

AGENDA
SPECIAL MEETING OF THE
LIVING WAGE ADVISORY BOARD MEETING
June 27, 2022 - 11:00 a.m.

Broward County Governmental Center Building
115 S. Andrews Avenue, Room 302
Fort Lauderdale, FL

- I. Call to Order and roll call.
- II. Introductions as necessary.
- III. Review and provide comments/recommendations to the Living Wage Ordinance.
- IV. Discussion and instruction to staff.
- V. Adjourn.

1. Guidelines for **public participation**:

- If you plan on attending this meeting, click on the link below and complete the Guest Speaker Form.

[Guest Speaker Form](#)

- The form must be submitted electronically, at least two days before the meeting to:

lugarcia@broward.org.

2. If you have any questions, please contact Lucy Garcia, Advisory Board Minutes Coordinator at lugarcia@broward.org or (954) 357-6071.




MONICA CEPERO, County Administrator

115 S. Andrews Avenue, Room 409 • Fort Lauderdale, Florida 33301 • 954-357-7354 • FAX 954-357-7360

MEMORANDUM

DATE: June 8, 2022

TO: Living Wage Advisory Board

FROM: Monica Cepero, County Administrator 

SUBJECT: Living Wage Advisory Board (LWAB)

During my recent County Commissioner briefings, I was asked to share two documents recently submitted to the County Commission regarding the County's Living Wage Ordinance. Attached are the following two documents:

- Memorandum dated May 16, 2022, regarding Contracted Workers Protection Proposal from representatives of the Service Employees International Union (SEIU) 32BJ.
- Memorandum dated May 20, 2022, regarding Living Wage Report – Additional Information (from Living Wage Workshop – March 1, 2022) - which was provided by County Administration for the May 24th Budget Workshop.

The Living Wage Advisory Board (LWAB) is being asked to review these documents and provide any comments or recommendations for the Board's possible future consideration to Director of Purchasing Bob Gleason (rgleason@broward.org) who is also available for any questions you may have.

Thank you in advance for your time, and the County looks forward to your feedback.

Attachments

c: Board of County Commissioners
Kimm Campbell, Assistant County Administrator
Kevin B. Kelleher, Assistant County Administrator
Andrew Meyers, County Attorney
George Tablack, Chief Financial Officer
Robert E. Gleason, Director, Purchasing Division

MEMORANDUM

RE: Contracted Worker Protections Proposal
To: Monica Cepero, County Administrator, Broward County
Cc: Broward County Mayor and Commissioners
From: Pat Lippold, Florida Political Director, SEIU 32BJ
Helene O'Brien, Florida District Director, SEIU 32BJ
Date: May 16, 2022

Broward County's contracted service workers have served the public heroically during the depths of the Covid-19 pandemic, serving as frontline workers to ensure the county could continue to provide public services. However, just as we emerge from one crisis we enter into another. Inflation has soared, reaching 9.8% in the Broward area over the last 12 months.¹ Moreover, we have seen inflation hit certain essentials such as groceries, utilities and housing particularly hard.² These price increases have a disproportionately harsh impact on low-income workers who have more limited disposable incomes. Although, beginning on January 1, 2020, Broward's living wage has been annually adjusted, these adjustments are capped at the *lowest* level of the following: (1) CPI, (2) 3%, or (3) the percentage across-the-board compensation increase provided by the County to unrepresented County employees.³ This means that in real wages, Broward County's contracted service workers have seen their compensation go down while the risks of their jobs went up. Moreover, as the state's minimum wage heads towards \$15.00 in 2026, the difference between the state minimum wage and Broward's living wage will diminish, meaning that the living wage will lose some of its power to increase worker retention and ensure an experienced workforce able to provide quality services to the County and the public.

Broward County's contracted service workers also face some continuing problems that have simple legislative solutions.

The current living wage provides for a single living wage rate. This might be appropriate to ensure that all covered workers are provided with a certain minimum compensation permitting them to achieve a minimally adequate standard of living in order to meet the County's proprietary interests certain workers needing licenses or specialized training, that can easily obtain higher wages elsewhere, should be compensated at a higher tier.

Broward County's direct employees currently accumulate sick leave at a rate of 8 hours per month or a total of 96 hours/12 days in a year.⁴ Direct employees can also use a maximum of 240 hours of paid

¹ https://www.bls.gov/regions/southeast/news-release/consumerpriceindex_miami.htm

² David Harrison, *Where Inflation is Hitting the Hardest: Prices of Groceries, Utilities Rent Jump*, The Wall Street Journal (Feb. 10, 2022), <https://www.wsj.com/articles/where-inflation-is-hitting-hardest-prices-of-groceries-utilities-rent-jump-11644519819>

³ §26-102(e) of the Code of Broward County;
https://library.municode.com/fl/broward_county/codes/code_of_ordinances?nodeId=PTIICOOR_CH26PE_ARTVIII_LWA_S26-102LIWA

⁴ §14-230(c) of the Code of Broward County;
https://library.municode.com/fl/broward_county/codes/administrative_code?nodeId=CH14ORCISERURE_PTXIXATL_E_14.230SILE

parental leave.⁵ Direct employees also receive 9 paid holidays.⁶ This is sound public policy. Workers who are able to take paid time off to recover from illness, to seek preventive care, or just to de-stress are then able to come back fully able to contribute at work. Such policies are a win-win for both employers and employees.⁷ This logic applies to workers whether they are directly employed or subcontracted. For example, Miami-Dade County has recently required its security contractors to provide at least 56 hours of paid sick leave.⁸

Contracted workers are at recurring risk of losing their jobs every time there is a flip from one contractor to another. Research shows that involuntary job termination can result in increases in cardiovascular disease, hospitalization, self-destructive behaviors, suicide and mortality.⁹ The loss of a job can result in the loss of a worker's health insurance and due to the expense of medical care those without health insurance are less likely to seek medical attention and therefore put their health at risk.¹⁰ The negative effects are not limited to the workers, but extend to their families with strained relationships and a greater likelihood of grade repetition, dropout and expulsion from school for their children.¹¹

Lastly, many governmental entities insert labor peace provisions into their contracts thus helping to ensure that there is labor peace and an uninterrupted provision of services.

Therefore we propose that Broward County enact legislation to achieve the following policy outcomes:

1. The living wage advisory board currently reviews the implementation and effectiveness of the living wage article and may advise the Board of County Commissioners on any recommendations for amendments to the living wage law. We propose that the advisory board's power to make recommendations be further spelled out and the advisory board be asked to make annual recommendations on wages and benefits and shall solicit comments or hold a public hearing . County commissioners would still have the ability to approve or veto the recommendations;
2. Amend the living wage to increase the minimum wage component to \$16.00/hour and \$22.00/hour for work requiring licensing or specialized training as determined by the director of purchasing;
3. Amend the living wage to increase the health care benefit amount to \$4.60/hour, the same level provided for under the federal Service Contract Act;¹²

⁵ §14-232 of the Code of Broward County;

https://library.municode.com/fl/broward_county/codes/administrative_code?nodeId=CH14ORCISERURE_PTXIXATLE_14.232PAPALE

⁶ §14-227 of the Code of Broward County;

https://library.municode.com/fl/broward_county/codes/administrative_code?nodeId=CH14ORCISERURE_PTXIXATLE_14.227HO

⁷ Claudia Calderon Machicado, *The Business Case for Paid Sick Leave and Paid Sick Days*, American Progress (April 17, 2014), <https://www.americanprogress.org/article/the-business-case-for-paid-leave-and-paid-sick-days/>

⁸ §2-8.11 of the Code of Miami Dade County.

⁹ Jennie E. Brand, *The Far Reaching Impact of Job Loss and Unemployment*, 45 Annual Review of Sociology, 359 (2015), <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4553243/>

¹⁰ Jennifer Tolbert, et al., *Key Facts about the Uninsured Population*, Kaiser Family Foundation (Dec 13, 2019), <https://www.kff.org/uninsured/issue-brief/key-facts-about-the-uninsured-population/>

¹¹ *Id.*

¹² <https://www.dol.gov/agencies/whd/government-contracts/service-contracts/sf98/aam237>

4. Amend the living wage to index both the living wage and health care benefit to the consumer price index as applied to the Broward County area by deleting the current limitations on CPI indexing;
5. Amend the living wage poster to clarify that employers providing benefits are in compliance with the law and to give the authority to approve the law's explanatory poster to the living wage advisory board;
6. Enact a law to provide 56 hours or 7 days of paid time off to the same set workers covered by the living wage; and
7. Enact a law requiring, for workers covered by the living wage, new contractors continuing the services of a previous contractor to retain the existing workforce for the first 90 days of the new contract and to dismiss them during those first 90 days only for just cause. Such a law should include a requirement that the incumbent contractor send a list of affected workers to the successor contractor and to any collective bargaining agent (we can provide good models);
8. Enact a law to require labor peace provisions in contracts for the services covered under the living wage law.

Thank you so much for your consideration of this proposal.

If you have any questions, feel free to contact me at plippold@seiu32bj.org or (305) 753-9090.



MONICA CEPERO, County Administrator

115 S. Andrews Avenue, Room 409 • Fort Lauderdale, Florida 33301 • 954-357-7354 • FAX 954-357-7360

MEMORANDUM

DATE: May 20, 2022

TO: Mayor, Vice-Mayor, and Board of County Commissioners

FROM: Monica Cepero, County Administrator *Monica Cepero*

RE: Living Wage Report – Additional Information (from Living Wage Workshop, March 1, 2022)

On March 1, 2022, the Broward County Board of County Commissioners (Board) held a Living Wage Workshop (Workshop) to discuss Living Wage hourly rates, based on previous Board discussion in December 2021. Staff reported on the Living Wage covered services and contracts, ordinance history, rates, comparison to other entities' rates and federal guidelines, and the estimated general fund cost and associated millage increase for different rate increases (Attachment 1). The full presentation can be viewed at [Broward County Living Wage Ordinance Workshop Presentation](#).

At the Workshop, the Board requested information on current Broward County private industry employment data (for Living Wage covered services), United Way's "ALICE" report data, and Broward County's commissioned study from Florida International University (FIU) on affordable housing for additional supporting information. The requested information is provided below.

Private Industry Occupational Wage Data

The Office of Economic and Small Business Division (OESBD) worked with the Greater Fort Lauderdale Alliance (Alliance) to review two sets of occupational wage data for private industry employment data (for Living Wage covered services): 1) the most recent Median Wage (observed) from the Bureau of Labor and Statistics (BLS) (data released March 30, 2022 for data as of May 2021); and 2) Median Wage of Job Postings in 2022 from EMSI Burning Glass (EMSI).

The nine occupation groups reviewed between both data sets are identical. The two sets of wage data were reviewed to address any potential changes as a result of an evolving labor market as the BLS data is effective as of May 2021 (the most recent wage data from BLS which was released March 30, 2022). The EMSI data source offers more recent data (effective as of February 2022) on current wage rates, although from a smaller sample size than the BLS. The data is compiled for the Miami-Fort Lauderdale-West Palm Beach, FL Metropolitan Statistical Area (MSA). Refer to **Broward County Living Wage**

Ordinance Occupational Wage Analysis Report (Attachment 2) dated May 18, 2022 for detailed information.

It is important to note that since BLS uses actual (or observed) Median Wages and EMSI uses data from job postings, a direct comparison between the two different data sets is not possible. However, both sets of data can be useful in assessing the County's Living Wage Rates (without and with health benefits). The following summarizes the results:

2021 Observed Median Wages (from BLS)

The median wage rate from BLS was compared against the County's Living Wage Rate for those positions without and with the health benefits as required by the Living Wage Ordinance as of 2021 (\$17.05 per hour and \$13.61 per hour respectively).

Without Health Benefits

In 2021, the median wage of five occupation groups (representing 89% of covered services employees) were below the County's Living Wage Rate (without health benefits, \$17.05):

- Cooks
- Janitors and cleaners, including First-Line Supervisors
- Landscaping and Pest Control including First-Line supervisors
- Security Guards
- Vehicle Operators

Meanwhile, the median wage of the remaining four occupation groups (representing 11% of covered services employees) were above the County's Living Wage Rate (without health benefits, \$17.05):

- Installation, Maintenance and Repair
- Office and Administrative Support
- Printing
- Refuse and Recyclable Material Collectors

With Health Benefits

In 2021, the median wage of two occupation groups (representing 64% of covered services employees) were below the County's Living Wage Rate (with health benefits, \$13.61):

- Janitors and Cleaners
- Vehicle Operators

Meanwhile, the median wage of the remaining seven occupation groups (representing 36% of covered services employees) were above the County's Living Wage Rate (with health benefits, \$13.61):

- Cooks
- Installation, Maintenance and Repair
- Landscaping and Pest Control

- Office and Administrative Support
- Printing
- Refuse and Recyclable Material Collectors
- Security Guards

2022 Job Posting Median Wages (from EMSI)

The median wage rate from EMSI was compared against the County’s Living Wage Rates without and with health benefits (\$17.56 per hour and \$14.02 per hour respectively).

Without Health Benefits

In 2022, the median wage of eight occupation groups (representing 93% of covered services employees) were below the County’s Living Wage Rate (without health benefits, \$17.56 per hour) and are on average 16% lower than the County’s Living Wage Rate (without benefits):

- Cooks
- Janitors and cleaners, including First-Line Supervisors
- Landscaping and Pest Control including First-Line supervisors
- Office and Administrative Support
- Printing
- Refuse and Recyclable Material Collectors
- Security Guards
- Vehicle Operators

Meanwhile, the median wage of the remaining one occupation group (Installation, Maintenance and Repair), representing 7% of covered services employees, was above the County’s Living Wage Rate (without health benefits) and has median wages 10% higher than the 2022 Living Wage rate (without health benefits).

With Health Benefits

In 2022, the median wage of two occupation groups (Janitors & Cleaners and Security Guards), representing approximately 68% of County covered service employees are below Broward County’s Living Wage Ordinance (with health benefits; \$14.02) and have median wages 17% lower than the 2022 Living Wage rate (with health benefits).

Meanwhile, the median wage of the remaining seven occupation groups (representing 32%) was above the County’s Living Wage Rate (with health benefits) and are on average 3% higher than the Living Wage Rate (with health benefits):

- Cooks
- Installation, Maintenance, and Repair
- Janitors and cleaners
- Landscaping and Pest Control
- Office and Administrative Support
- Printing

- Refuse and Recyclable Material Collectors
- Security Guards
- Vehicle Operators

Charts presenting the above data can be found in **Exhibits 3 and 4** in the Broward County Living Wage Ordinance Occupational Wage Analysis (Attachment 2).

It is noted that the Living Wage contracts for the Installation, Maintenance and Repair occupation group are generally covered by Collective Bargaining Agreements based on the trade-specific industry (ex. HVAC, elevators/escalators technicians, etc.) which are generally higher paying.

Broward County United Way's ALICE Report

The United Way publishes the ALICE Report; ALICE is an acronym that stands for Asset Limited, Income Constrained, Employed - households with income above the Federal Poverty Level but below the basic cost of living. Families who live below the ALICE threshold have limited resources needed to pay for rent, childcare, and other essentials.

The current available report for Florida was published in April 2020, based on data/information from 2018. The United Way of Broward County identified that approximately 37% of Broward County households were below the ALICE threshold and approximately 13% were at poverty level, based on 2018 data. A more recent report is not available (and no available estimated time for an updated next report). The most recent report can be found at: [2020 ALICE Report](#).

Broward County Affordable Housing Needs Assessment and Commercial Linkage Fee Nexus Study by FIU

The Metropolitan Center at Florida International University (FIU) completed a 2018 Broward County Affordable Housing Needs Assessment. The report provided key demand and supply factors impacting the production and availability of affordable housing in Broward County. The full report can be found at: [2018 Broward County Affordable Housing Needs Assessment](#).

The Metropolitan Center is in the process of completing the 2022 Broward County Affordable Housing Needs Assessment; it is estimated to be completed this summer. However, the Metropolitan Center was presented at The Prosperity Partnership Housing Affordability Summit, held on May 5, 2022. The presentation is attached (Attachment 3).

Additionally, Broward County commissioned the Metropolitan Center at FIU to complete a Commercial Linkage Fee Nexus Study. The most recent Nexus Study was issued in 2019 (and previous studies/reports were issued in 2014 and 2007). The purpose of the 2019 study was to determine whether there exists a reasonable connection (linkage) between the construction of new workplace buildings in Broward County and the demand

for affordable housing by the new employees who work within these buildings. The nexus analysis is a calculation of the potential number of housing units by affordability level associated with the new workers expected in each new commercial building type. The nexus cost is the amount required to mitigate the affordability gap for worker housing units at each household income affordability level. The previous report can be found at: [FIU Commercial Linkage Fee Nexus Study](#) dated 2019.

cc: Kimm Campbell, Assistant County Administrator
Kevin Kelleher, Assistant County Administrator
George Tablack, CFO and Director of Finance and Administrative Services
Norm Foster, Director, Office of Budget and Management
Sandy Michael McDonald, Director, Office of Economic & Small Business Dev.
Robert E. Gleason, Director, Purchasing Division
David Kahn, Director, Human Resources Division
Constance Mangan, Purchasing Manager, Purchasing Division
Christine Calhoun, Purchasing Manager, Purchasing Division
Mark Cassidy, Program/Project Coordinator Sr, Office of Econ. & Small Bus. Dev.

Attachments

- Attachment 1: Estimated Cost of Increasing Living Wage Chart from Broward County Living Wage Ordinance Workshop on March 1, 2022 (page 20)
- Attachment 2: Broward County Living Wage Ordinance Occupational Wage Analysis Report (May 2022)
- Attachment 3: 2022 Broward County Affordable Housing Needs Assessment presentation at The Prosperity Partnership Housing Affordability Summit, held on May 5, 2022

Estimated Cost of Increasing Living Wage

Based on threshold amount (excluding Airport Covered Services), using a weighted average of labor costs:

Option	Model	Living Wage Rate	% Inc. 2021 LW (\$13.61)	County Contracts				County Employee Fiscal Impact	Total Fiscal Impact	Estimated Millage Rate Increase **
				Fiscal Impact (GF)	Fiscal Impact (Ent/Non-GF)	Fiscal Impact (All Funds)	Adjusted Fiscal Impact (+45%)*			
	Current	\$14.02	3.0%	--	--	--	--	--	--	
A	Unrep. Employee Inc.	\$14.15	4.0%	\$1.05M	\$1.88M	\$2.93M	\$4.24M	\$33K	\$4.28M	0.0055
B	CPI (Dec. '21/20)	\$14.39	5.7%	\$2.94M	\$5.25M	\$8.19M	\$11.88M	\$53K	\$11.93M	0.0205
C	Additional 5% Incr.	\$14.72	8.2%	\$5.43M	\$9.72M	\$15.15M	\$21.97M	\$94K	\$22.07M	0.0379
D	Flat Amount	\$15.00	10.2%	\$7.47M	\$13.35M	\$20.82M	\$30.19M	\$145K	\$30.33M	0.0521

*Adjustment Factor of 45% - Compression of 27% and Employer Expenses of 18%

** Estimated Millage Rate Increase for General Fund portion only

BROWARD COUNTY LIVING WAGE ORDINANCE OCCUPATIONAL WAGE ANALYSIS REPORT

May 2022



Contents

Private Industry Analysis	3
Data Source: Bureau of Labor and Statistics (BLS)	3
BLS OEWS Available Data	4
Data Source: Economic Modeling Specialists Intl. (EMSI)	4
Emsi Burning Glass Available Data	4
Methodology	5
Comparison of BLS and EMSI Datasets	5
Comparison of Private Sector Wages to Broward County Living Wage Covered Services Positions	6
2021 Observed Median Wages (from BLS).....	6
2022 Job Posting Median Wages (from EMSI).....	7
EXHIBITS:	8
Exhibit A: List of Individual Occupations Covered by Broward County’s Living Wage Ordinance.....	9
Exhibit B: Comparison of Available Data - Median Private-Sector Wage and Broward County’s Living Wage Ordinance	11
Exhibit C: Median Wage of Private-Sector Employees – May 2021	12
Exhibit D: Median Wage of Private-Sector Job Postings – February 2022.....	13

Private Industry Analysis

At the Living Wage Workshop on March 1, 2022, the Broward County Board of County Commissioners (Board) recommended the Office of Economic and Small Business Development (OESBD) work with the Greater Fort Lauderdale Alliance (Alliance) for available industry information on private sector wages for a comparison to Broward County Living Wage Ordinance rates. OESBD requested comparative data of salaries for Living Wage covered services (positions) in the local private sector from the Alliance.

The existing Living Wage Ordinance covered services are:

- Food preparation/distribution
- Security services
- Routine maintenance services (janitorial, refuse removal, recycling collections)
- Repair refinishing services (furniture, fixtures, vehicles, machinery, equipment)
- Clerical/nonsupervisory office work
- Passenger transportation and parking services
- Printing and reproduction services
- Landscaping, lawn, or agricultural services

The Alliance noted when using the Bureau of Labor and Statistics (BLS) data, that it is 12 months old, as it takes time to compile the data. The Alliance further noted that current employment market is volatile with anecdotal reports of significant wage changes due to the competitive environment and an imbalance in supply and demand in the labor force. As a result, it is likely that the wage data is probably lagging. The Alliance had access to Emsi Burning Glass (EMSI) data, which is the most current available job data, however it is based on job postings (and not actual or observed wages).

Therefore, the two data sources were used for comparison/research purposes: wage rate statistics from the Bureau of Labor and Statistics (BLS) and job posting data from Emsi Burning Glass (EMSI).

Data Source: Bureau of Labor and Statistics (BLS)

The **Occupational Employment and Wage Statistics (OEWS)** program produces employment and wage estimates annually for nearly 800 occupations. These estimates are available for the nation, for individual states, and for metropolitan and nonmetropolitan areas.

The **May 2021 OEWS data** were released on March 31, 2022 and are available at www.bls.gov/oes/tables.htm. Broward County is included in the **Miami-Fort Lauderdale-West Palm Beach, FL Metropolitan Statistical Area (MSA)**. BLS does not release data for smaller subsets of these areas/metropolitan divisions.

This dataset is organized by occupation through **Standard Occupation Classification (SOC) codes**. Large, related groups of occupations (for example, Food Preparation and Serving Related Occupations) are defined by 2-digit codes, 00-53. Individual occupations are classified by an additional 4-digits, 1000-9999, following the 2-digit group, following a taxonomic structure.

Wages for the OEWS survey are straight-time, gross pay, exclusive of premium pay.

- Wages include base rate, cost-of-living allowances, guaranteed pay, hazardous-duty pay, incentive pay, including commissions and production bonuses, and tips.
- Wages exclude overtime pay, severance pay, shift differentials, nonproduction bonuses, employer cost for supplementary benefits, and tuition reimbursements.

Estimates of current occupational employment and wage rates are based on survey data collected over a three-year cycle.

BLS publishes other wage datasets, such as the Quarterly Census of Employment and Wages. This program publishes a quarterly count of employment and wages reported by employers covering more than 95 percent of U.S. jobs, available at the county, MSA, state and national levels by *industry*. Analysis of the wages at the industry level is not appropriate for this analysis because it is an average wage, which includes all workers, including those not impacted by Broward's Living Wage Ordinance. For example, in the administrative industry; CEOs and high-level executives are included in the industry wages, although not all employees are impacted by the Living Wage Ordinance in that industry or occupation group.

BLS is the sole source of occupational wage data. The Florida Department of Economic Opportunity (FDEO) sources data from BLS and provides a data visualization dashboard called [Florida Insight](#).

Other renowned first data sources do not provide occupational wage data: U.S. Census, Bureau of Economic Analysis, Federal Reserve Bank of the United States, Bureau of Economic and Business Research, or University of Florida.

BLS OEWS Available Data

- Employment
- Employment percent relative standard error*
- Wage percent relative standard error*
- Hourly median wage

(*) The relative standard error (RSE) is a measure of the reliability of a survey statistic. Data not meeting minimum standards of statistical reliability were removed from analysis.

Data Source: Emsi Burning Glass (EMSI)

EMSI hosts a tool named **Job Posting Analytics** (JPA) which sources data collected from job postings nationwide created by employers. This dataset is available by occupation, using the same SOC definitions used by the BLS. Data is available from JPA for a custom time period of consecutive months and can be filtered by county. A sample of data was compiled representing the Miami-Fort Lauderdale-West Palm Beach, FL MSA from March 2021 to February 2022 to determine an observed median wage of job postings for each occupation (EMSI '22 wage). This sample was chosen to represent 2022 wages despite containing some 2021 months because a longer time frame was needed to develop a sufficient sample size, as standard. The wage data is presented as a median of all postings and the number of postings. Some occupations have wide variances due to low amounts of postings for that position; these were noted and should not be given high confidence.

Emsi Burning Glass Available Data

- Hourly Median Advertised Salary
- Unique Job Postings

Methodology

The County's Living Wage Ordinance covered services align with 2-digit SOC classifications. These services/positions were bridged and grouped into the following relevant aggregated occupation groups for study:

- Cooks
- Installation, Maintenance, and Repair
- Janitors and cleaners (including First-Line Supervisors)
- Landscaping and Pest Control (including First-Line Supervisors)
- Office and Administrative Support
- Printing
- Refuse and Recyclable Material Collectors
- Security Guards
- Vehicle Operators

Occupation data was collected for 153 individual 6-digit SOC codes that align with the 2-digit aggregated classifications that align with the Living Wage Ordinance covered services' positions. Data with high Relative Standard Error (RSE), or low sample size, was removed to not skew the analysis. The Purchasing Division identified 40 individual occupations that are relevant to the County's Living Wage contracts. The 40 individual occupations were grouped into the nine (9) occupational groups above. The list of groups and occupations can be found in **Exhibit A: List of Individual Occupations Covered by County's Living Wage Ordinance**.

The Broward County Purchasing Division identified 2,314 contract employees under Living Wage Covered Services, a set which includes about 90% of all County Living Wage Covered Service contracts. The employment figures and median wages for each individual occupation were used to calculate a weighted median wage for the aggregated occupation groups, only containing the individual occupations that are relevant to the County's Living Wage contracts. This was done for both the BLS and EMSI data, separately. The results can be found in **Exhibit B: Comparison of Available Data - Median Private-Sector Wage and Broward County's Living Wage Ordinance**.

Comparison of BLS and EMSI Datasets

The BLS and EMSI datasets are not directly comparable, due to difference in the collection and calculation of their estimates. However, use of the 2022 EMSI data is predicated on the statistical confidence in its relationship with BLS data. To understand the trend in relationship between the BLS and EMSI data, job posting data for the previous year (March 2020-February 2021) was also collected from JPA and compared to the BLS 2021 data in a variability analysis. The correlation between 2021 BLS wages and 2021 EMSI job posting wages is .77, indicating a statistically strong relationship. However, the coefficient of variation between the two is large (2.0), indicating wide variation in differences. Simply put, while the BLS and EMSI data as a whole are relatively similar, when there are discrepancies, they can be significant. This is due to low sample sizes of job postings for particular individual occupations. The difference between EMSI job posting wages and BLS observed wages varies by an average of 12%, with EMSI job posting wages about 7% lower than BLS observed wages.

BLS should be considered the most reliable source of wage information, however considering the rapidly evolving job market, the more recent 2022 EMSI data can be used with relative statistical confidence, but with the caveat that the data is "best available" and is not intended to be an exhaustive representation.

Comparison of Private Sector Wages to Broward County Living Wage Covered Services Positions

Statistical similarities between the BLS and EMSI data indicate that comparing the BLS and EMSI data as a whole is fair, although significant caveats must be considered, including that the EMSI data reports job posting wages, as opposed to actual wages, the time period that the base data is collected differs, and the EMSI data contains occupations with anomalously low sample sizes, which skew the individual results in both positive and negative directions.

2021 Observed Median Wages (from BLS)

The median wage rate from BLS was compared against the County's Living Wage Rate for those positions without and with the health benefits as required by the Living Wage Ordinance as of 2021 (\$17.05 per hour and \$13.61 per hour respectively).

Without Health Benefits

In 2021, the median wage of five occupation groups (representing 89% of covered services employees) were below the County's Living Wage Rate (without health benefits, \$17.05):

- Cooks
- Janitors and cleaners, including First-Line Supervisors
- Landscaping and Pest Control including First-Line supervisors
- Security Guards
- Vehicle Operators

Meanwhile, the median wage of the remaining four occupation groups (representing 11% of covered services employees) were above the County's Living Wage Rate (without health benefits, \$17.05):

- Installation, Maintenance and Repair
- Office and Administrative Support
- Printing
- Refuse and Recyclable Material Collectors

With Health Benefits

In 2021, the median wage of two occupation groups (representing 64% of covered services employees) were below the County's Living Wage Rate (with health benefits, \$13.61):

- Janitors and Cleaners
- Vehicle Operators

Meanwhile, the median wage of the remaining seven occupation groups (representing 36% of covered services employees) were above the County's Living Wage Rate (with health benefits, \$13.61):

- Cooks
- Installation, Maintenance and Repair
- Landscaping and Pest Control
- Office and Administrative Support
- Printing
- Refuse and Recyclable Material Collectors

The results can be found in **Exhibit C: Median Wage of Private-Sector Employees – May 2021**

2022 Job Posting Median Wages (from EMSI)

The median wage rate from EMSI was compared against the County's Living Wage Rates without and with health benefits (\$17.56 per hour and \$14.02 per hour respectively).

Without Health Benefits

In 2022, the median wage of eight occupation groups (representing 93% of covered services employees) were below the County's Living Wage Rate (without health benefits, \$17.56 per hour) and are on average 16% lower than the County's Living Wage Rate (without benefits):

- Cooks
- Janitors and cleaners, including First-Line Supervisors
- Landscaping and Pest Control including First-Line supervisors
- Office and Administrative Support
- Printing
- Refuse and Recyclable Material Collectors
- Security Guards
- Vehicle Operators

Meanwhile, the median wage of the remaining one occupation group (Installation, Maintenance and Repair), representing 7% of covered services employees, was above the County's Living Wage Rate (without health benefits) and has median wages 10% higher than the 2022 Living Wage rate (without health benefits).

With Health Benefits

In 2022, the median wage of two occupation groups (Janitors & Cleaners and Security Guards), representing approximately 68% of County covered service employees are below Broward County's Living Wage Ordinance (with health benefits; \$14.02) and have median wages 17% lower than the 2022 Living Wage rate (with health benefits).

Meanwhile, the median wage of the remaining seven occupation groups (representing 32%) was above the County's Living Wage Rate (with health benefits) and are on average 3% higher than the Living Wage Rate (with health benefits):

- Cooks
- Installation, Maintenance, and Repair
- Janitors and cleaners
- Landscaping and Pest Control
- Office and Administrative Support
- Printing
- Refuse and Recyclable Material Collectors
- Security Guards
- Vehicle Operators

The results can be found in **Exhibit D: Median Wage of Private-Sector Job Postings – February 2022.**

It is noted that the Living Wage contracts for the Installation, Maintenance and Repair occupation group are generally covered by Collective Bargaining Agreements based on the trade-specific industry (ex. HVAC, elevators/escalators technicians, etc.) which are higher paying.

EXHIBITS:

Exhibit A: List of Individual Occupations Covered by Broward County’s Living Wage Ordinance 9
Exhibit B: Comparison of Available Data - Median Private-Sector Wage and Broward County’s
Living Wage Ordinance..... 11
Exhibit C: Median Wage of Private-Sector Employees – May 2021..... 12
Exhibit D: Median Wage of Private-Sector Job Postings – February 2022 13

Exhibit A: List of Individual Occupations Covered by Broward County’s Living Wage Ordinance

Occupation Group	Included Individual Occupations
Cooks	-Cooks, Institution and Cafeteria
Installation, Maintenance, and Repair	<ul style="list-style-type: none"> -Bus and Truck Mechanics and Diesel Engine Specialists -Automotive Body and Related Repairers -Security and Fire Alarm Systems Installers -Industrial Machinery Mechanics -Helpers--Installation, Maintenance, and Repair Workers -Mobile Heavy Equipment Mechanics, Except Engines -Outdoor Power Equipment and Other Small Engine Mechanics -Control and Valve Installers and Repairers, Except Mechanical Door -Audiovisual Equipment Installers and Repairers -Mechanical Door Repairers -Electric Motor, Power Tool, and Related Repairers -Maintenance Workers, Machinery -Electrical and Electronics Repairers, Powerhouse, Substation, and Relay -Radio, Cellular, and Tower Equipment Installers and Repairers -Heating, Air Conditioning, and Refrigeration Mechanics and Installers -Maintenance and Repair Workers, General
Janitors and cleaners, including First-Line Supervisors	<ul style="list-style-type: none"> -First-Line Supervisors of Housekeeping and Janitorial Workers -Janitors and Cleaners, Except Maids and Housekeeping Cleaners

Occupation Group	Included Individual Occupations
Landscaping and Pest Control including First-Line supervisors	<ul style="list-style-type: none"> -First-Line Supervisors of Landscaping -Pest Control Workers -Landscaping and Groundskeeping Workers -Pesticide Handlers, Sprayers, and Applicators, Vegetation
Office and Administrative Support	<ul style="list-style-type: none"> -Office Clerks, General -Secretaries and Administrative Assistants, Except Legal, Medical, and Executive -Bookkeeping, Accounting, and Auditing Clerks -Receptionists and Information Clerks -Billing and Posting Clerks -Data Entry Keyers -Order Clerks -File Clerks -Office and Administrative Support Workers, All Other -Couriers and Messengers -Mail Clerks and Mail Machine Operators, Except Postal Service -Meter Readers, Utilities -Word Processors and Typists
Printing	<ul style="list-style-type: none"> -Print Binding and Finishing Workers
Refuse and Recyclable Material Collectors	<ul style="list-style-type: none"> -Refuse and Recyclable Material Collectors
Security Guards	<ul style="list-style-type: none"> -Security Guards
Vehicle Operators	<ul style="list-style-type: none"> -Motor Vehicle Operators, All Other

Exhibit B: Comparison of Available Data - Median Private-Sector Wage and Broward County's Living Wage Ordinance

Occupation Group	2021 Median Wage - BLS	Δ 2021 Living Wage Ordinance (\$17.05)	2021 Median Wage - EMSI	Δ 2021 Living Wage Ordinance (\$17.05)	2022 Median Wage - EMSI	Δ 2022 Living Wage Ordinance (\$17.56)	Δ 2021 BLS - 2022 EMSI
Cooks	\$13.85	-\$3.20	\$8.95	-\$8.10	\$15.84	-\$1.72	\$1.99
Installation, Maintenance, and Repair	\$19.97	\$2.92	\$18.23	\$1.18	\$19.39	\$1.83	-\$0.58
Janitors and cleaners, including First-Line Supervisors	\$12.36	-\$4.69	\$11.94	-\$5.11	\$13.08	-\$4.48	\$0.72
Landscaping and Pest Control including First-Line supervisors	\$15.76	-\$1.29	\$15.07	-\$1.98	\$15.63	-\$1.93	-\$0.13
Office and Administrative Support	\$17.39	\$0.34	\$15.34	-\$1.71	\$16.32	-\$1.24	-\$1.06
Printing	\$17.73	\$0.68	\$17.05	\$0.00	\$17.54	-\$0.02	-\$0.19
Refuse and Recyclable Material Collectors*	\$22.97	\$5.92	\$14.65	-\$2.40	\$14.95	-\$2.61	-\$8.02
Security Guards	\$13.90	-\$3.15	\$12.25	-\$4.80	\$13.97	-\$3.59	\$0.07
Vehicle Operators*	\$11.56	-\$5.49	\$12.98	-\$4.07	\$14.95	-\$2.61	\$3.39
*Low confidence in 2022 EMSI due to low sample size							

The following charts demonstrate the median wage of each occupation group on the y-axis, and the widths of the individual bars represent the share of County contracts with that occupation group. For example, the occupation group. Janitors and Cleaners, is the largest group under county living wage contracts, while Printing is the smallest. The horizontal lines represent the County living wage with and without health benefits.

Exhibit C: Median Wage of Private-Sector Employees – May 2021

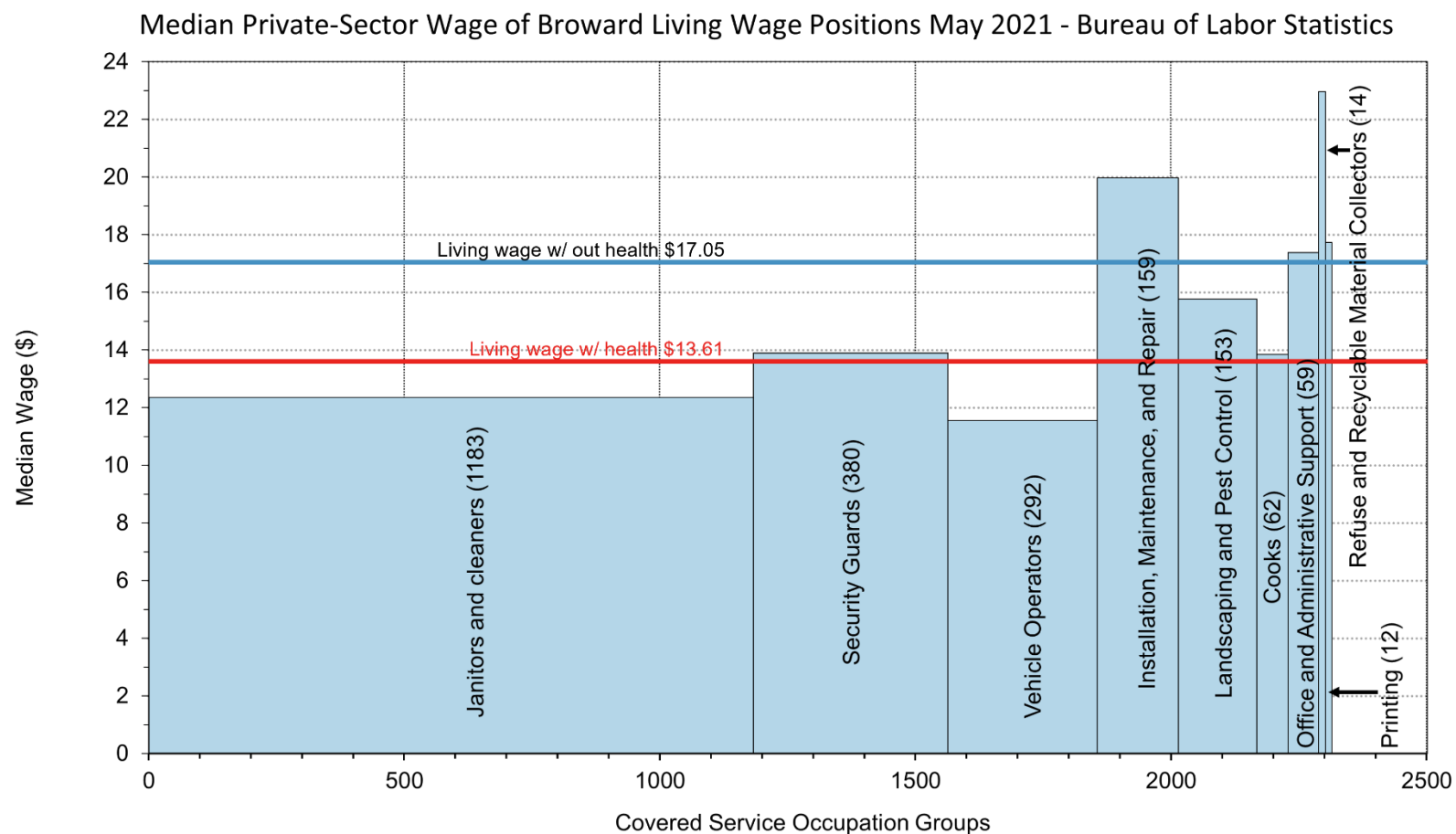
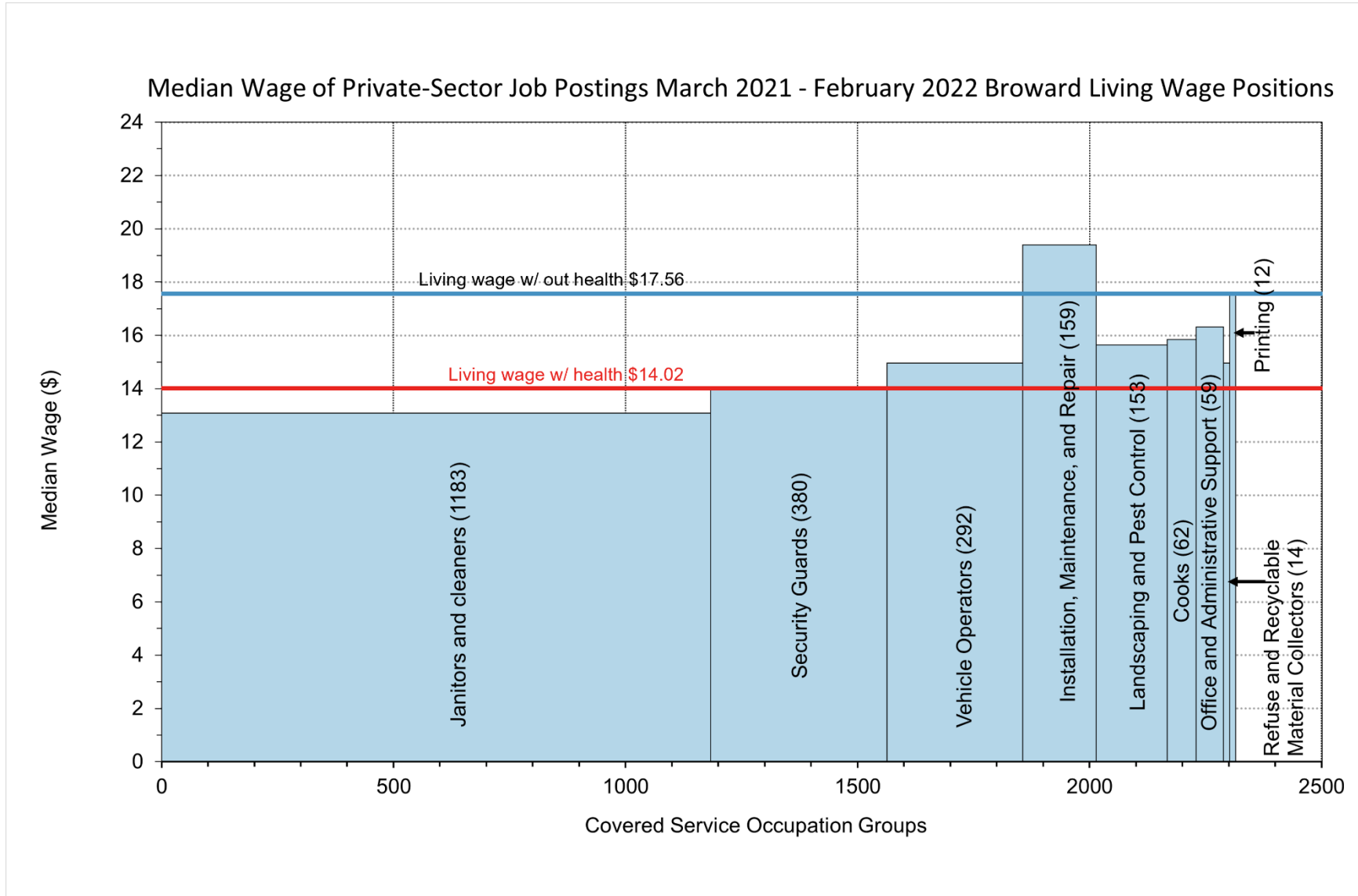


Exhibit D: Median Wage of Private-Sector Job Postings – February 2022





2022 Broward County Affordable Housing Needs Assessment

Dr. Ned Murray, AICP

The Prosperity Partnership
Housing Affordability Summit

May 5, 2022



Critical Findings

1

The scope and scale of Broward County's affordable housing needs are substantial and impact a broad spectrum of economic and social issues

2

Renter households are the most vulnerable due to low household incomes, low wage employment, limited choice and accessibility, and excessive cost-burden levels

Critical Findings

3

Most (92 percent) Broward County residents can't afford the current median sale price (\$545,000) of a single-family home. The median single-family home price-to-median household income ratio now stands at 8.9:1

4

Broward County's economic competitiveness, resilience and quality of life are at risk – impacts on Leisure & Hospitality, Healthcare, and Retail sectors reliant on service sector workers along with major institutions – hospitals, public schools, colleges, and universities

Demographic and Economic Factors

Broward County Age Demographics, 2017 and 2020

	Broward County		
Age	2017	2020	Difference
Total Population	1,761,993	1,942,273	10.2%
Under 5 years	110,377	112,405	1.8%
5 to 17 years	296,263	298,582	0.8%
18 to 34 years	411,420	414,881	0.8%
35 to 54 years	534,050	532,695	0.3%
55 and over	538,306	583,710	8.4%
18 and over	1,483,776	1,531,286	3.2%
65 and over	294,961	323,755	9.8%

Source: U.S. Census, 2020 *American Community Survey*

Broward County Labor Force Participation 2017 - 2020

	2017		2020	
Total Population	1,890,416		1,942,273	
Poverty Rate	14.0%		12.7%	
Labor Force Participation				
Total Population 16+	1,531,882		1,578,031	
Population in Labor Force	1,008,709	65.8%	1,037,402	65.7%
Employed Population	930,561	60.7%	974,826	61.8%

Source: U.S. Census, 2020 *American Community Survey*

Broward County Race and Ethnicity 2017 - 2020

Population	2017	%	2020	%	% Change
Total	1,890,416		1,942,273		2.7%
White alone, Not Hispanic or Latino	721,241	38.2%	689,773	35.5%	4.4%
Black or African American alone	536,589	28.4%	555,741	28.6%	3.6%
Hispanic or Latino	535,987	28.4%	586,236	30.2%	9.4%
Asian alone	67,822	3.6%	70,561	3.6%	4.0%
Native Hawaiian and Other Pacific Islander alone	1,102	0.1%	1,241	0.1%	12.6%
Some other race alone	57,417	3.0%	67,771	3.5%	18.0%
Two or more races	57,432	3.0%	137,964	7.1%	140.2%

Source: U.S. Census, 2020 *American Community Survey*

Broward County Highest Poverty Rates 2020

Municipality	Poverty Rate
Pembroke Park	22.5%
Lauderdale Lakes	21.6%
Hallandale Beach	20.7%
Lauderhill	19.1%
North Lauderdale	18.7%
Pompano Beach	17.3%
West Park	17.1%
Deerfield Beach	16.8%
Dania Beach	16.3%
Fort Lauderdale	15.8%

Source: U.S. Census, 2020 *American Community Survey*

Housing Supply

Broward County Housing Units by Major Municipality

	2017		2020	
Municipality	Housing Units	% of County Total	Housing Units	% of County Total
Fort Lauderdale	95,843	11.7%	95,057	11.5%
Hollywood	69,754	8.5%	69,538	8.4%
Pembroke Pines	63,757	7.8%	65,001	7.9%
Pompano Beach	54,482	6.7%	55,421	6.7%
Coral Springs	44,493	5.4%	45,344	5.5%
Miramar	43,752	5.3%	44,929	5.4%
Deerfield Beach	41,585	5.1%	41,638	5.0%
Davie	39,149	4.8%	38,951	4.7%
Plantation	37,675	4.6%	38,006	4.6%
Sunrise	36,984	4.5%	38,440	4.7%
Tamarac	31,141	3.8%	30,979	3.7%
Hallandale Beach	28,406	3.5%	27,314	3.3%
Broward County	818,382	100.0%	826,382	100.0%

Source: U.S. Census, 2020 ACS

Broward County Vacancy Status Characteristics, 2012-2020

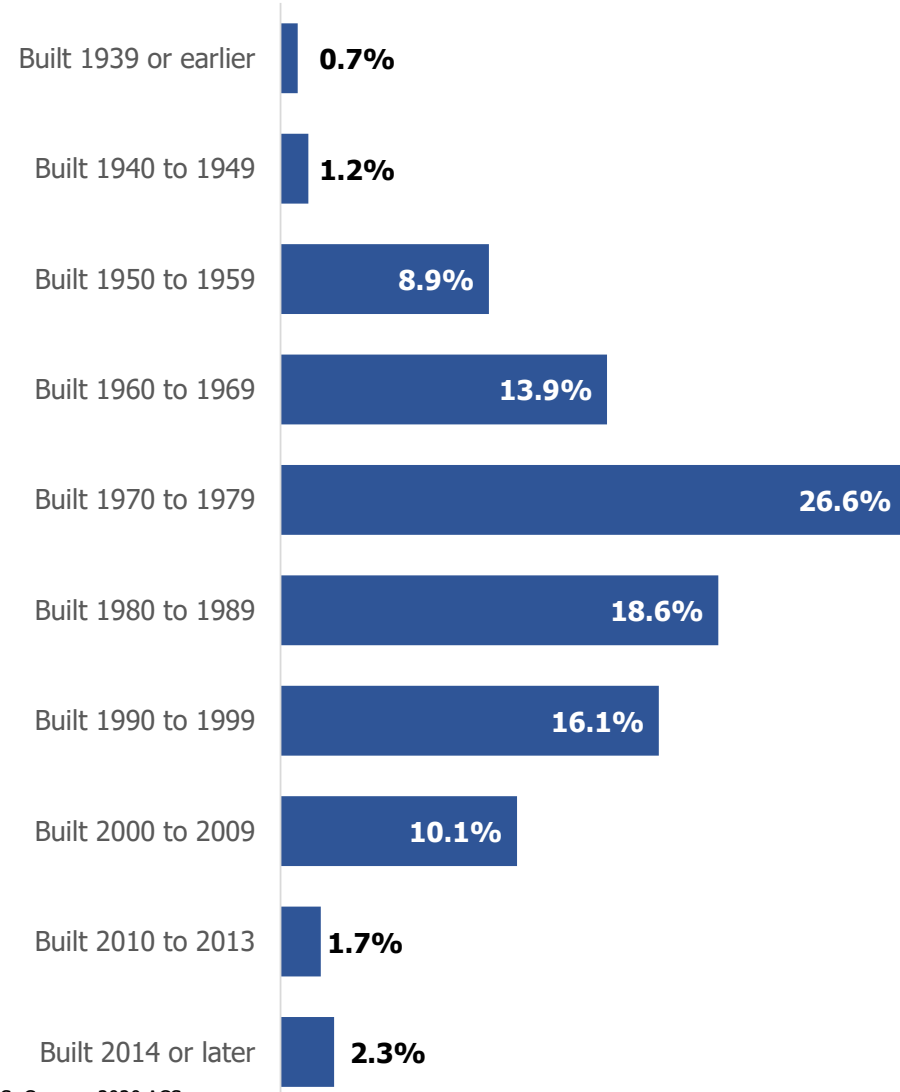
	2012	2015	2020
Total Vacant Units	144,307	142,554	121,440
For Rent	25,698	20,719	19,408
Vacancy Status	2012	2017	2020
Rented or Sold, Not Occupied	9,583	13,380	8,997
For Seasonal, Recreational, or Occasional Use	68,214	80,394	68,654
All Other Vacant	26,678	18,962	16,486

Source: U.S. Census, 2020 ACS



Age of Structures

Total Housing Units	826,382	
Year Built		
Built 2014 or later	18,878	2.3%
Built 2010 to 2013	14,139	1.7%
Built 2000 to 2009	83,056	10.1%
Built 1990 to 1999	132,944	16.1%
Built 1980 to 1989	153,813	18.6%
Built 1970 to 1979	219,851	26.6%
Built 1960 to 1969	114,712	13.9%
Built 1950 to 1959	73,195	8.9%
Built 1940 to 1949	9,738	1.2%
Built 1939 or earlier	6,056	0.7%



Source: U.S. Census, 2020 ACS

Broward County Sales Activity

March 2022

	Mar-21	Mar-22	% Change
Single-Family Homes	\$445,000	\$545,000	22.5%
Closed Sales	1,870	1,541	17.6%
Cash Sales	410	448	9.5%
Townhomes/Condos	\$210,000	\$238,500	13.6%
Closed Sales	2,151	2,162	0.5%
Cash Sales	1,086	1,330	22.4%

Source: MIAMI Association of REALTORS, March 2022 Sales Report

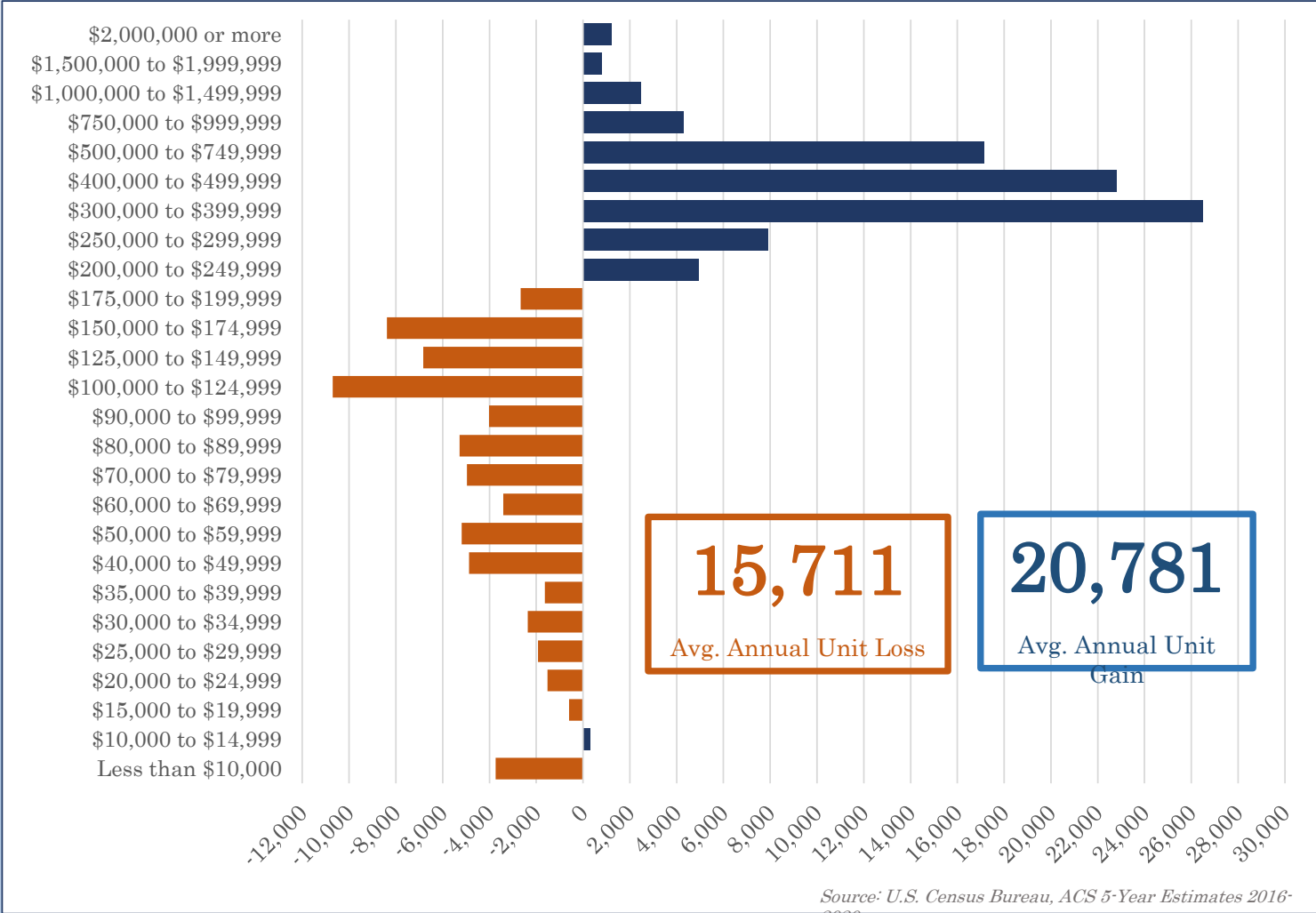
Broward County Single-Family Median Sales Price by Major Municipality: Q1/2022

Municipality	Median Sale Price Q1/2022
Broward County	\$520,000
Fort Lauderdale	\$720,000
Hollywood	\$489,000
Pembroke Pines	\$535,000
Pompano Beach	\$390,000
Coral Springs	\$601,750
Miramar	\$532,750
Deerfield Beach	\$420,000
Davie	\$630,000
Plantation	\$577,625
Margate	\$415,000
Sunrise	\$435,000
Tamarac	\$317,500
Hallandale Beach	\$305,000

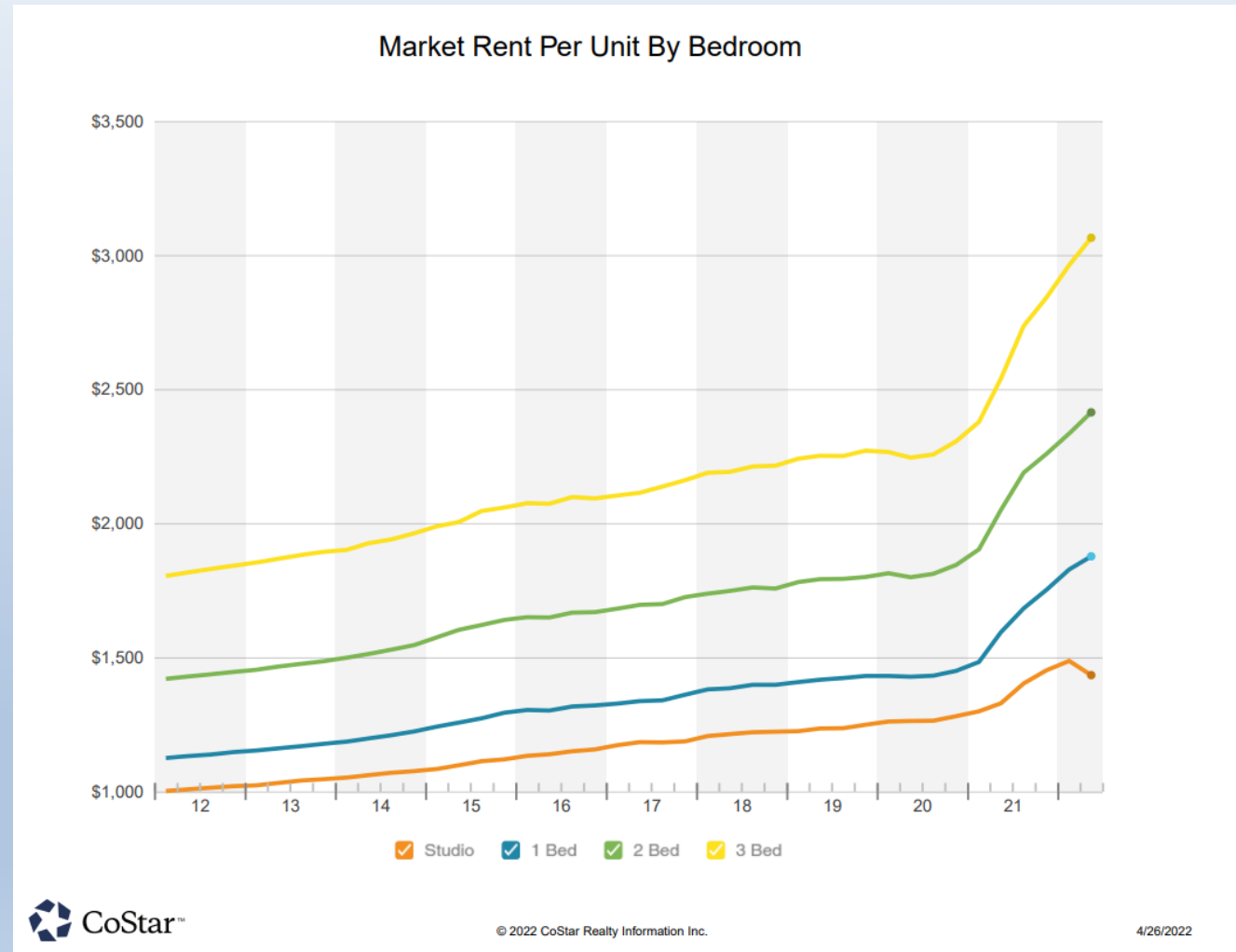
Source: MIAMI Association of Realtors, Local Residential Market Metrics 2022

Broward County Owner-Occupied Units Supply: Change by Value 2016-2020

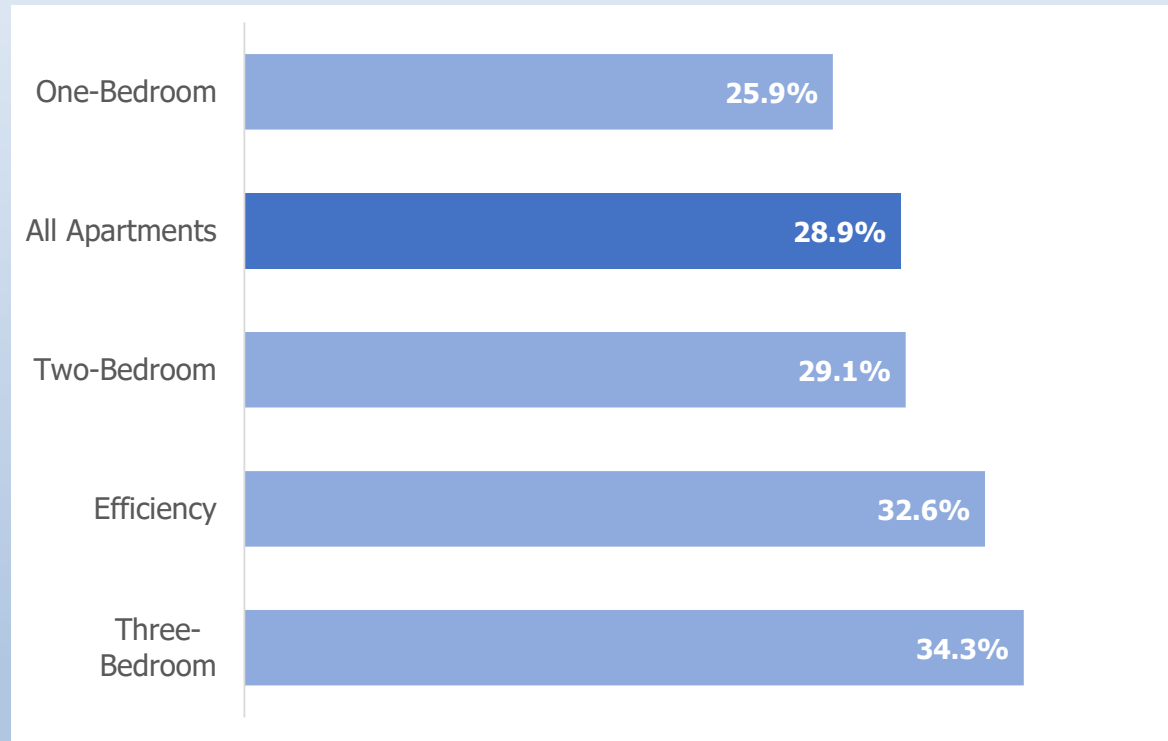
Housing Units by Value	Below \$250,000		\$250,000+	
	Total # of Units	Unit Gain/Loss	Total # of Units	Unit Gain/Loss
2016	253,704		168,650	
2017	234,655	19,049	186,125	17,475
2018	218,028	16,627	205,288	19,163
2019	200,895	17,133	227,787	22,499
2020	190,861	10,034	251,772	23,985
Annual Average Unit Change	15,711		20,781	



Broward County Market Rent by Bedrooms 2012 - 2022



Broward County Change in Average Rent by Bedroom 2020 - 2021



Source: Reinhold P. Wolff Economic Research, Inc. 4Q21

Broward County Average Rents by Submarkets

1Q/2022

Submarket	1 BR	2 BR	3 BR
Hollywood/Hallandale	\$1,849	\$2,520	\$3,589
Pembroke Pines/Miramar	\$2,004	\$2,645	\$3,179
Davie/Cooper City	\$2,248	\$2,612	\$3,254
Plantation	\$2,116	\$2,648	\$3,343
Fort Lauderdale	\$2,547	\$3,374	\$4,801
Lauderhill/Lauderdale Lakes/Sunrise	\$1,779	\$2,067	\$2,429
Pompano Beach	\$1,997	\$2,500	\$3,690
North Lauderdale/Tamarac	\$1,893	\$2,211	\$2,495
North Pompano/Deerfield Beach	\$1,972	\$2,194	\$2,891
Coral Springs	\$2,195	\$2,591	\$3,092

Source: Reinhold P. Wolff Economic Research, Inc. 4Q21

Broward County Rental Vacancy Rates by Submarket

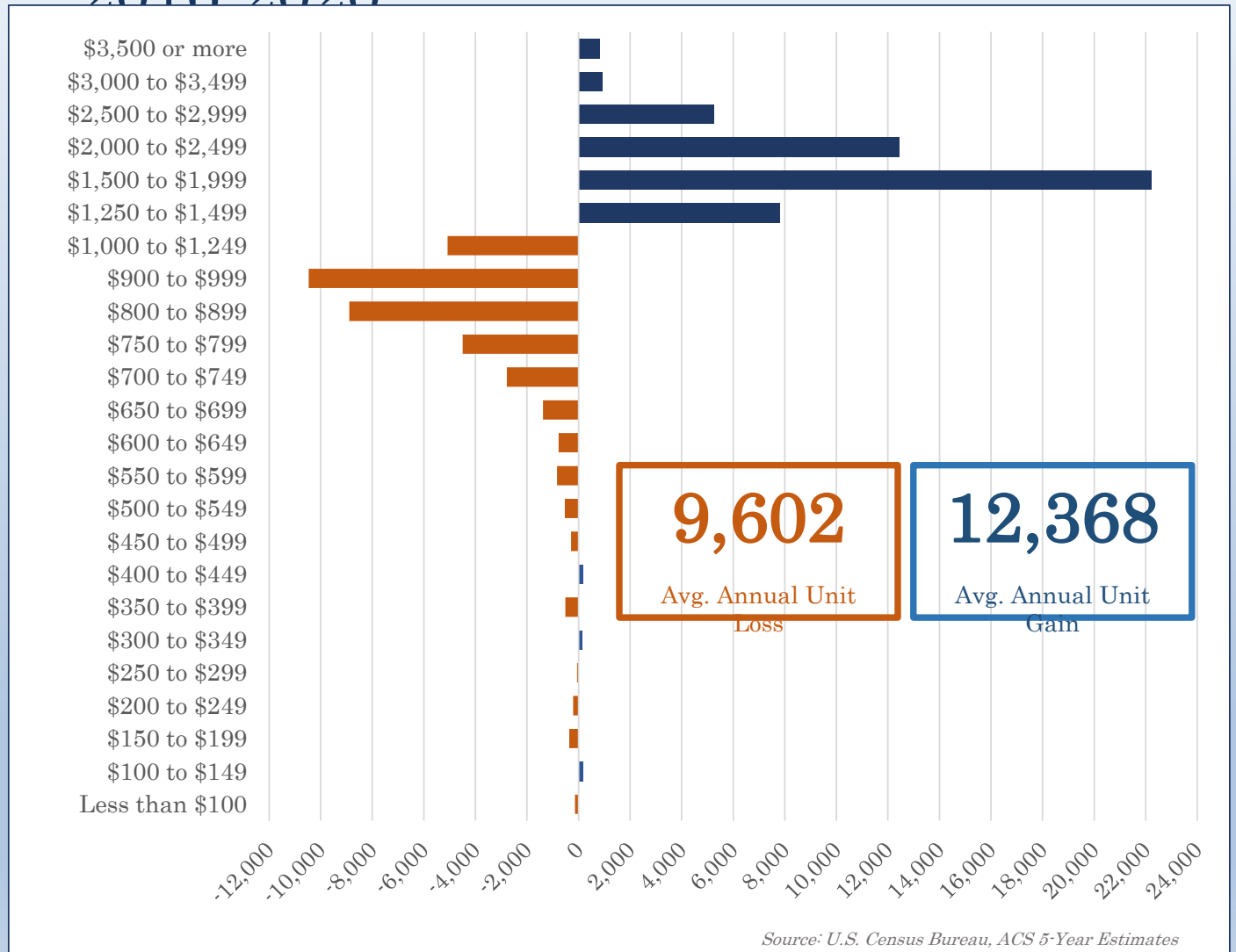
	# Units Surveyed	# Units Vacant	Percent Vacant
Hollywood/Hallandale	3,762	42	1.1%
Pembroke Pines/Miramar	1,171	238	2.0%
Davie/Cooper City/Weston	6,172	96	1.6%
Plantation	7,419	176	2.4%
Fort Lauderdale	9,596	133	1.4%
Lauderhill/Lauderdale Lakes/Sunrise	6,249	39	0.6%
Pompano Beach	3,197	49	1.5%
North Lauderdale/Tamarac	4,472	28	0.6%
North Pompano/Deerfield Beach	5,715	15	0.3%
Coral Springs/Coconut Creek	11,321	183	1.6%
Total Broward	69,674	999	1.4%

Source: Reinhold P. Wolff Economic Research, Inc. 4Q21

Broward County Renter-Occupied Units Supply: Change by Value

2016-2020

Housing Units by Value	Below \$1,250		\$1,250+	
	Total # of Units	Unit Gain/Loss	Total # of Units	Unit Gain/Loss
2016	126,460		115,742	
2017	119,785	6,675	127,177	11,435
2018	109,917	9,868	141,233	14,056
2019	98,664	11,253	155,843	14,610
2020	90,212	8,452	165,215	9,372
Annual Average Unit Change		9,062		12,368



Source: U.S. Census Bureau, ACS 5-Year Estimates

Affordable Housing Demand

Broward County Cost-Burdened Household by Tenure 2020

Households	30%+ on Housing Costs		50%+ on Housing Costs	
	Count	Percent	Count	Percent
Overall Households	301,860	44.0%	147,362	21.5%
Owners	147,140	33.7%	67,241	15.4%
With Mortgage	106,469	40.2%	46,053	17.4%
Without Mortgage	40,671	23.7%	21,188	12.3%
Renters	154,720	61.9%	80,121	32.0%

Source: U.S. Census, 2020 *American Community Survey*

Broward Owner Housing Affordability Analysis: 2020

Owner Households	Broward County Affordability Calculations			
Median Household Income 2020 (MHI)	\$74,405			
Median Single-Family Sale Price, Q1 2022	\$520,000			
Median Townhouse/Condo Sale Price, Q1 2022	\$239,700			
Owner Household Income Categories	Income	Affordable Home Purchase Price	Single-Family Home Gap/Surplus	Condominium Gap/Surplus
Low-Income (51-80% of MHI)	\$59,524	\$178,572	\$341,428	\$61,128
Moderate-Income (81-100% of MHI)	\$60,922	\$182,766	\$337,234	\$56,934
Middle-Income (101-120% of MHI)	\$89,286	\$267,858	\$252,142	\$28,158
Upper-Income (121% or greater of MHI)	\$90,030	\$270,090	\$249,910	\$30,390
Median Income	\$74,405	\$223,215	\$296,785	\$16,485

Source: U.S. Census, 2020 *American Community Survey*, MIAMI Association of REALTORS, March 2022 Sales Report; calculations by Jorge M. Perez FIU

Broward County Single-Family Home Affordability Analysis by Major Municipality 2020

Municipality	Median HH Income	Affordable Price @ Median	Median Sale Price Q1 2022	Affordability Gap @ Median
Fort Lauderdale	\$64,313	\$192,939	\$720,000	\$527,061
Hollywood	\$54,317	\$162,951	\$489,000	\$326,049
Pembroke Pines	\$40,024	\$120,072	\$305,000	\$184,928
Pompano Beach	\$52,565	\$157,695	\$390,000	\$232,305
Coral Springs	\$77,488	\$232,464	\$601,750	\$369,286
Miramar	\$70,477	\$211,431	\$532,750	\$321,319
Deerfield Beach	\$32,297	\$96,891	\$420,000	\$323,109
Davie	\$74,523	\$223,569	\$630,000	\$406,431
Plantation	\$75,780	\$227,340	\$577,625	\$350,285
Sunrise	\$54,701	\$164,103	\$435,000	\$270,897
Tamarac	\$51,799	\$155,397	\$317,500	\$162,103
Hallandale Beach	\$40,237	\$120,711	\$412,500	\$291,789

Source: U.S. Census, 2020 ACS; MIAMI Association of Realtors Market Statistics 1Q22, calculations by Jorge M. Perez FIU Metropolitan Center

Broward County Renter Affordability Analysis 2020

Renters	Renter Household Calculations		
Median Household Income 2020 (MHI)	\$45,936		
Average Apartment Rent	\$2,503		
Household Income Categories	Income	Affordable Rent	Gap/Surplus
Extremely Low-Income (0-30% of MHI)	\$13,781	\$345	\$2,158
Very Low-Income (31-50% of MHI)	\$22,968	\$574	\$1,929
Low-Income (51-80% of MHI)	\$36,749	\$919	\$1,584
Moderate-Income (81-100% of MHI)	\$45,936	\$1,148	\$1,355
Middle-Income (101-120% of MHI)	\$55,123	\$1,378	\$1,125
Upper-Income (121% or greater of MHI)	\$55,583	\$1,390	\$1,113

Source: U.S. Census, 2020 American Community Survey; ACS; Reinhold P. Wolff Research Associates, Inc., 4Q21; calculations by Jorge M. Perez FIU Metropolitan Center

Concluding Comment

Address the Challenge - The scope and scale of the affordable housing crisis requires a commensurate planning and policy response and the marshalling of public and private resources and support at all levels of community.

Invest in Innovation - planning and policy concepts that expand local funding, create greater infill and reuse opportunities, further incentivize land use and zoning, and identify the most effective roles for major employers including large business establishments and institutions.



Thank you!

Dr. Ned Murray, AICP

