

Winter Park Visioning

A Technical Assistance Panel
for the City of Winter Park, Florida



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Table of Contents

Introduction.....5
Project Objectives6
Methodology.....7
Common Themes.....8
Recommendations.....10
Recommended Vision Scope of Work13

Introduction

Winter Park has worked for years to maintain its reputation as an upscale community with million-dollar homes, a pristine chain of lakes, a thriving downtown shopping district, and a prestigious private college. But it's so much more than that.

The city represents a variety of neighborhoods, each with its own personality. These neighborhoods share many things in common beside ZIP codes, schools and roads. But there is one overriding element that binds them: a sense of pride in their community.

As Winter Park looks toward the next 20 years, its leaders want to craft a vision that all parts of the city can share — a vision that takes into account the rich diversity of the community and is inclusive of each area's residents and businesses.

To start that initiative, the city's Planning and Community Development division called on the nonprofit Urban Land Institute to conduct a Technical Assistance Panel (TAP). The panel's task was to determine how the city should undertake the initiative of creating a new vision for Winter Park. Who should be involved? How should the process be handled? How should the initiative and its results be communicated? Who should oversee the process?

The results of the TAP's research are the subject of this report.

What Are Technical Assistance Panels (TAPs)?

Since 1947, the Urban Land Institute's (ULI) Advisory Services Program has been assisting communities by bringing together week-long panels of seasoned real estate, planning, landscape architecture, financing, marketing, and development experts to provide unbiased pragmatic advice on complex land use and development issues. Several years ago, the Florida District Councils began providing panel services of one or two days to address specific local government issues in areas such as housing, parking, redevelopment, and future land use development.

How Do TAPs Work?

A sponsor requests the services of a TAP with regard to a specific issue that can be addressed by a panel of experts in one or two days. The District Council assists the sponsor in refining the scope of the assignment and convenes a panel to address those specific issues. The sponsor works within ULI guidelines to provide background information to ULI panelists prior to the panel's convening. When convened, members of the TAP view the subject site, hear from public and private stakeholders, and then deliberate on the assigned issues. At the conclusion of its work, the panel presents an oral report to stakeholders; that is followed by a written report within approximately six weeks. To ensure objectivity, panel members cannot be involved in matters pending before the sponsor, be working for the sponsor, or solicit work from the sponsor during the panel's assignment period. Panel members volunteer their services to the project.

Who Is ULI?

ULI was founded in 1936 as a non-profit institute to facilitate the open exchange of ideas and information among local, national, and international real estate industry leaders and policy makers dedicated to creating better places. Today it has more than 32,000 members worldwide. The ULI does not lobby or act as an advocate for any single industry. It is committed to providing leadership in the responsible use of land and creating and sustaining thriving communities.

Project Objectives

In September 2013, consulting firm WRT reported to city leaders that Winter Park's absence of a shared consensus on community vision is holding the city back from realizing its full potential. The firm issued a report, *City of Winter Park: Analysis of Potential Policy and Regulatory Impediments to Economic Development*, which made the following observations:

The 2009 Comprehensive Plan does not include a "community vision," which was encouraged in language introduced into Chapter 163 in 2005. Most of the interviewed stakeholders concede that no community vision exists, although several partial or focused visioning efforts have been conducted in the past. The results have been mixed for various reasons.

Some of WRT's interviewees doubted the likelihood of ever arriving at a consensus vision, due to perceptions that differences of opinion in the community run too deep. WRT does not share this worry. However, we view the lack of a collective community vision as one of the fundamental causes of conflict over the comprehensive plan.

The consulting firm expressed the importance of a vision statement, which it said would set a tone and provide a "destination" for the comprehensive plan that every citizen can understand. The report further stated:

WRT recommends that the city consider engaging in a community-wide visioning process in the next couple of years, prior to the deadline to decide on the next full comprehensive plan update. We believe it is important having a community vision statement as the cornerstone of a comprehensive plan because the vision represents the consensus of its citizens. Consensus does not imply unanimity, but a process where everyone's input is carefully considered and the outcome best meets the needs of the community as a whole.

Not everyone needs to agree with every aspect of a vision statement, but if the consensus building process is conducted effectively, individual interests, concerns and aspirations are tested against the best interest of the community. As people work through issues, they have their own needs reflected back to them against the context of the community needs, which encourages them to consider interests beyond their own. For this reason, a consensus vision requires less enforcement (less regulation).

Against the backdrop of that 2013 report, the ULI TAP asked city commissioners pointed questions about what it will take to build a consensus vision and how they would go about doing it. The commissioners serve at-large and represent a constituency with diverse interests, and the leaders themselves are diverse in age, professions and political experience. Although they were interviewed separately, the commissioners were in agreement on several objectives.

City leaders made it clear they did not expect the TAP to handle the visioning process during the one-day panel meeting. Instead, the city asked for strategic advice from the panel on how to proceed. The panel's report is intended to aid the city in creating a project scope for hiring a consulting firm that will oversee the visioning process.

Methodology

The Technical Assistance Panel met Sept. 23, 2014, for a one-day session in Winter Park to explore the current situation and make recommendations on how the city should proceed. Panelists were chosen for their extensive experience with similar projects and their knowledge of how to build community consensus. They were not connected with Winter Park or the Orlando region and were not familiar with the city's history or the discussion over recent developments.

The panelists were:

Bob Rhodes (TAP Chair) – an attorney and real estate development consultant in Jacksonville who formerly served as Executive Vice President of the St. Joe Company and as St. Joe's General Counsel. He held similar positions with Arvida Corporation and Disney Development Company. Rhodes administered Florida's growth management program and served as counsel to the Speaker of the Florida House of Representatives and as Assistant Director of the Washington, D.C., office of the Council of State Governments. He chaired state commissions that developed and subsequently recommended revisions to the state's growth management program. He also chaired the Tallahassee-Leon County Planning Commission, Jacksonville's Downtown Development Authority and Economic Development Commission, the Trust for Public Land's Northeast Florida Chapter, the Northeast Florida Regional Community Institute and the Florida Bar Administrative Law Section and Environmental Land Use Law Section.

Robert Karn, AIA, LEED AP – a Design Principal for Consilium Urban Design and Architecture, based in the Boston area. He has worked on numerous urban design plans in the United States, the Middle and Far East and Europe, including urban design, campus and civic planning for new towns in India, university campuses on the Eastern Seaboard, and transit-oriented development in the Northeast. Prior to locating in Boston, Karn practiced for 10 years in Germany collaborating on the reconstruction of East Germany after the destruction of the Berlin Wall. He formerly served as the Director of Design and Planning for the Denver Partnership, a 501c3 responsible for the development of the Downtown Area Plan 2000, which included creation of a long-term transit and transportation strategy, a comprehensive open space system, and extensive land use modification to stimulate downtown housing. Karn is also a founding member and faculty at the Center for Sustainable Urbanism.

Jeff Pearlman – immediate past Mayor of Delray Beach, where he served on the City Commission from 2000-07, including four years as Mayor, and was a finalist for Florida Mayor of the Year and World Mayor of the Year. Under his leadership, Delray Beach gained national recognition for its renaissance. Among his accomplishments: a Downtown Master Plan, creation of the cultural plan, passage of the 2005 Parks Bond, and a vision for the Congress Avenue corporate/innovation corridor. He championed walkability, design, smart growth, downtown housing, and mixed-used development, helping Delray Beach become a model for other small cities. Pearlman currently is CEO of Community Ventures and Executive Vice President of Business Development for CDS International Holdings, a private equity firm with a wide range of real estate, consumer and philanthropic interests. He has served on dozens of corporate and nonprofit boards.

The TAP interviewed each of Winter Park's five elected city leaders individually, in compliance with Florida's Sunshine Laws that call for discussion of any city business by two or more officials of the same government body to be open to the public. Those city leaders were:

- Mayor Ken Bradley
- Vice Mayor Steven Leary
- Commissioner Carolyn Cooper
- Commissioner Tom McMacken
- Commissioner Sarah Sprinkel

Each elected official described a scenario and offered opinions about how to build consensus among Winter Park's varied constituents. The TAP observed that there was much more consensus among the commissioners than even the leaders themselves realized. The commissioners' ideas followed several main themes, and the TAP captured those in this report.

After the individual interviews, the panel considered its recommendations. Later that day, the city held a public meeting where the TAP could present its findings to the entire commission as well as residents and local business leaders. About 60 people were in attendance.

Common Themes

Each of the five commissioners spoke with the panel about specific questions and concerns from residents and business owners who have very definite opinions about the city's future. Panelists listened intently, asked questions, and then collaborated to compile an outline of common themes they had heard from the city's leaders. The TAP shared those themes with the audience during the public meeting and served as significant steppingstones toward development of the TAP's final recommendations.

Among the themes:

Gathering Input on the Vision

- **Favor a value-based visioning process vs. specific issues** – When seeking input from the community, the visioning process should ask people to define their vision, rather than seek their opinions on certain points such as housing density, building heights, zoning or other specific issues.
- **Favor maximum inclusion** – The process should include as many residents and business owners as it can, rather than choosing a sampling of representatives.
- **Offer a variety of ways to participate** – Different people will respond to different methods of outreach, leaders told the TAP. Some will answer only a mailed survey, while others will respond only if the survey is online. Some will engage through social media, and others will not connect to the effort unless someone knocks on their doors and invites them to a neighborhood cookout.
- **Educate the public about the visioning process** – At the beginning, the education will be about the process itself and how and why they should participate. It will evolve into educating them about how the shared vision will affect their lives and how the city will use it to guide future decisions. The process should help define for residents what a vision is and what it is not. For instance, a vision is not a comprehensive growth plan.

Defining the Vision

- **Identify problems to be solved** – The vision should address what's causing today's concerns as well as tomorrow's opportunities. In the visioning process, it will help to give examples of how the vision could be used in the future to solve issues the city will face.
- **Separate vision** – Creating the vision separately from other initiatives, such as the comprehensive plan, will give the city more flexibility to apply it to future decisions across the board instead of just when dealing with development, growth, zoning or other specific types of issues.

- **Actionable steps/direction desired** – The consulting firm hired to handle the visioning process must outline specific actionable steps the city should take and what each of those steps is expected to accomplish.
- **Solid results from dollars spent** – The visioning process should produce results that show a solid return on investment. This process will be performed with taxpayer dollars, and the city's residents and business owners will want to know that those were spent wisely.

Language / Messaging

- **Strategic direction** – The plan for conducting the visioning process should address why the city needs a collective vision so it can be explained to community groups.
- **Avoid bias** – In the visioning process, no one group, neighborhood or population segment is more important than any other. The process and the messaging cannot show bias for the residents in mansions over those in modest homes, or for longtime residents over new neighbors, or for businesses on Park Avenue over those on U.S. 17-92.
- **Avoid terms that are too “technical”** – The process must address participants in layman's terms to fully engage them. If it's too technical, it won't resonate and the results will be skewed toward only those who understand city planning jargon.
- **Drill down by neighborhoods** – To reach the maximum number of people for their input, the visioning process should actively solicit input from each neighborhood and address its specific needs. In some parts of the city, neighbors will have known each other for years and will be happy to get together to talk about their ideas. In other areas, people will have to be coaxed out of their homes with an event that allows them to get to know each other and have an inclusive discussion about the city's future.
- **Identify Winter Park's role in the region** – The vision has to create clarity on Winter Park's relationship to the rest of Central Florida. It can't be created and implemented in a geographic bubble. The city's unique position in the middle of the Orlando metropolitan area makes it completely different from municipalities that are more isolated on the outskirts. People drive into Winter Park every day to enjoy its features, and they also travel through the city on their way from one place to another.
- **Add visuals to make it understandable** – Include photographs and graphics to show examples of what Winter Park's residents consider desirable and not acceptable. The visuals will provide the context for understanding the choices residents will need to make for their future.

Steering Committee

- **Commissioners as champions, but not “owners”** – The city's elected officials should not spearhead the visioning process. It must be conducted and viewed as nonpolitical and as a community effort rather than an edict.
- **Critical to visioning process** – Establish a steering committee to manage the visioning process.
- **Diverse and representative of city** – To engage the most people and incorporate the rich diversity of the community, the committee should be made up of people from all parts of the city and a variety of interests.

Recommendations

Based on their conversations with the city's leaders, input from the community at the public hearing, and their experience with other communities, the Technical Assistance Panel made several recommendations for the city to move forward:

1) Handle the process of hiring a consulting firm as an RFP.

The city should focus on bringing in the most qualified bidders with the most creative ideas for handling a project that is so vital to the very essence of Winter Park's future. Consulting firms should be asked, "What is your experience, and how would you handle this project?" In selecting a consulting firm, the city should not choose based on lowest price but on the best idea, and then negotiate with the firm to be sure to meet Winter Park's budget for the project.

2) Make the vision a values-based process.

The vision is not a comprehensive plan for growth. Instead, it's a North Star that serves as a guide for future decisions. It looks at a bigger picture than the requirements for a comprehensive plan found in Chapter 163 of the Florida Statutes. It looks at what its citizens value today, what the city's challenges will be tomorrow, how today's values may need to change to allow the city to sustain itself in the future, and how those changes will need to be translated into specific actions.

The vision should address questions such as:

- What physical, social, cultural and other factors do Winter Park residents use to identify the city?
- What characteristics define a good quality of life for Winter Park residents?
- What are the neighborhoods and districts that form Winter Park? What are their functions and boundaries?
- What should each part of Winter Park physically look like in the future?
- How should the city function as part of the economic region?
- What are the overarching goals of the city relative to what its residents want to preserve, revitalize or redevelop?
- What actions are necessary for Winter Park to promote healthy community design?
- What five things would improve the city of Winter Park, and how should they be prioritized?

3) Make diverse citizen engagement a priority.

One of the primary purposes of preparing a vision is to engage the entire community in a discussion of what everyone values and how that translates into what they want the future to look like and how the city wants to function in the future. To that extent, you should always refer to the vision as a "Shared Vision."

4) Create a Steering Committee to oversee the project.

The visioning process should start with the selection of a "Steering Committee" by the City Council. The Steering Committee should be diverse in membership relative to geography, income and sectors of the city's economic and business interests. Commissioners should agree on a method for appointing Steering Committee members, such as three from each commission district.

Once appointed, the Steering Committee should look at each neighborhood and determine whether any could be combined because they are homogeneous in character. Additionally, the committee may want to identify “character districts” that cross neighborhood boundaries such as Fairbanks Avenue, U.S. 17-92, or other segments of road corridors.

No member of the City Commission should serve on the Steering Committee, and members of the Steering Committee should lead any meetings with the City Commission. The Steering Committee should elect a chair and vice chair to work closely with the city staff and the consulting firm.

The Steering Committee should hold at least one meeting in each neighborhood and character district, if established, to assure an understanding of the issues and gauge the community values from residents and stakeholders within the district. The Steering Committee may form subcommittees to address particular subject areas that go beyond any one neighborhood or character district.

The Steering Committee should meet prior to each public meeting to review the information to be presented and make suggested revisions and/or additions. An additional meeting after the kickoff meeting may be necessary to further educate the Steering Committee regarding physical or economic conditions that may influence the vision.

5) Organize the vision around answering four questions.

1. Where are we now?
2. Where are we going?
3. Where do we want to go?
4. How do we get there?

In addition to the standard boilerplate that is included in an RFP relative to the information requested from the city, such as the criteria for submissions and evaluation, each proposal for the work should be structured around how the consulting firm would address these four key questions. This will assure that the city is addressing all the work required in the RFP and will provide a basis for comparison. Again, it's important that the city not provide too many details in the RFP as to the content required under each question. This will allow each consulting firm to demonstrate its own creative approach.

The city should specify that it wants the selected consulting firm to use advanced visualization/computer tools that will help residents and business leaders understand with great clarity what Winter Park's various neighborhoods and character districts can look like and how they will physically function in the future. These tools also integrate critical aspects of environmental and financial sustainability. This clarity allows communities to base their decisions on a solid understanding of the costs and benefits associated with physical implications of the city building decision-making process.

It seems Winter Park is an appropriate community to lead in the evolution and use of these innovative tools. The visualization tools can help the city emphasize community-wide objectives such as healthy community design, open space and transit connectivity, affordable housing, and sustainable densities. These tools can also demonstrate for the community the possibilities of alternative futures.

6) Determine the status of the vision and how it will be used.

Once the city receives the work back from the consulting firm it hires for the visioning process, the city will have to determine whether and how it will be implemented. Will the vision provide advisory guidance on certain decisions? Or will it provide mandatory or binding direction? Some governments have incorporated this type of a vision into their comprehensive plans and apply it in development decisions. Others use a vision for strategic guidance. That will be up to the city to decide after the vision is completed.

Recommended Vision Scope of Work

Based upon the preceding recommendations, the Scope of Work for the Winter Park Vision should include the following information and components.

1. Mobilization

1.1. Project Kickoff

- 1.1.1. Project management and team responsibilities
- 1.1.2. Data availability
- 1.1.3. Finalize project schedule
- 1.1.4. Confirm public meeting venues and responsibilities
- 1.1.5. Establish social media plan

2. Public Engagement Process

2.1. Steering Committee Kickoff Meeting

- 2.1.1. Review vision process and Steering Committee roles and responsibilities
- 2.1.2. Confirm Steering Committee schedule
- 2.1.3. Establish neighborhood and district subcommittees as necessary
- 2.1.4. Confirm character districts
- 2.1.5. Discuss speaker options for kickoff and public forums
- 2.1.6. Confirm social media plan

2.2. Implement Public Engagement Process

- 2.2.1. Assist the city in implementing the public engagement process through preparation of documents and materials required to support the following public meetings.
- 2.2.2. Recommend and work with the city to implement the social media program that will be used to inform the public of the visioning process, its progress and its results.
- 2.2.3. Assist the city in developing a survey of city residents and performing keypad polling of attendees at Steering Committee and district meetings.

2.3. Public Information Meeting (Kickoff Vision Project Open House)

- 2.3.1. Introduce vision process and objectives
- 2.3.2. Introduce steering committee
- 2.3.3. Communicate vision schedule
- 2.3.4. Communicate social media program and opportunities

2.4. Public Forum I (Where Are We Now? Where Are We Going?)

- 2.4.1. Convey latest socio-demographic data/maps on Winter Park
- 2.4.2. Describe trend map(s) based on build-out scenario(s)
- 2.4.3. Breakout sessions to address SWOT analysis (strengths, weaknesses, opportunities, threats)
- 2.4.4. Summary of SWOT conclusions

2.5. Neighborhood and Character District Meetings

- 2.5.1. Meetings with residents and stakeholders of each neighborhood or character district – to relate results of trend SWOT analysis and refine based on specific neighborhood or character district input
- 2.5.2. Summary of district SWOT issues
- 2.5.3. Summary of SWOT analysis and district input
- 2.5.4. Assess Community Values — will be used to guide development of the vision and should address questions such as:
 - What physical, social, cultural and other factors do Winter Park residents use to identify the city?
 - What characteristics define a good quality of life for Winter Park residents?
 - What are the neighborhoods and districts that form Winter Park? What are their functions and boundaries?
 - What should each part of Winter Park physically look like in the future?
 - How should the city function as part of the economic region?
 - What are the overarching goals of the city relative to what its residents want to preserve, revitalize or redevelop?
 - What actions are necessary for Winter Park to promote healthy community design?
 - What five things would improve the city of Winter Park, and how should they be prioritized?

2.6. Community Forum II (Where Do We Want to Go?) Vision Scenarios

- 2.6.1. Summary of community values assessment
- 2.6.2. Build-out scenario(s) based on neighborhood and character district input
- 2.6.3. Vision statement and strategic objectives
- 2.6.4. Keypad polling to gauge consensus

2.7. Community Forum III: (How Do We Get to Our Destination?) Vision and Action Plan Presentation by Steering Committee

- 2.7.1. Summary of the vision plan
- 2.7.2. Recommended actions to achieve the vision
- 2.7.3. Recommended actions to monitor progress and make necessary adjustments
- 2.7.4. Recommended actions to market the vision

2.8. Steering Committee

- 2.8.1. Prepare for and attend each meeting of the Steering Committee. The Steering Committee must be formed prior to beginning the public engagement process and at a minimum will include one representative from each of the defined districts. The Steering Committee should meet prior to each public meeting to review the information to be presented and make suggested revisions and/or additions. Subcommittees of the Steering Committee may be developed to consider particular aspects of the vision. An additional meeting after the kickoff meeting may be necessary to further educate the Steering Committee regarding physical or economic conditions that may influence the vision.

2.9. Social Media Plan

- 2.9.1. Recommend social media to be used to inform and solicit community feedback
- 2.9.2. Provide keypad polling or similar equipment to gauge community consensus at steering committee and community district meetings
- 2.9.3. Assist city staff in preparing survey questions to assess city values

3. Preparation of the Vision and Action Plan

3.1. Data Collection and Analysis (Where Are We Now?)

- 3.1.1. Assembly of latest socio-economic data to demonstrate current conditions in the city and comparison to other cities of similar size and location in the metropolitan area
- 3.1.2. Growth forecasts – Use the University of Florida Bureau of Economic and Business Research (BEBR) and other sources to forecast probable growth in the city and how it will impact the demand for residential and non-residential development and the demand on key city infrastructure and services.

3.2. Trend Scenario Mapping, SWOT Assessment and Neighborhood and Character District Values Assessment (Where Are We Going?)

- 3.2.1. Prepare a trend map for the city illustrating what build-out of the city may look like, including probable redevelopment scenarios. Use advanced visualization computer tools to demonstrate the trend map. This is not a land use plan and should use categories and vocabulary significantly different than those used in the City Land Use Plan.
- 3.2.2. Prepare a map of each neighborhood and character district in the city for use in district meeting and SWOT assessment.
- 3.2.3. Prepare PPT and appropriate handouts to inform citizens of the key data points and trend development scenarios.
- 3.2.4. Prepare for and facilitate Community Forum I.
- 3.2.5. Prepare for and facilitate neighborhood and character district meetings including refinement of SWOT and performance of values assessment.

3.3. Preparation of Draft Winter Park Vision Scenario(s) (Where Are We Going?)

- 3.3.1. Prepare summary results of the SWOT analysis and the values assessment held in each of the neighborhoods and character districts.
- 3.3.2. Prepare the draft Vision Statement and Strategic Objectives for achieving the vision. The consultant will also prepare an illustration of what Winter Park would look like if the vision were achieved. This illustration should use advanced visualization computer tools to demonstrate the trend map.
- 3.3.3. Facilitate Community Forum II to inform city residents of the results of previous tasks and to (using keypad polling or other similar assessment mechanism) assess consensus for the results of the SWOT, Community Values Assessment and Draft Vision.

3.4. Preparation of City of Winter Park's Shared Vision and Action Plan (How Do We Get There?)

- 3.4.1. Prepare the final draft of the city's Shared Vision and an Action Plan for assuring its achievement. The plan must include an analysis illustrating how the plan achieves the principle values for the city that resulted from the public engagement process and must include strategic objectives and benchmarks for achieving those objectives that allow the city to measure progress over time and make adjustments, when necessary.
- 3.4.2. The Action Plan must address how the city will market the vision to assure that all decisions are being viewed through the context of consistency or realization of the Shared Vision.
- 3.4.3. Facilitate the final Community Forum III to inform city residents and stakeholders about the Shared Vision and Action Plan.
- 3.4.4. Preparation of a PPT executive summary of the Shared Vision for use by the city and key organizations to market the Shared Vision inside and outside the city of Winter Park.

3.5. Presentation to City Commission

- 3.5.1. Assist the Steering Committee and staff in the presentation of the Shared Vision to city commission for its acceptance.



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