax: 305-759-1932

Hadassah Miami Region  
4200 Biscayne Blvd  
Miami, FL 33137  
305-576-4447  
Fax: 305-576-4448

**Political:**

Democratic Party-Dade County  
3550 Biscayne Blvd  
Miami, FL 33137  
305-572-9573

Socialist Workers Party  
4582 NE 2nd Ave  
Miami, FL 33137  
305-573-3355

People For the American Way  
2915 Biscayne Blvd # 301  
Miami, FL 33137  
305-573-7329

**Camps:**

Lincoln-Marti Schools  
335 NE 61st St  
Miami, FL 33137  
305-759-2558

**Doctors:**

Alvarez, Jaime MD  
1601 Biscayne Blvd  
Miami, FL 33132  
305-373-4792

Sanna Medical Ctr  
1444 Biscayne Blvd # 309  
Miami, FL 33132  
305-358-7574

Benoit, Marta E MD  
5211 NE 2nd Ave  
Miami, FL 33137  
305-751-1293

Shah, Chandrakant MD  
1444 Biscayne Blvd # 309  
Miami, FL 33132  
305-358-7574

Cadet, Jules A MD  
128 NE 54th St  
Miami, FL 33137  
305-754-1675

Blondet, Ricardo H MD  
5200 NE 2nd Ave  
Miami, FL 33137  
305-757-7121

Etienne, Edna MD  
375 NE 54th St # 1  
Miami, FL 33137  
305-758-3835

Douglas Gardens Medical Ctr  
5200 NE 2nd Ave  
Miami, FL 33137  
305-757-7121

Ikpe, Nsidibe DO  
6630 Biscayne Blvd  
Miami, FL 33138  
305-754-8966

Michel, Jack MD  
8000 Biscayne Blvd # 11  
Miami, FL 33138  
305-284-7777

Jilou Medical Ctr  
375 NE 54th St # 1  
Miami, FL 33137  
305-758-3835

Samos, Luis MD  
5200 NE 2nd Ave  
Miami, FL 33137  
305-757-7121

Legion Park Medical Ctr  
6630 Biscayne Blvd  
Miami, FL 33138  
305-754-8966

Albert, Lucien MD  
5811 N Miami Ave  
Miami, FL 33127  
305-758-2700

Pinel Medical Ctr Inc  
128 NE 54th St  
Miami, FL 33137  
305-754-1675

Poliard, Joel H MD  
5000 NE 2nd Ave  
Miami, FL 33137  
305-751-1105

### **Hospitals:**

Miami Jewish Home & Hospital  
5200 NE 2nd Ave  
Miami, FL 33137  
305-751-8626  
Fax: 305-762-1436  
Web Site: [WWW.HCTASSISTEDLIVING.COM](http://WWW.HCTASSISTEDLIVING.COM)

### **Clinics:**

Community Partnership-Homeless  
1550 N Miami Ave  
Miami, FL 33136  
305-329-3000  
Fax: 305-329-3051

Orvi Medical Ctr  
3212 NE 2nd Ave  
Miami, FL 33137  
305-573-3077  
Fax: 305-573-3300

Douglas Gardens Medical Ctr  
5200 NE 2nd Ave  
Miami, FL 33137  
305-757-7121

Raphael Center  
286 NE 39th St  
Miami, FL 33137  
305-573-0883  
Fax: 305-573-0087

Integrated Plus Ctr  
3800 N Miami Ave  
Miami, FL 33127  
305-438-9966

Safe Passage Community Dev  
5046 Biscayne Blvd  
Miami, FL 33137  
305-756-1519  
Fax: 305-756-6011

Kiwanis Clinic  
8000 Biscayne Blvd # 101  
Miami, FL 33138  
305-759-4778

St John Clinic & Medical Ctr  
161 NW 29th St  
Miami, FL 33127  
305-576-0232  
305-573-1100

Miami Urgent Care & Rehab Ctr  
3800 N Miami Ave  
Miami, FL 33127  
305-576-4800

Sunrise Medical Ctr  
5211 NE 2nd Ave  
Miami, FL 33137  
305-751-1293  
305-758-8785

New Horizons Comm Mental Hlth  
7505 NE 2nd Ave  
Miami, FL 33138  
305-759-5262  
Fax: 305-756-5838

Wayne, Christopher DO  
3800 N Miami Ave  
Miami, FL 33127  
305-576-4800

New Horizons Community Mental  
1600 NW 3rd Ave  
Miami, FL 33136  
305-573-1832  
Fax: 305-576-8280

**Mental Health:**

New Horizons Community Mental  
2650 NE 2nd Ave  
Miami, FL 33137  
305-576-3172  
Fax: 305-576-9136

NEW Horizons Mental Health  
45 NW 41st St  
Miami, FL 33127  
305-573-3955

**Nursing Homes:**

Hazel Cypen Tower  
5066 NE 2nd Ave  
Miami, FL 33137  
305-762-1365  
Fax: 305-762-3901

Leo Gelvan & Family Day Ctr  
5200 NE 2nd Ave  
Miami, FL 33137  
305-754-1996

Louis C Fischer Alzheimer's  
5200 NE 2nd Ave  
Miami, FL 33137  
305-759-0359

Miami Jewish Home & Hospital  
5200 NE 2nd Ave  
Miami, FL 33137  
305-751-8626  
Fax: 305-762-1436  
Web Site: [WWW.HCTASSISTEDLIVING.COM](http://WWW.HCTASSISTEDLIVING.COM)

Miami Jewish Home & Hospital  
6447 NE 2nd Ave  
Miami, FL  
305-751-8626