

Economic Development Advisory Board

February 16, 2016 at 8:15 a.m.

Winter Park City Hall, Chapman Room
401 Park Avenue S., Winter Park, FL 32789



1 administrative

- a. Approve minutes from 12-15-2015

2 action

- a. Business clusters scope

3 informational

- a. Winter Park Library update
- b. Comprehensive Plan - Economic Development Element
- c. City updates

4 new business

5 public comment

adjourn

Next meeting: March 15th

appeals & assistance

"If a person decides to appeal any decision made by the Commission with respect to any matter considered at such meeting or hearing, he/she will need a record of the proceedings, and that, for such purpose, he/she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based." (F. S. 286.0105).

"Persons with disabilities needing assistance to participate in any of these proceedings should contact the City Clerk's Office (407-599-3277) at least 48 hours in advance of the meeting."

Economic Development Advisory Board



meeting date 2-16-16

approved by

item type ☒ Administrative
☐ Action
☐ Information

☐ City Manager
☐ City Attorney
☐ N/A

**agenda
item**

Subject 1

Approve minutes dating December 15, 2015

motion | recommendation

Motion to approve minutes from December 15, 2015 is requested.

Background

**CITY OF WINTER PARK
ECONOMIC DEVELOPMENT ADVISORY BOARD**

**Regular Meeting
8:00 a.m.**

**December 15, 2015
Chapman Room**

MINUTES

Meeting was called to order at 8:16 a.m. in the Chapman Room of City Hall.

BOARD MEMBERS PRESENT: John Caron, Marc Reicher, Kelly Olinger, Patrick Chapin, Steve Flanagan, Owen Beitsch

BOARD MEMBERS ABSENT: John Gill, Maura Weiner

STAFF MEMBERS PRESENT: Dori Stone, Kyle Dudgeon, Allison McGillis, Laura Neudorffer

ADMINISTRATIVE ITEMS:

A. Approval of the November 17, 2015 Minutes

Motion made by Marc Reicher, seconded by Steve Flanagan, to approve the November 17, 2015 minutes.

ACTION ITEMS:

INFORMATION ITEMS:

A. 2015 Business Survey Results Part II- Re-analysis:

Staff reviewed the results with the Board and allowed for feedback and comments. Feedback was received from 87 downtown area businesses and 42 businesses from other corridors. The one difference between the downtown corridor and the other corridors was in the investment plans where members of the downtown area were more interested in focusing on system improvements and software upgrades while the other corridors were interested in focusing on new products. Rent was found to be quite similar across all of the corridors.

B. Role of EDAB

Staff provided a review of what the role of the board consists of as requested by the Board members and touched on the relationship between EDAB and P&Z. Staff provided sections of the Ordinance to the board for review.

C. EDAB Plan Review

Staff briefly discussed the EDAB plan and allowed for feedback and discussion.

D. City project updates

Staff discussed Progress Point, Historic Preservation, and Visioning with Board members and allowed for feedback. A discussion regarding best use ensued for Progress Point. Staff stated there were over 40 requests for NOD for Progress Point submittal package.

NEW BUSINESS

There being no further business, the meeting adjourned at 9:30 a.m.

John Caron, Chairperson

Laura Neudorffer, Board Liaison

Economic Development Advisory Board



meeting date 2-16-16

approved by

item type ☐ Administrative
☒ Action
☐ Information

☐ City Manager
☐ City Attorney
☐ N/A

**agenda
item**

Subject 2a

Business clusters scope

motion | recommendation

Motion to approve the scope is requested.

Background

In 2009, staff generated a Winter Park Cluster Analysis for the purpose of identifying which business types play a significant role in the local economy. The final report determined there were several targeted industries in which Winter Park had a higher concentration than the average. This is done by performing a location quotient analysis. A Location quotient (LQ) quantifies how concentrated a particular industry, cluster, occupation, or demographic group is relative to another area. It can reveal what makes a particular region “unique” in comparison to the average. In Winter Park these included:

- Education and Knowledge Creation
- Real Estate and Development
- Arts and Culture
- Health Care Services
- Financial and Professional Services
- Creative Services

Based on these findings, staff was able to use this information to implement programs such as the Targeted Industry Enhancement grant program which played a pivotal role in the recruitment of Ruth’s Chris Headquarters.

However for the purposes of creating information that is more relevant to today’s context, the focus for this cluster analysis will shift slightly. While maintaining and incorporating the richness of the 2009 data, the 2016 report will focus on information that is applicable to the upcoming generation of an Economic Development Element to be implemented in the Comprehensive Plan. Florida statute states that all elements of the plan must be based upon relevant and appropriate data which provides a springboard for the analysis.

SCOPE:

The scope will focus on these major topics:

- Location quotients – local/regional comparison
- Comparison of data sets from 2009 to 2016
- How clusters/employment sectors compare regionally
- Correlation analysis: Is current land use amenable to these growing clusters from an end user perspective. Is there room for growth?

METHODOLOGY:

A location quotient is calculated by comparing the cluster's share of total local employment to the cluster's regional/county share. The location quotient will yield a value general between 0 and 2, where the result of 1 demonstrates that the cluster has an average share of the local economy.

Using employment data provided by the Bureau of Labor Statistics, Dun & Bradstreet, and the Census, staff will perform a location quotient analysis on all super-sectors industries using the North American Industrial Classification System (NAICS).

Data will be compared to the 2009 study to determine any significant change. Additionally; to put this in context, staff will analyze how these clusters compare versus other municipalities for an 'apples to apples' comparison. For example, the data may find that 20% of total workers in Winter Park are in the Professionals category, but only 12% total workers are in this category in Maitland.

Finally, an analysis comparing current land use patterns with top clusters will be administered. Based on the results, inferences could be made on whether or not the city's development pattern is commensurate with the local economy.

DELIVERABLE:

Staff will develop a report to be reviewed by the Economic Development Advisory Board that will incorporate the scope elements with the option for retooling based on feedback at a future meeting.

City of Winter Park Industry Cluster Analysis



January 5, 2009

Table of Contents

Executive Summary	3
Recommendations	5
Purpose and Scope	6
Identification of Industry Clusters	6
Contextual Factors.....	7
United States.....	7
State of Florida	8
Orlando CBSA.....	8
City of Winter Park.....	10
Winter Park Targeted Industry Clusters	10
Education and Knowledge Creation.....	14
Real Estate and Development	14
Arts and Culture Cluster.....	15
Health Care Services Cluster.....	16
Financial and Professional Services Cluster	16
Creative Services Cluster	17
Cluster Relationship	18
Appendices.....	19
Industry Clustering Methodology	19
Data Sources and Processing.....	21
Employee Lotation Quotients.....	22
Top Ten Employers	23

Executive Summary

The development of competitive industry clusters is one of the key generators of regional wealth. A cluster develops when businesses in similar industries are located near each other and can take advantage of local strengths and assets. These symbiotic businesses become dependent on each other and the local resources and support infrastructure that exists in a community. The interdependence of these companies creates a competitive edge allowing these businesses to hone their expertise in their field.

Industry clusters strengthen competitiveness by increasing productivity, stimulating innovative new partnerships, even among competitors, and by presenting opportunities for entrepreneurial activity.

The targeted industry clusters identified in this report are based on a review of national, state and regional employment data and characteristics. A cluster analysis was conducted to determine which industries are currently concentrated within the City of Winter Park. Factors that impact the selection of clusters were assessed, as well as local assets and community goals. The methodology used to complete this analysis is described in the Appendix.

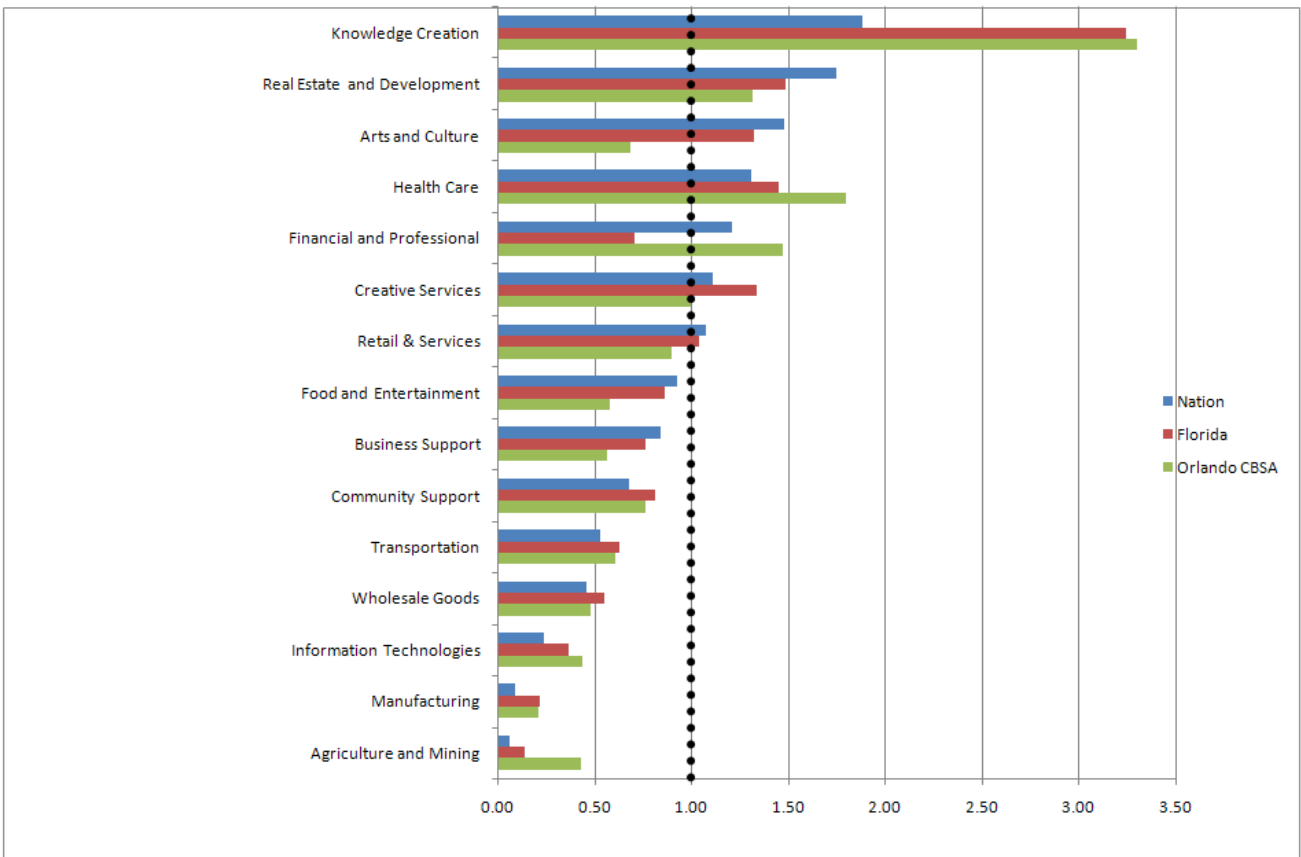
The following targeted industry clusters have been identified:

- **Education and Knowledge Creation**
- **Real Estate and Development**
- **Arts and Culture**
- **Health Care Services**
- **Financial and Professional Services**
- **Creative Services**

A description of each targeted industry cluster listed above is provided beginning on page 10. It should be noted that Retail and Services also scored a location quotient over 1.0 for the nation and state. Retail and Services typically serves the demand generated by the local population. This cluster will need to be studied further to determine if it is serving a larger trade area before recommending it for a targeted cluster.

An employee location quotient was calculated for the nation, state and region to determine which clusters were dominant in the City of Winter Park. Clusters were targeted if they had a location quotient greater than 1.00 and the critical mass needed to create the synergy and relationships needed to grow and deepen expertise within these clusters. The following charts reflect the outcome of the cluster analysis and location quotient exercise.

Cluster Distribution Chart



Cluster Location Quotients for the U.S, State and Region

Cluster	Nation	Florida	Orlando CBSA
Education and Knowledge Creation	1.89	3.24	3.30
Real Estate and Development	1.75	1.49	1.32
Arts and Culture	1.48	1.32	0.70
Health Care Services	1.31	1.45	1.80
Financial and Professional Services	1.21	0.71	1.47
Creative Services	1.11	1.34	1.00
Retail & Services	1.08	1.04	0.90
Food and Entertainment	0.93	0.87	0.58
Business Support Services	0.84	0.77	0.57
Community Support Services	0.68	0.82	0.77
Transportation	0.53	0.63	0.61
Wholesale Goods	0.46	0.55	0.48
Information Technologies	0.24	0.37	0.44
Manufacturing	0.09	0.22	0.21
Agriculture and Mining	0.06	0.14	0.43

Recommendations

- Develop specific strategies for the six targeted clusters.
- Develop an Assets and Opportunities Map.
- Ensure the City's Plan and CRA Plan compliment targeted cluster strategies.
- Establish working committees to support select targeted clusters.
- Engage the Winter Park Chamber of Commerce to assist in developing strategies for targeted clusters.
- Leverage activities and assets within the Metro Orlando area that benefit the City of Winter Park's economic development activities.
- Establish a strategic working relationship with Universities to identify opportunities that enable targeted industry clusters to grow.
- Develop a retention and recruitment program for targeted industry clusters.
- Create a business climate that helps entrepreneurs launch successful new companies.
- Identify benchmark communities and learn from them. Santa Fe, Asheville, and Charleston are three to consider. All three of these communities acknowledge that arts and culture are essential to their economic viability.
- Complete an examination of all events held within the City to ensure they promote and support targeted clusters. For instance, the Florida Film Festival supports Film and Digital Media which is a niche cluster within Creative Services. Working with the Florida Film Festival to create more exposure for Winter Park should be a consideration.
- A medical district that targets a niche health care cluster, within proximity to Florida Hospital and Winter Park Memorial Hospital could bolster this cluster.
- An Arts and Design School that would support the Creative Services cluster should be explored. Savannah, Charleston and Providence have schools that would be good models. All three cities have a strong Creative Services cluster.
- The Retail & Services cluster had a location quotient over 1.0 for the nation and state. Retail is typically viewed as a basic industry, providing those services needed to meet the demand of the local population. The City of Winter Park should consider evaluating the retail services cluster and identify strategies to retain, grow and sharpen niche retail that supports the other clusters, such as Arts and Culture and Creative Services.
- Winter Park is strategically located and has the assets and venues to play an important role in the Cultural Arts Corridor and in hosting flagship events. Working with the other communities and arts organizations to find mutually beneficial programs and events would be a good place to start.
- Winter Park also has many mid-sized (approximately 50 employees) investment and insurance companies. The City should examine opportunities for their retention and growth so they will remain within Winter Park.

Purpose and Scope

The purpose of this analysis is to provide a basis for identifying which business types will play a major role in fostering the economic sustainability of the City of Winter Park in the future. This task is accomplished by identifying and examining the importance of related economic activities - or industry clusters.

An industry cluster develops when businesses in similar industries are located near each other and are able to take advantage of local strengths and assets. These symbiotic businesses become dependent on each other and the local resources and support infrastructure that exist in a community. The interdependence of these companies creates a competitive edge allowing these businesses to hone their expertise in their field. Industry clusters grow faster, become more profitable, find efficiencies and new technologies, and pay higher wages. Industry clusters strengthen competitiveness by increasing productivity, stimulating innovative new partnerships, even among competitors, and presenting opportunities for entrepreneurial activity.

Identification of Industry Clusters

The target industry clusters identified in this report are based on a review of national, state and regional employment data and characteristics. A cluster analysis was conducted to determine which industries are currently concentrated within the City of Winter Park. Factors that impact the selection of clusters were assessed, as well as local assets and community goals.

This analysis focused on “primary” industries, or those industries that provide, produce or export goods or services within and outside the region, supporting local industries. Primary industries create wealth, by an injection of money from outside the community. The multiplier is higher for primary industries versus “basic” industries. Basic industries provide those basic services necessary to serve the community’s population. Basic industries such as retail and personal services were not the focus of this study, since those industries are created and sustained based on population demand.

Industry clusters are made up of businesses that are connected by the flow of goods and services, resources and infrastructure that are stronger than the links to the general economy. Businesses that comprise industry clusters are said to “chain” together.

A *vertical value chain* is created when there is interaction between core production processes and the inputs and distribution of the goods or services. This would encompass all the businesses involved in getting a product to market.

A *horizontal peer chain* is created when businesses that compete frequently share information about products and processes and formally collaborate to develop such innovations through strategic alliances.

A *horizontal support chain* is created from shared technology, labor force or information, even among companies that may produce unrelated goods or services.

Contextual Factors

It is important to understand targeted industry clusters that are growing in the United States, the state and the region. Industry clusters such as Financial and Professional Services, Health Care and related fields, Energy and Information Technology are targeted for growth at the national and state level. This provides a strong indicator as to what industry clusters might be successful at the local level. It also allows a community to take advantage of existing clusters and identify niche clusters that can be leveraged.

United States

While the national economy will continue to face tumultuous times due to the housing market and the Wall Street financial crisis for another two years, there will be opportunities within regional economies to grow businesses. These opportunities will be more difficult to bring to fruition due to business costs, lukewarm demand and a tight lending market. National industry clusters are as follows:

U.S. Targeted Industry Clusters

- Advanced Manufacturing
- Aerospace
- Automotive
- Biotechnology
- Construction
- Energy
- Financial Services
- Geospatial Technology
- Health Care
- Homeland Security
- Hospitality
- Information Technology
- Retail
- Transportation

Source: Bureau of Labor Statistics. Highlighted clusters are aligned with Winter Park.

State of Florida

The state of Florida has received an economic blow due to an overbuilt and overvalued housing market. Florida has experienced steady growth, fueling the construction and development cluster. However, new development has stalled out in all areas for right now due to sluggish demand and uneasiness with Wall Street and US financial institutions. The state relies upon an organization called Enterprise Florida to recruit and grow companies throughout the state. Florida is gearing up for the technology transfer and innovation that will be taking place for alternative power sources and delivery through clean energy and emerging technologies and state officials are positioning Florida to play a major role in developing these new technologies. The state's industry clusters are shown below.

State Forecast

0.5% employment growth in 2008

1.9% employment growth rate for 2009-2011

Job growth will not return to Construction until 2010, with a 2.7% growth rate

High growth sectors during 2008-2011 include Professional and Business Services (4.0%), Education and Health Services (2.9%), Trade, Transportation and Utilities (1.8%) and Leisure and Hospitality (1.4%)

Source: UCF Florida and Metro Forecast, 9/08

Florida's Targeted Industry Clusters

- Clean Energy
- Life Sciences
- Information Technology
- Aviation and Aerospace
- Homeland Security/Defense
- Financial/Professional Services
- Manufacturing
- Emerging Technologies

Source: Enterprise Florida. Highlighted clusters are aligned with Winter Park.

Orlando CBSA

The Metro Orlando area is comprised of four counties with a population over 2 million. Orlando's economy is fueled by tourism and technology. While Orlando is known as the number one tourist destination in the world, what many do not know is that Orlando boasts a \$13.4

billion technology industry that employs close to 53,000 people. A number of strong and established industry sectors are based in Metro Orlando. Advanced manufacturing, aviation and aerospace, modeling, simulation and training, optics and photonics and life science and biotechnology are a few of the growing industry clusters. The southeast area of Orange County offers the most promise for the future. With the construction of Innovation Way, the extension of Alafaya Trail south to the Orlando International Airport will open up the Southeast quadrant of Orange County. UCF's research park has plans to expand and UCF is currently establishing its Medical School at Lake Nona. This area is expected to emerge into a biotechnology center. All of this activity is directly adjacent to the Orlando International Airport which is a world class airport. While Orlando's growth and economic activity overshadow smaller communities within the region, Winter Park can leverage off of Orlando's assets and find niche clusters that compliment Orlando's targeted clusters and the synergy that is created among them. Digital media, along with Film and Television Production may offer the most promise among Orlando's targeted clusters.

The Florida High Tech Corridor, which runs from Daytona Beach along I-4 to Tampa, represents the clustering of high tech businesses along this corridor representing over 5,000 businesses. Winter Park is located in the center of this corridor, with major employment centers dotted along the corridor. One of the largest employment centers, Downtown Orlando's Central Business District, is located just a few miles south of Winter Park.

Metro Orlando's Targeted Industry Clusters

- Advanced Manufacturing
- Agritechnology
- Aviation & Aerospace
- Clean technology and Sustainable Energy
- Customer Support and Back Office
- Digital Media
- Film and Television Production
- Life Science and Bio Technology
- Manufacturing, Warehousing and Distribution
- Modeling, Simulation and Training
- Optics and Photonics
- Software and Hardware

Source: Metro Orlando Economic Development Commission. Highlighted clusters are aligned with Winter Park.

City of Winter Park

Winter Park is a small city neighboring a much larger city, within a large region with a population over 2 million people. Major community assets are the built environment, the thriving Central Business District, desirable neighborhoods, high quality of life, Rollins College, Winter Park Memorial Hospital, and the proximity to Downtown Orlando's Central Business District, Maitland Center, University of Central Florida and the Orlando International Airport.

Interstate 4 functions as one of the major spines for the region and Winter Park benefits from Interstate 4 and has good access to this highway. Winter Park is also located within the Cultural Arts Corridor that begins in Maitland and ends in Downtown Orlando.

The City of Winter Park has a 2007 population of 28,486 and 2008 employment totaling 31,226. 3,065 businesses are located within the city limits. Sixty percent of these businesses have less than 50 employees. Winter Park's economy is driven by small boutique businesses and the environment they need to succeed.

Source: Info USA data

Winter Park Targeted Industry Clusters

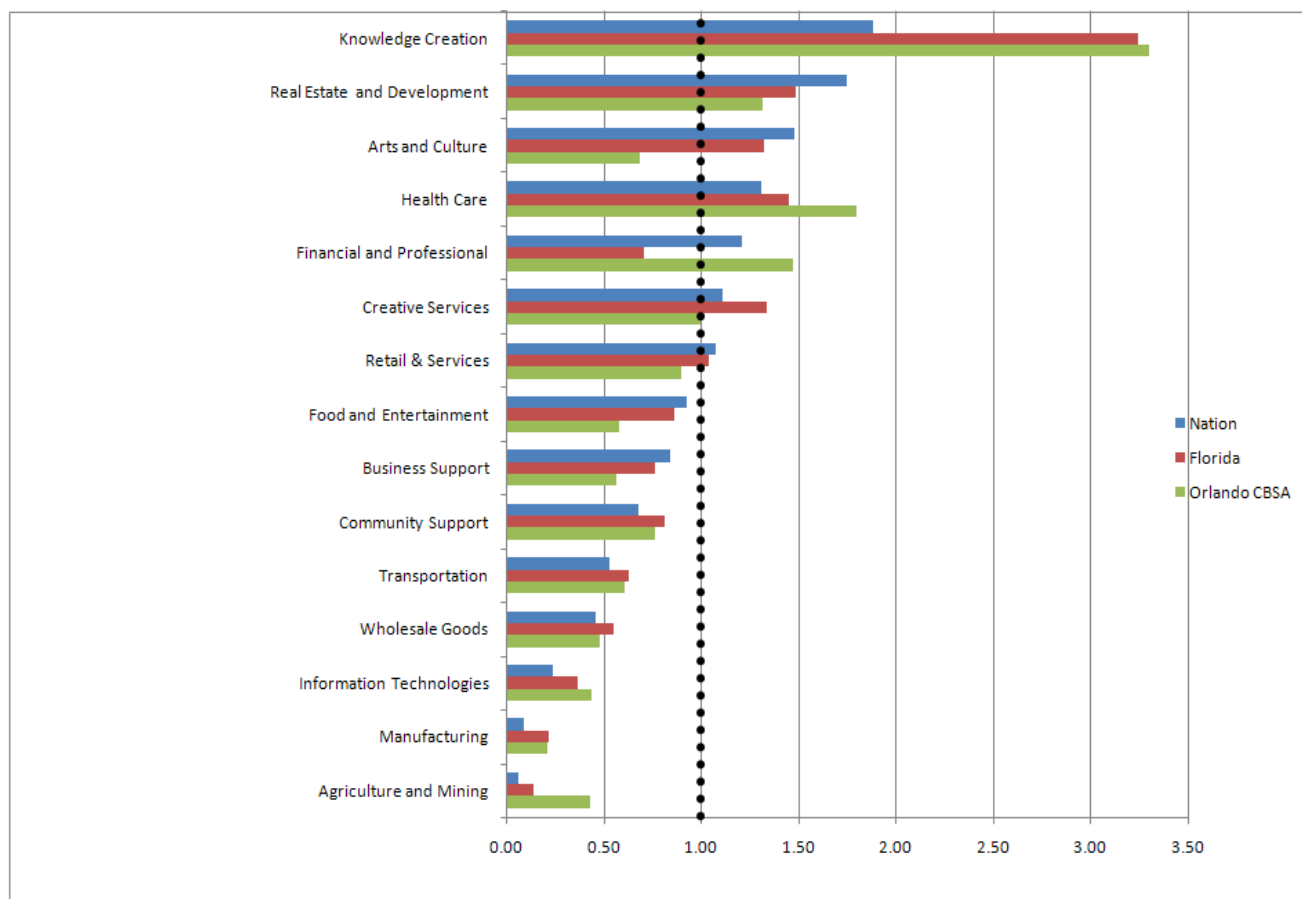
This study analyzes the City of Winter Park's business community to determine if any industry clusters are dominant, existing or emerging. Based on evaluating employment data and comparing this data to national, state and regional employment data using a location quotient, the following clusters have been identified:

- Education and Knowledge Creation
- Real Estate and Development
- Arts and Culture
- Health Care Services
- Financial and Professional Services
- Creative Services

A description of each industry cluster listed above is provided, followed by the analysis that was conducted.

Six clusters have been identified for further refinement and study. These clusters revealed a location quotient greater than 1.00 and the critical mass needed to create the synergy and relationships needed to grow and deepen expertise within target clusters. The following pages reflect the outcome of the cluster analysis and location quotient exercise. The methodology explaining how the charts were developed is located in the Appendix.

Cluster Distribution Chart



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Information Technologies	0.24	0.37	0.44
Manufacturing	0.09	0.22	0.21
Agriculture and Mining	0.06	0.14	0.43

Cluster Details

Cluster	Industries	NAICS 5-digit Codes	Employment	% of Total Employment	Location Quotient (Nation)
Education and Knowledge Creation	Education at all levels, research and development activities	61131 Colleges, Universities and Professional Schools 61171 Educational Support Services 51912 Libraries and Archives	1,809	5.8%	1.89
Real Estate and Development	Construction companies and real estate professionals	23611 Residential Building Construction 23621 Industrial Building Construction 23622 Commercial and Institutional Building Construction 53121 Real Estate Agents and Brokers	4,219	13.5%	1.75
Arts and Culture	Visual and Performing Arts, Artists, Writers, Museums and Historical Sites	45392 Art dealers 71151 Independent Artists, Writers And Performers 71211 Museums 71111 Theatre Companies	271	0.8%	1.48
Health Care Services	Health care professionals, and hospitals, and diagnostic labs	54138 Testing Laboratories 62149 Medical Diagnostic Laboratories 62211 General Medical and Surgical Hospitals	5,378	17.2%	1.31
Financial and Professional Services	Financial institutions, banks, accounting firms, insurance companies	52211 Commercial Banking 52231 Mortgage Loan Brokers 52311 Investment Banking and Securities 52421 Insurance Agencies and Brokerages	5,035	16.1%	1.21
Creative Services	Advertising, publishing, digital media, graphic design, architects and interior design	54143 Graphic Design 54141 Interior Design 54181 Advertising 54192 Photographic Services	3,181	10.1%	1.11

Winter Park Cluster Total Breakdown

Cluster	Employees	Cluster/Total	Establishments	Cluster/Total
Real Estate & Development	4,219	0.1351	424	0.1383
Creative Services	3,181	0.1019	347	0.1132
Financial and Professional	5,035	0.1612	675	0.2202
Health Care Services	5,378	0.1722	409	0.1334
Arts and Culture	271	0.0087	55	0.0179
Education & Knowledge Creation	1,809	0.0579	75	0.0245
Information Technologies	94	0.0030	8	0.0026
Manufacturing	233	0.0075	24	0.0078
Community Support	1,146	0.0367	156	0.0509
Agriculture & Mining	18	0.0006	2	0.0007
Transportation	1,091	0.0349	96	0.0313
Business Support Services	999	0.0320	83	0.0271
Wholesale Goods	588	0.0188	66	0.0215
Retail & Services	4,072	0.1304	485	0.1582
Food & Entertainment	3,092	0.0990	160	0.0522
	31,226		3,065	

Source: InfoUSA, 2008

Education and Knowledge Creation Cluster

Education and Knowledge Creation includes education at all levels along with research and development activities. This cluster does not create wealth, but knowledge. This is considered the most dominant cluster.

Winter Park is fortunate to have Rollins College embedded within the fabric of the community. University of Central Florida is also an enormous asset, along with Valencia Community College. There are some potential synergies between the Creative, Financial and Professional Services, and Real Estate and Development Clusters and Rollins College and the University of Central Florida.

Full Sail University, which is just outside the city limits provides an opportunity for collaboration and partnership. While not included in the cluster analysis, it should be acknowledged since it impacts Winter Park and is an employment and student center. Full Sail University is important to the Metro Orlando's film and digital media industry cluster and compliments the City of Winter Park's creative services cluster.

Higher education is positioned to be the catalyst for new ideas, new thinking, and research impacting almost every aspect of the economy. University campuses are considered to be filled with the "creative class." Identifying ways to keep graduates from leaving and finding work elsewhere should be pursued. While not wealth generating from a business perspective, research assets such as these are valuable commodities for the creation of a high-knowledge work force and spin-off commercialization activities. Rollins College represent over 600 jobs.

Working closely with Rollins College to align curriculum, programs and research to compliment target industry clusters will be important. A good example of University programs working hand in hand with economic development efforts is the Crummer School of Business. The business school is an asset and supports the Financial and Professional Services Cluster. Research opportunities, as well as collaboration, will spur growth within targeted clusters.

There is an opportunity to create a School of Art and Design within the Metro Orlando region. A school of this type would be a catalyst for the Creative Services and Construction clusters. There have been discussions with other Schools to open an extension in the Metro Orlando area. There may be an opportunity, working with Rollins College, to create a program that caters to the interior and graphic designers, advertising and architecture fields.

Real Estate and Development

The construction industry is feeling the effects of the slump in the housing market. Although this cluster represents a large proportion of jobs, this industry is largely driven by local market

factors and does not export goods outside of the region. Because of this, it should not be considered a primary industry.

There are new techniques for construction with an emphasis on green or eco-friendly development. This could be a niche within this cluster for Winter Park. It seems Winter Park already has a niche for high end, high quality residential development. State of the art construction would blend well with the expertise of the existing businesses. Many of the businesses within the Creative Services Cluster also have a strong relationship with this cluster. For instance, interior designers, architects and artisans also serve and support this cluster.

Educational programs, specialty schools, exhibits, conferences and trade shows that show case state of the art development and construction techniques would enhance this cluster. Winter Park should consider hosting some of the Urban Land Institute (ULI), Congress for New Urbanism (CNU), Florida American Planning Association and the Florida Green Building Coalition (FGBC) events and ask local businesses in the industry to sponsor the event.

Real estate professionals are included in this cluster, which represent approximately 2,000 jobs. Also, Hubbard Construction is included in this category. Hubbard Group, Inc. is one of the largest employers, with over 1,000 employees, with a focus on highway construction.

Arts and Culture Cluster

Arts and Culture is an important cluster to Winter Park, since it plays a large role in making Winter Park a desirable place to live and work. A community steeped in arts and culture is a magnet for the “creative class” and the creative talent they possess. Winter Park is strategically located along the Cultural Arts Corridor, which begins in Maitland, with the Maitland Arts Center, with venues clustered along the 17-92 corridor, heading south to the Downtown Central Business District. Anchor venues along this corridor include the Enzian Theatre, which is home to the Florida Film Festival, the Orlando Museum of Art, the Orlando Civic Theatre, the Morse Museum, the Orlando Science Center, the Mennello Museum, Leu Gardens, the History Center and the Bob Carr Theatre. Along this corridor are smaller community theatres, art and antique dealers and galleries. Winter Park is firmly embedded within the Cultural Arts Corridor and can continue to carve out a niche within this cluster.

The City of Winter Park also hosts some signature events, such as the Winter Park Arts Festival and the Florida Film Festival that provide national and state exposure. Events, such as these, along with the venues described above, provide Winter Park with an image that this is a community that loves the arts.

Winter Park is strategically located and has the assets and venues to play an important role in the Cultural Arts Corridor and in hosting flagship events. Working with the other communities and arts organizations to find mutually beneficial programs and events would be a good place to start.

Health Care Services Cluster

Health Care includes the Winter Park Memorial Hospital, and all the health care related businesses located within the City. Health care will be a high growth industry, due largely to the aging U.S. population which will grow over the next 20 years. As the population ages, there will continue to be a growing demand for new medical technology and treatments to sustain and improve the quality of life of this segment of the population. The recent expansion of the Winter Park Memorial Hospital is testament to the demand being placed on this industry. This cluster is expected to experience high growth over the next five years.

The Florida Hospital campus, just south of Winter Park is a major employment generator. An expansion at this campus has also been underway. Because of the hospital's proximity to the City of Winter Park, there may be opportunities to provide peripheral medical services close to Interstate 4.

This industry is largely driven by local market factors and does not export goods outside of the region. Because of this, it is not considered a primary industry. While that is the case now, it does not have to remain that way. Working closely with health care executives, opportunities for creating a niche within the larger cluster is possible. There will be ample opportunities to take advantage of the economic activities going on within the region associated with biotechnology and life sciences clusters.

Creating a medical district that targets a niche within the health care cluster, within proximity to Florida Hospital and Winter Park Memorial Hospital could bolster this industry cluster.

Financial and Professional Services Cluster

The Financial and Professional Services cluster requires an educated workforce and an existing base of companies requiring technical support and general business services. The financial and professional services cluster is comprised of four primary sectors: banking, securities and commodities, professional business and insurance.

This cluster has been identified at the national and state level as an industry cluster and is expected to experience one of the highest growth rates over the next five years. This cluster has the greatest critical mass and is a high growth industry for the nation and state. This cluster is made up of banking, securities and commodities, professional business and insurance. This is an important cluster for Winter Park, with financial and investment services identified as a niche within this cluster.

An educated workforce is needed with an existing base of companies requiring technical support and general business services. Many of these businesses want to be within a downtown environment, so this cluster will benefit the Central Business District and Community

Redevelopment Agency. Mercantile Bank is one of the largest employers within this cluster, with over 500 employees. Winter Park also has many mid-sized (approximately 50 employees) investment and insurance companies. The City should examine opportunities for their retention and growth so they will remain within Winter Park.

Creative Services Cluster

The creative services cluster is a combination of various industry sectors that rely upon “creative” talent. Businesses in these industries cluster together because of a unique set of qualities that exist within a highly desirable community. They rely upon creative talent, rather than supplier advantages or value chain synergies. Richard Florida’s book, “The Creative Class,” examines the creative talent and offers the premise that recruiting creative people is more important than trying to recruit creative industries. Focusing on specific quality of life issues tends to be more important when trying to cultivate and grow this cluster than business recruitment. The focus should be on recruiting the people and talent rather than companies. This also lends well to the premise that creating and growing companies is more effective as an economic development tool than business recruitment.

Richard Florida's definition of the creative class, includes occupations that require high levels of creativity. The CreativeClass.com website provides the following broad definition.

The Creative Class® -- thinkers, innovators, decision-makers -- influences cultural phenomenon and impacts business.

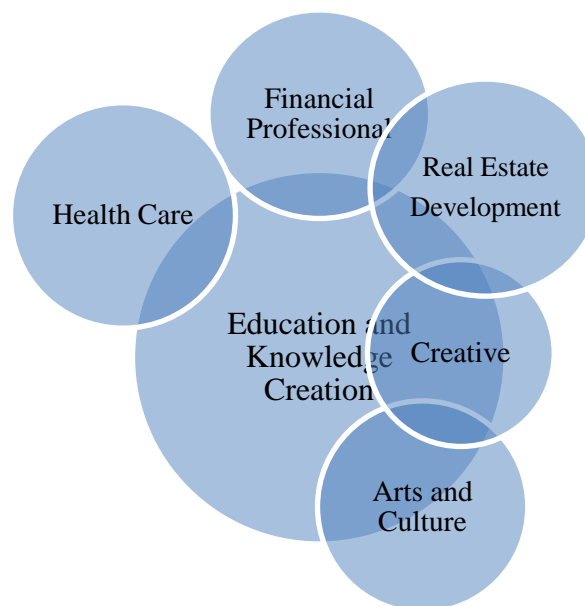
Winter Park provides the ideal setting in which to draw these individuals. The Orlando region has been identified as a “creative” community, with many of the attributes needed to grow this cluster and attract creatively-minded individuals. Graphic designers, interior designers, and architects, landscape architects and software developers are some of the creative talent in Winter Park. For the purposes of this analysis, architects, landscape designers and architects, planners and engineers were grouped within the Creative Services Cluster, but it should be noted that these workers also support the Construction and Development Cluster. Arts and culture make Winter Park attractive to creative talent.

Full Sail University is located just outside the city limits, and Electronic Arts is located just to the north in Maitland, with UCF’s Digital Media School located in Downtown Orlando. There may be some synergies to make this an opportunity for Winter Park. Digital Media and Film and Television Production are targeted clusters for the Orlando region. Winter Park is home to the Florida Film Festival, which provides an opportunity to showcase local film and digital media.

Cluster Relationship

Education and Knowledge Creation should support all targeted clusters. If any of the targeted clusters are not being supported by educational programming, research and development, then a gap exists and should be filled with adequate support. The Creative Services and Real Estate and Development overlap are due to architecture and design work provided by the Creative Services cluster. The Creative Services and Arts and Culture clusters complement one another, with Arts and Culture being pivotal to the growth of the Creative Services cluster. Financial and Professional and Real Estate and Development are interconnected due to the support role Financial and Professional provides to Real Estate and Development. Legal advice, insurance, due diligence and project financing are all provided to the Real Estate and Development cluster from the Financial and Real Estate and Development cluster. Health care has the least amount of overlap with the other clusters, relying mostly on Education and Knowledge Creation.

The chart below depicts the relationship between the six clusters.



Appendices

Industry Clustering Methodology

Numerous structures exist to classify industries, the most universal being the Standard Industrial Classification (SIC) system. Currently, the federal Bureau of Labor Statistics is immersed in a four-year conversion from the more than 70-year old SIC system created during the height of the industrial age, to the North American Industrial Classification System (NAICS). Based on a consistent principle that businesses that do similar things in similar ways are grouped together, NAICS identifies hundreds of new, emerging and advanced technology industries by reorganizing industries into more meaningful sectors.

The SIC system groups industries into ten major classifications. The NAICS combines unique industries into twenty broad industry sectors (i.e. manufacturing; professional, scientific and technical services; healthcare and social assistance). Sector initiatives have become useful strategies for workforce development, particularly when focused on improving job opportunities and economic prospects for low-income individuals. While an industry sector, in some cases, may be synonymous with an industry cluster, an authentic industry cluster is much broader than one sector.

3-digit SIC codes and 5-digit NAICS codes were analyzed. Since the 5 digit NAICS codes provided more flexibility in categorizing industry types into clusters, this was the data set used to establish clusters. The following clusters were created in order to group all the employment data:

- Financial and Professional Services
- Real Estate and Development
- Creative Services
- Health Care
- Arts and Culture
- Education and Knowledge Creation
- Information Technology
- Manufacturing
- Community Support Services
- Agriculture and Mining
- Transportation
- Business Support Services
- Wholesale Goods
- Retail Services
- Food and Entertainment

Once the employment data was broken into the clusters, a location quotient was calculated for each cluster. Winter Park employment was compared to national employment, state regional and county employment by the same clusters. A location quotient is calculated by comparing the cluster's share of total local employment to the cluster's national, state and regional/county share. The location quotient will yield a value generally between 0 and 2, where the result of 1 demonstrates that the cluster has an average share of the local economy.

Once clusters have been identified, the next step is to analyze wage data and growth rates. Using the following three criteria, target industry clusters can be identified:

1. Location quotient greater than 1.00
2. Average wages above US average
3. Growth rate above national growth rate
4. Local assets that provide a competitive edge

Data Sources and Processing

The data used to develop location quotients originated from two sources: US Census Business Pattern data for 2006 and business locational data from InfoUSA for 2008.

US Census Business Pattern data was used to calculate the share of total employment for each NAICS class at the national, state CBSA and county levels of geography while InfoUSA data was used to develop these figures for the City of Winter Park. InfoUSA data was favored over Census data for developing Winter Park estimates because it facilitated selecting only businesses that are located within the City limits based on their street address. Census data is only available down to the zip code level of geography. Zip codes do not nest within municipal boundaries (i.e., a zip code can span multiple jurisdictions) and the use of the data to calculate totals for a City are thus invalid.

Census business pattern data was summarized for national, state, CBSA and county levels of geography. Raw data was downloaded from the US Census Bureau website and imported into a Microsoft Access database. NAICS code descriptions were appended to the raw data and tables were created to sum employees and business establishments for each 3 digit and each 5 digit NAICS code. Data from these tables was exported and merged into a single Excel spreadsheet that was used to calculate the location quotients.

Winter Park employee and business counts were added to the location quotients spreadsheet using a different process. Business location data was acquired from InfoUSA for 5,552 businesses with Winter Park zip codes. Business locations were mapped using ESRI ArcGIS software based on street address. 150 addresses could not be accurately mapped and were manually reviewed and corrected where possible. Businesses located outside of Winter Park were excluded by selecting and exporting only those locations that were geographically contained within the City limits. There were a total of 3,065 businesses located within the City. This data was imported into Microsoft Access; post processed in the same manner as the Census business pattern data and then added to the location quotients spreadsheet.

Slightly less than 5% (163 of 3280) of the businesses within Winter Park had no InfoUSA assigned NAICS codes. These businesses employ approximately 585 employees. This error should not significantly impact the conclusions that are drawn and must be accepted in any case as this data is the best data that is available for the intended purpose.

Additional documentation regarding the data sources are included in attached appendices.

Employee Location Quotients

CLUSTER	DESCRIPTION	EMPLOYEE LOCATION QUOTIENTS			
		CITY/NATION	CITY/STATE	CITY/CBSA	CITY/COUNTY
1	Real Estate/Development	1.75	1.49	1.32	1.57
2	Creative Services	1.11	1.34	1.00	0.87
3	Financial and Professional	1.21	0.71	1.47	1.44
4	Health Care	1.31	1.45	1.80	2.00
5	Arts and Culture	1.48	1.32	0.70	0.58
6	Edu/Knowledge Creation	1.89	3.24	3.30	3.00
7	Information Technologies	0.24	0.37	0.44	0.36
8	Manufacturing	0.09	0.22	0.21	0.22
9	Community Support Ser.	0.68	0.82	0.77	0.74
10	Agriculture and Mining	0.06	0.14	0.43	0.45
11	Transportation	0.53	0.63	0.61	0.61
12	Business Support Ser.	0.84	0.77	0.57	0.62
13	Wholesale Goods	0.46	0.55	0.48	0.50
14	Retail & Services	1.08	1.04	0.90	1.02
15	Food and Entertainment	0.93	0.87	0.58	0.50

RANK ORDER – GREATER THAN 1.0

1	Edu/Knowledge Creation	1.89	3.24	3.30	3.00
2	Real Estate/Development	1.75	1.49	1.32	1.57
3	Arts and Culture	1.48	1.32	0.70	0.58
4	Health Care	1.31	1.45	1.80	2.00
5	Financial and Professional	1.21	0.71	1.47	1.44
6	Creative Services	1.11	1.34	1.00	0.87
7	Retail & Services	1.08	1.04	0.90	1.02

Top Ten Employers

City of Winter Park Top 10 Employers

<u>Company Name</u>	<u>Employees</u>
Hubbard Group, Inc.	1,100
Florida Winter Park Memorial	1,000
Mercantile Bank	664
Rollins College	618
World Publications, LLC	600
US Security Associates, Inc.	480
Albertsons	387
Publix Super Market	300
Winter Park Towers	250
Mayflower Retirement Community	250

Source: InfoUSA 2008

Economic Development Advisory Board



meeting date 2-16-16

approved by

item type ☐ Administrative
☐ Action
☒ Information

☐ City Manager
☐ City Attorney
☐ N/A

**agenda
item**

Subject 3a

Library update

[motion](#) | [recommendation](#)

Background

Shawn Shaffer, Executive Director and Jody Lazar, Community Librarian from the Winter Park Public Library have requested to speak with EDAB regarding the latest updates with the Library discussion.

Economic Development Advisory Board



meeting date 2-16-16

approved by

item type ☐ Administrative
☐ Action
☒ Information

☐ City Manager
☐ City Attorney
☐ N/A

**agenda
item**

Subject 3b

Comprehensive Plan - Economic Development Element

motion | recommendation

Background

At the December 15, 2015 EDAB meeting, the board discussed with staff the potential for inclusion of an economic development element into the Comprehensive Plan. The discussion was timely, in that staff is beginning the process of updating the Plan. Although this type of element is not required, its inclusion does provide for a rational basis for local land use decisions and a significant commitment level by the city for certain objectives and policies.

For discussion purposes, included in this agenda item are several segments of Economic Development Elements from around the state. Additionally, provided below are two examples where items in an Economic Development Element may be inserted into other mandatory elements of the plan.

PLAN OBJECTIVE/POLICY	CITY	ELEMENT
OBJECTIVE 4.3: The City shall recognize the significant role leisure provision plays in the economic prosperity of the community	City of Fort Lauderdale, FL	Parks & Recreation
OBJECTIVE 1.38: ECONOMIC DEVELOPMENT Support a competitive and diversified economy. POLICY 1.38.1: The City will participate in public and private efforts to identify and implement the best ways to retain and strengthen the existing job base as well as to expand job and training opportunities in the City so as to support a competitive and diversified economy.	City of Fort Lauderdale, FL	Future Land Use

FORT WALTON BEACH COMPREHENSIVE PLAN

OBJECTIVE I.3.3 - Economic Development Representative/Agencies

The City of Fort Walton Beach will designate an Economic Development Representative/Agency. The representative will serve as the lead agency for implementing this Element and the coordination of City economic development activities and initiatives.

Policy 1: The City will develop and annually update the five-year economic development strategic plan to attract appropriate business and industry. The plan will be coordinated with the Land Development Code and the Comprehensive Plan.

Policy 2: The City will continue to maintain the following with the resources available:

1. An updated inventory of targeted infill development sites.
2. A record of available electricity, water, sewer, and natural gas capacity and its per unit cost.
3. An inventory of Fort Walton Beach labor force characteristics.
4. Demographic and statistical Fort Walton Beach data to distribute promotional information.

Policy 3: The designated economic development representative will be responsible for coordination of visits by prospective business and industry representatives and serve as the liaison with governmental agencies.

Policy 4: The City encourages the use of innovative methods of financing for infrastructure and services, wherever possible, to minimize increases in the current and future tax burden.

Policy 5: The City continues to initiate efforts and support the efforts of other agencies to obtain grant monies and other funds designed to assist local economic development initiatives to increase employment opportunities.

Policy 6: The City, through its partnership with the Okaloosa Economic Development Corporation, will encourage advertising, promotional activities, and other sales and marketing techniques to attract new technology-based business to the commerce and technology park.

Policy 7: The City utilizes its various departments for internship opportunities, school visits, and presentations to educate students on the role of government in the local economy.

Policy 8: The City, through its partnership with the Okaloosa Economic Development Corporation and Greater Fort Walton Beach Chamber of Commerce, encourages job creation, diversified economic growth, and increased employment.

Policy 9: The City, through its partnership with the Small Business Association and the Greater Fort Walton Beach Chamber of Commerce, will pursue a regulated pushcart vendor program which will offer local produce, fresh cut flora, and locally-made commerce at The Brooks Street Landing to encourage entrepreneurs and foster a unique, vibrant waterfront village by 2014.

Policy 10: The City monitors the Future Land Use Element of the Comprehensive Plan to ensure that appropriate quantities of land are available to support actual/projected commercial/industrial growth.

Comprehensive Plan

City of New Smyrna Beach, Florida

IV. GOALS, OBJECTIVES AND POLICIES

GOAL: PROMOTE AND MAINTAIN ORDERLY AND DIVERSIFIED ECONOMIC GROWTH, INCREASED EMPLOYMENT, AND INVESTMENT OPPORTUNITIES, ENHANCE AND PROMOTE RELATIONSHIPS WITH THE BUSINESS COMMUNITY AND STAKEHOLDERS, WHILE PROTECTING QUALITY OF LIFE THROUGH ENVIRONMENTAL SUSTAINABILITY TO ENSURE COMPETITIVENESS IN TODAY'S ECONOMY.

OBJECTIVE

1. Image and Culture. Create and advance the image and culture of the City of New Smyrna Beach as a place where the private business sector, government and community come together as a prosperous and special place to do business, live, work, visit, invest and grow.

POLICIES

- a. Assess the current image of the City as perceived by visitors/tourists, business people and political leaders and activists, determine a core image to used on a common basis and develop an image that promotes a sustainable business friendly atmosphere that is safe and reliable for investment.
- b. Assess and address the existing culture of the city government, its departments, sub-agencies, advisory boards and other volunteers in order to ensure attitudes and behaviors that are customer friendly and deliver service with results in a timely fashion.
- c. Review, amend and update as necessary the governing documents of the city and its agencies to ensure support for responsible economic development.

OBJECTIVE

2. Organizational Development. Develop a responsible and responsive economic development organization to oversee and implement an approved plan, coordinate activities with volunteers and work cooperatively with development staff from the county and surrounding municipalities.

POLICY

- a. Create an economic development organization to implement the Economic Development Element, Economic Development Plan and develop other incentives to promote economic development.

OBJECTIVE

3. Streamline Processes. Create streamlined, transparent, and user-friendly government processes required to start-up, relocate or expand a business, including home-based businesses.

POLICIES

- a. Identify policies and procedures that unnecessarily impede and/or duplicate the permitting process. If needed, recommend changes to current policies and procedures required to start-up, relocate or expand a business, identify new policies and procedures to streamline the process, implement in order to create an open and transparent permitting process.
- b. Continue to monitor and identify new methods to enhance service and procedures, including but not limited to, administrative review and approval of certain development applications.

OBJECTIVE

Comprehensive Plan

City of New Smyrna Beach, Florida

4. Expand Tourism. Support efforts to expand tourism through venues and support systems.

POLICIES

- a. Stimulate the private development of short-term hotel accommodation space as well as convention services and facilities.
- b. Encourage the expansion of existing events and development of new events, which are compatible with the vision and mission of the city.

OBJECTIVE

- 5: Business Recruitment, Retention and Expansion. Create mechanisms, including incentives and workforce training, to attract, retain and expand diverse, innovative and responsible businesses to the City.

POLICIES

- a. Classify and characterize areas based on infrastructure, transportation links, geography, infill capability, sustainability and smart growth precepts.
- b. Revitalize the City's traditional downtown areas, building upon architectural, recreational and historical resources to attract residential, tourist-related and business development.
- c. Develop a list of targeted industries or specific business classifications that would be appropriate for the aforementioned areas, in order to develop incentive programs to attract those desired businesses.
- d. Capitalize on the city's resources, both natural and man made, to ensure the continued image as a safe and thriving community in which to raise a family, invest, do business and enjoy the quality of life.
- e. Encourage effective working partnerships between the public and private sectors, including educational institutions.
- f. Assure the conservation and enhancement of quality of life indicators, including cultural and natural assets.
- g. Promote appropriate business development around transportation hubs, including the airport, waterways and railroad corridor.

OBJECTIVE

- 6: Annexation. Create a plan for annexation of those geographical areas that are contiguous with or enclosed by current City boundaries in order to raise the tax base and provide a logical, contiguous land mass.

POLICIES

- a. Identify land for future annexation, prioritize areas for annexation, formulate a timeline for annexation and execute said timeline.
- b. Work with the Utilities commission to determine financial impact of annexation and infrastructure needs.

GOALS, OBJECTIVES, AND POLICIES

GOAL 8.1: THE CITY WILL SUPPORT AND PROMOTE BALANCED AND ORDERLY ECONOMIC DEVELOPMENT CONSISTENT WITH OTHER GOVERNMENTAL AGENCIES AND PRIVATE SECTOR PLANNING EFFORTS.

Objective 8.1.1: The City will designate staff to work with other agencies and businesses in the development of Economic Development strategies. Such strategies will be consistent with the economic goals of Federal agencies and Regional and State Comprehensive Plans.

Policy 8.1.1.1: The City will provide an inventory of commercial and industrially zoned lands. This information shall be used to produce a county-wide inventory.

Policy 8.1.1.2: The City should coordinate with St. Lucie County, the Economic Development Council of St. Lucie County and the Chamber of Commerce to develop strategies designed to meet the economic diversification needs of the community with emphasis on job creation.

Policy 8.1.1.3: The City should work with the Economic Development Council of St. Lucie County, which will act as the liaison to coordinate all state and federal incentive programs on behalf of companies locating or expanding in the City.

Policy 8.1.1.4: The City should initiate efforts and support the efforts of other agencies to obtain grant monies and other funds designed to assist local economic development initiatives to increase employment opportunities.

Policy 8.1.1.5: The City should continue regional economic development activities such as those of the Florida Research Coast.

Policy 8.1.1.6: The City should seek to coordinate, where appropriate, City investment in utilities, transportation, and other public facilities with business, employment, and other economic development opportunities.

GOAL 8.2: SUPPORT THE RETENTION AND GROWTH OF THE INDUSTRIAL SECTOR, RETAINING EXISTING BUSINESSES AND SMALL FIRMS, AND ACTIVELY SEEK TO ATTRACT NEW INDUSTRIAL BUSINESSES.

Objective 8.2.1: Provide supporting services for the retention of existing and attraction of new businesses.

Policy 8.2.1.1: The City should ensure the allocation of an appropriate quantity of lands that are desirable for commercial and industrial purposes to serve future growth needs of the City.

Policy 8.2.1.2: The City should prioritize the development of sites with high visibility and direct access to major transportation corridors for targeted industries and uses that encourage job creation.

Policy 8.2.1.3: The City should consider the high priority of retaining employment-generating land uses in appropriate locations during the review of comprehensive plan amendments and rezoning requests.

Policy 8.2.1.4: The City should encourage designation and preservation of industrial land for industrial uses.

Policy 8.2.1.5: The City should encourage new commercial and industrial development.

GOAL 8.3: THE CITY WILL DEVELOP AND MAINTAIN AN ECONOMIC ENVIRONMENT THAT WILL ENCOURAGE THE CREATION, EXPANSION, AND RETENTION, OF BUSINESS WITHIN CITY LIMITS WHILE MAINTAINING QUALITY OF LIFE FOR ITS RESIDENTS.

Objective 8.3.1: The City will provide and maintain appropriate data bases to assist in the analysis of trends and needs for economic development.

Policy 8.3.1.1: The City Planning & Zoning Department will evaluate and update land use demand data as part of the Evaluation and Appraisal Reports of the Comprehensive Plan every seven years to evaluate the effectiveness of the adopted Comprehensive Plan Goals, Objectives, and Policies regarding land use and economic development.

Policy 8.3.1.2: The City should foster a positive business climate by ensuring adequate public services, infrastructure, and high quality customer service.

Policy 8.3.1.3: The City will target the following industries:

Aerospace/Engineering	Manufacturing
Agriculture/Aquaculture/Food Processing	Medical Industries
Boats and Marine Related Manufacturing	Pharmaceutical
Business/Financial Services	Plastics Manufacturing
Electronic Related Industries	Professional Sports
Fabricated Metal Products	Research and Development
Film Industry	Tourism/Entertainment
Golf and Recreation	Transportation Hub Development
International Trade	(Multi-modal Distribution)

Policy 8.3.1.4: The City will support and promote the “Jobs Corridor” area along the west side of I-95 from the Crosstown Parkway Interchange to the county line on the south end in the vicinity of the Becker Road Interchange. The area will be recognized as an employment center.

Policy 8.3.1.5: The City should encourage the development of targeted industries that provide opportunities for long term growth. Criteria for identifying sectors to support include the following:

- Pay higher than average wage levels;
- Bring new capital into the economy, reflecting multiplier effects;
- Have reasonably good future job prospects;
- Involve a cluster of businesses engaged in similar activities;
- Use quality environmental practices; or
- Diversify the regional economic base.

Policy 8.3.1.6: The City should encourage the expansion of existing business and industry and/or development of new business and industry in appropriate locations, as feasible and applicable, in order to maximize the use of existing public services and infrastructure.

Policy 8.3.1.7: The City may consider potential changes to its Land Development Regulations to provide for a wide range of uses in commercial areas that contribute to the City's total employment base, provide the goods and services needed by the City's residents and promote the retention and expansion of businesses and attractions in the City's commercial areas.

Policy 8.3.1.8: In order to enhance current investments in the City and to maintain and improve existing structures, the City may consider allowing modifications to standards for required off-street parking, based on the anticipated use of the facility, size of meeting or assembly areas, hours of use, anticipated effects of parking on adjacent businesses and surrounding community, access to public transportation and carpools, and other considerations of need and impact.

Policy 8.3.1.9: The City may review and amend the Land Development Regulations to ensure it allows suitable home-based businesses that generate limited traffic.

Policy 8.3.1.10: Continue to support local business by giving preference to Port St. Lucie businesses in the City's bid process.

Policy 8.3.1.11: Continue to support New Business Training and other public outreach programs to support local business creation.

Policy 8.3.1.12: The City should continue to work with educational partners to ensure there are appropriate educational opportunities, job skills programs, and facilities to meet business and industry needs.

Objective 8.3.2: The City should continue to enhance local attractions and recreational facilities to promote tourism and quality of life.

Policy 8.3.2.1: The City should continue to promote tourism and recreation based upon the City's natural resources.

Policy 8.3.2.2: The City should continue to promote passive recreational activities by continuing to protect natural preserves and the North Fork of the St. Lucie River.

Policy 8.3.2.3: The City should continue to coordinate with the St. Lucie County Tourism office to promote tourism in the City.

Policy 8.3.2.4: The City should continue to support arts and culture as a core component to the economic health of the City.

Policy 8.3.2.5: All new development shall continue to provide public art, or pay fees in lieu of for the Port St. Lucie community.

Economic Development Advisory Board



meeting date 2-16-16

approved by

item type ☒ Administrative
☐ Action
☐ Information

☐ City Manager
☐ City Attorney
☐ N/A

**agenda
item**

Subject 3c

City updates

motion | recommendation

Background

The following agenda item encompasses updates on several city projects including:

2015 Development Report: A recap of the commercial or major multi-family development projects that were completed in 2015, are now underway in 2015, or in the planning stage for 2016. This report was presented to the City Commission on January 11, 2016.

Visioning: Vision themes are now online and available for review at www.visionwinterpark.org. The Steering Committee is coordinating with focus groups and neighborhoods to gauge the effectiveness of these themes which ultimately will lay the groundwork for a final vision.

Denning Drive: CRA staff continues to evaluate the potential for reallocating right-of-way on Denning Drive for a more 'complete streets' model. Staff will present their findings to the CRA Agency on February 22nd.

Progress Point: The City Commission discussed the P&Z/EDAB joint meeting outcomes at the February 8, 2016 meeting. Staff will provide an oral recap.



2015 YEAR END REVIEW

Below is a recap of the commercial or major multi-family development projects that were completed in 2015 or are now under underway in 2015 or in the planning stage for 2016:

Completed in 2015:

Apartments at Winter Park Village (Paseo): The 204 unit apartment project at the former DMV property at 940 W. Canton Avenue, began construction in November 2013 and was completed in May 2015. The project is currently almost completely leased.

Ravaudage: Construction is completed on the 18,000 square foot building next to the Ale House that holds a Tony Roma's (TR's Firegrill) restaurant and a Zona Fresca restaurant location. A hair salon and some office space will fill out the building.

Jewett Clinic: Construction began in October, 2014 on a two-story, 25,000 sq. ft. medical building in conjunction with the Jewett Clinic at 1245 Orange Avenue and was completed in October 2015. The six new operating rooms have been fully booked since opening.

Lombardi's Seafood: The new Lombardi's Seafood retail store with café at 1888 West Fairbanks Avenue to replace the existing location opened in June 2015. No word on the plans for redevelopment of the old Lombardi's site, which the family sold.

Kid's Care: The first pediatric Centra Care facility in Central Florida called "Kid's Care" at 2325 West Fairbanks (former site of a Chevron station) adjacent to the on-ramp to I-4 was completed and opened in June, 2015.

Blake's Corner: The building at 900 S. Orlando Avenue (SE corner of Minnesota) was completed in December 2015. The Subway store that was next to Taco Bell has moved down to this new location. A hair salon will be taking another tenant space. The major corner space is to be a 150 seat, Square One Burgers restaurant.

Starbucks/Verizon: The new Starbucks opened at the former Jiffy Lube location at 2519 Aloma Avenue and their former location at 1900 Aloma Avenue has become a Verizon store that opened in November. Phone stores such as Verizon are one of the few businesses with sales per square foot that outpace a Starbucks.

Thomas Lumber: The redevelopment of the former Thomas Lumber building at 784 N. Orange Avenue (The Lumber Yard) is almost complete as it transitions to interior design studios and salons.

Park Avenue Transitions: Several stores and restaurants have transitioned in 2015 along Park Avenue but notable is the new LuLu Lemon store. Top 3 in sales per square foot across the nation: #1 Apple stores; #2 Tiffany stores and #3 Lululemon stores.

Approved and Under Construction in 2015:

Whole Foods project: Redevelopment of the 11 acre former Corporate Square/WP Dodge properties for a Whole Foods grocery has begun. Whole Foods together with another major retailer, possibly a Nordstrom Rack, will total 77,000 square feet of retail store space. In addition, there are three out-parcels. One out-parcel will be a new PNC Bank site, which has also been issued their building permit. Permits have been issued for the site development work for the shopping center, the building permit for the 'shell' of the Whole Foods building and for the construction of the Lee Road extension, as FDOT has also approved the modification of the Lee Road/Orlando Avenue intersection.

Lakeside Crossing: The redevelopment proposed for the former Mt. Vernon Inn at 110 S. Orlando Avenue has begun. Building permits have been issued for the site development work and for the building shells. The permit for the parking garage is now in plan review. The project is to consist of 37,473 square feet of retail and restaurant space. The restaurants are to include a "Chuy's", which has several locations in Central Florida, which is Tex-Mex fare; a restaurant concept from Miami called "Bulla's" which is a Spanish-Tapas menu and "Kona Grille" which has another location in Sarasota and this will be first Orlando location.

State Auto Body: The former State Auto Body building at 1280 N. Orange Avenue is also under renovation into retail space and possibly a small on-site brew pub. The size of the building remains the same and a new parking lot will be constructed in the rear.

Canton/Capen Homes: Twelve new single family homes are to be built on the now vacant land at the NW corner of Canton and Capen Avenues by David Weekly Homes. The City has approved the permit for the site development work for the alleys and other infrastructure which are now under construction. Upon completion David Weekly will then start on the new homes.

900/912/952 W. Fairbanks Avenue: Phil Kean is renovating these three properties including the former Café 906, Sadler's Tailoring and the adjacent building into his business offices.

Coming in 2016: There are several new projects in the works for 2016:

Downtown Residential/Townhouses: Eight new 3-story townhouse units of 28,924 total square feet at 401/421 W. Morse Blvd. (NW corner of Virginia Avenue) by Phil Kean were approved by the City Commission in October 2014. That project now has been issued building permits and site work has begun.

Six new townhouse units within a three story building totaling 20,542 square feet with underground parking is in construction plan development at 125 S. Interlachen (former Ye Olde Bric Condo) which was approved by the City Commission on February 2015. Building permits ready to be issued for construction to start in 2016.

Ten additional new 2-3 story townhouse units totaling 40,566 square feet by Phil Kean are expected sometime in 2016 at 652 W. Morse Blvd (former DeCiccio law firm next to the Coop). The land sale has been completed and the project is in the construction plan development phase.

Three new units were approved at 170 E. Morse in July, 2015 that would demolish the existing two story commercial building at the SW corner of Morse/ Knowles and replace it with a three story townhouse building of approximately 19,000 square feet in total size. However, that land sale has not been completed, so the status and timing of this project is not known at this time.

Another ten new 3-story townhouse units totaling 44,200 square feet in size were granted zoning approval in November, 2015 by the City Commission at 633 & 651 N. Park Avenue across from the Park Aire Condos. The existing Spanish Oaks and Golfview Apartments would be demolished for this project. Timing of that project is unknown.

300 N. Pennsylvania: A new 2-story concierge medical building of 6,535 square feet for Dr. Castro has been issued a building permit and is expected to start in January 2016.

Sun Trust Drive-in: Permits have been issued for the new Sun Trust drive-thru teller building at 295 S. New York (corner of New England Ave.) to replace their existing bank tellers on Carolina Avenue.

Reflections Dermatology: The former Don Palladino building at 440 W. Morse Blvd. has been sold and will be razed for the construction of a new two story, 3,695 square foot dermatology practice in 2016.

Lee Road Townhouses: In July 2015, the City Commission approved a new project for the redevelopment of the 1800 Lee Road parcels. The property formerly consisted of eight duplex buildings which have been removed and the property is to be redeveloped into 30, two-story townhomes. Construction expected in mid-2016.

Fifth Third Bank: In May, 2015 the City granted the zoning approvals for a 3,872 square foot branch bank and 5,410 square feet of other office space at the vacant NW corner of Lakemont & Aloma was approved. The City has not yet received building permit plans for this project.

Lee Road Medical Office: Building permit for a 9,000 square foot expansion to the medical office at 1691 Lee Road is ready to be issued. Construction expected in 2016.

Center for Reproductive Medicine: The former St. John Lutheran parking lot at 1500 S. Orlando Avenue has been sold and the expectation is for construction of a new two story 15,000 square foot medical building on that site in 2016.

K-Mart Shopping Center: On December 14th the City Commission gave the initial approval for the renovation of the former K-Mart shopping center at 501 N. Orlando Avenue. All the buildings will be (in phases) renovated with new facades and the parking lot upgraded with enhanced landscaping and lighting as well as new signage. Most major tenants are remaining such as Michael's, Office Depot, L.A. Fitness, etc. New prospective tenants include a Home Goods and Ross store. Also there will be several new restaurants including a Too Jay's and Blaze Pizza.

Winter Park Hospital: The City expects the Winter Park Hospital to start on a major renovation and expansion to the Emergency Services Dept. in 2016. Following completion of that project, the next major undertaking for the Winter Park Hospital is the construction of a new five story Patient Tower/Wing on the east side of the Hospital building.

For more information on these or other projects, please contact Jeff Briggs, Planning Manager at jbriggs@cityofwinterpark.org or at (407) 599-3440.