

SOUTHEAST FLORIDA REGIONAL VISION AND BLUEPRINT FOR ECONOMIC PROSPERITY

ACTION PLAN #1 TASKS 1-2

THIS ACTION PLAN #1 dated this _____ day of _____, 2012, supplements and is considered by all parties to be part of the approach for the creation of the Southeast Florida Regional Vision and Blueprint for Economic Prosperity. This document identifies and describes the specific tasks outlined in the Consultant Agreement in greater detail, identifies the roles of different members and the deliverables from each task, and the financial budgets for each task. Some tasks will be performed by paid consultants and some tasks will be provided through ‘in-kind’ services provided by Partnership members.

Participants in this action plan include, but are not limited to:
The “Client” that consists of:

The South Florida Regional Planning Council,
3440 Hollywood Boulevard, Suite 140, Hollywood, Florida 33021, and

The Treasure Coast Regional Planning Council,
421 SW Camden Avenue, Stuart, FL 34994

The “Consultant” or “Consultant Team” or “the Dover, Kohl & Partners team” that consists of:

Dover, Kohl & Partners,
1571 Sunset Drive, Coral Gables, FL 33143

Duany, Plater-Zyberk & Company
1023 S.W. 25th Avenue, Miami, FL 33135

Criterion Planners
725 NW Flanders St. Suite 303, Portland, OR 97209-3539

Cardno ENTRIX
3460 Fairlane Farms Road, Suite 8, Wellington, FL 33414

HDR, Inc.
2202 N Westshore Drive, Suite 250, Tampa, FL 33607-5711

Rutgers Center for Urban Policy Research (CUPR)
33 Livingston Ave., Suite 400, New Brunswick, NJ 08901

Strategic Economics
2991 Shattuck Avenue, #203, Berkeley, CA 94705

Emerge Consulting Corporation, Clarence Anthony
1665 Palm Beach Lakes Blvd Suite 520, West Palm Beach, Florida 33401

Spikowski Planning Associates
1617 Hendry St., Suite 416, Ft. Myers, FL 33901

Gorman & Company, Inc.
200 N. Main Street, Oregon, WI 53575

The “Consortium Members” and the “Partnership” (Southeast Florida Regional Partnership). The members within the Southeast Florida Regional Partnership are described in conjunction with each task.

PHASE 1A: DEVELOPMENT OF REGIONAL PROFILE

TASK 1: BUILD COLLABORATIVE PARTNERSHIPS

Scope of Work:

This activity will focus on building partnerships through a fully functional, effective organizational structure that is intended to continue beyond the visioning process. The work will be performed by the client and Southeast Florida Regional Partnership members.

The Subtasks for this task involve working with Partnership members to accomplish the following.

Task 1.1 Continue Developing Regional Partnership

- Identify and meet with additional public, private, philanthropic and non-profit partners to engage them in the Partnership
- Identify and meet with key media partners to educate and disseminate information about the Partnership and its activities
- Develop membership / information package that can be used by Partnership members
- Develop funding proposals to support and augment Partnership activities
- Identify opportunities to link Partnership members directly to capacity building and grant resources and support their efforts

Task 1.2 Identify Opportunities to Enhance Collaboration

- Review existing public, private and nonprofit planning processes and activities to identify opportunities to enhance collaboration, reduce fragmentation, and improve integration of, and leverage, activities and resources
- Develop Partnership website with tools to enhance independent communication and collaboration between Partnership members
- Identify opportunities for meaningful participation in discussions and decision making for stakeholders with particular attention to populations traditionally marginalized in public planning processes
- Identify lessons learned from prior regional initiatives – factors that have encouraged collaboration, as well as potential barriers to collaboration

Task 1.3 Regional, State, and National Coordination

- Coordinate, to the extent possible, with other statewide regional visioning and planning processes including other Sustainable Community Planning Grant recipients
- Work with local, state, and national professional associations to identify opportunities to share information and coordinate activities
- In coordination with Task 2.10, explore opportunities to link local and regional indicators, benchmarks and performance measure to larger state and national frameworks such as the Florida Chamber's and local 6 Pillars initiatives, Comprehensive Economic Development Strategy update

efforts, and National Open Indicator Consortium efforts (WEAVE) in coordination with local partners who develop and manage data on key issues

Task 1.4 Strategies for Regional Collaboration

- Identify technology solutions to geographic impediments that hamper regional collaborative efforts
- In coordination with “Task 4. Enhance Regional Leadership and Technical Capacity,” identify communities / populations requiring specialized outreach

Task 1.5 Expand Participation

- Form and recruit leadership for Partnership committees and work groups with early priority on economic development and equitable outcomes.

PRESENTATIONS / MEETINGS:

Regular reports to Executive Committee and work groups as appropriate.

DELIVERABLE:

Updates in required reports to HUD and summary analysis and recommendations in final Regional Vision and Blueprint plan.

RESOURCES:

| | |
|---------------|---|
| \$ 255,000.00 | Client |
| \$ 0.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 255,000.00 | Total for this task |

Client for this task will include:

- South Florida Regional Planning Council
- Treasure Coast Regional Planning Council

Outside Experts may include, but not be limited to:

- Other Consortium Members as designated by the Client

TASK 2: REGIONAL RESOURCE LIBRARY & SCORECARD

Scope of Work:

In Task 2, the Dover, Kohl & Partners team will work with the Client to: a) create a set of indicators that will help the Partnership measure regional prospects; b) model , measure , and characterize existing conditions in the region; and c) model and measure a trend scenario of what the region could become in 2060 if current policies are followed.

The Task 2 items are listed below, and are further described in detail in the pages that follow:

- Task 2.1 National Research
- Task 2.2 Survey and Integrate Regional Values
- Task 2.3 Data Warehouse
- Task 2.4 Demographic Forecasts

- Task 2.5 Regional Housing Assessment
- Task 2.6 Virtual Present
- Task 2.7 Existing Conditions Analysis and Modeling
- Task 2.8 Trend Future
- Task 2.9 Model Trend
- Task 2.10 Develop Range of Regional Indicators for Scorecard
- Task 2.11 Select Indicators for Scorecard and Review with Executive Committee
- Task 2.12 Integrate Scorecard Indicators into Modeling Efforts
- Task 2.13 Ongoing Monitoring Program

Task 2.1 National Research

The Dover, Kohl & Partners team will identify best practices for the use of benchmarks and indicators in regional visioning and planning. The team will research and review benchmarks and indicators used in other regions of Florida and statewide, and noteworthy regional visioning efforts in other states, to identify promising models for the Southeast Florida Regional Vision & Blueprint and document them in a report. This review will specifically include the following:

- Florida Scorecard (Florida Chamber Foundation)
- Jacksonville’s Community Indicators Project (Jacksonville Community Council)
- Regional Sustainability Indicators (Sustainable Seattle)
- Others recommended by the Client or the Partnership for Sustainable Communities (HUD-DOT-EPA)

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team’s findings on this task to the Client and the Partnership. This presentation may occur in conjunction with presentations and meetings regarding other tasks. Each task will be addressed at a minimum by the Executive Committee, at least one Work Group, and Partnership Meeting.

DELIVERABLE:

The Dover, Kohl & Partners team will deliver a report that summarizes its analysis of benchmarks and indicators in regional planning and identifies promising models for Southeast Florida.

RESOURCES:

| | |
|--------------|---|
| \$ 4,000.00 | Client |
| \$ 19,975.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 23,975.00 | Total for this task |

Consultant Team for this task will include:

- Dover, Kohl & Partners (Project Leader and Task Leader)
- Duany, Plater-Zyberk & Company (Supporting Role)

- Criterion (Supporting Role)
- Cardno ENTRIX (Reviewer)
- Spikowski Planning Associates (Supporting Role)

Task 2.2 Survey and Integrate Regional Values (Regional Values & Indicators)

In partnership with the Client, the Dover, Kohl & Partners team will review and summarize regional values based on the Survey to be conducted as part of Task 2.1. The team will interpret Survey results into a set of Indicators that assesses the region's success at meeting regional values. This task will be informed by and coordinated with tasks 2.10, 2.11 and 2.12.

This task will involve the study of information sets for each sub-jurisdiction: transportation and other infrastructure measures, equity and affordable housing measures, economic competitiveness, existing community revitalization efforts/measures, intergovernmental efficiency/coordination, community uniqueness and livability. This task will include the review and incorporation of previous planning efforts like Southeast Florida 2060, the State Workforce Investment Plan, Eastward Ho! Development Futures: Paths to More Efficient Growth in Southeast Florida, reports from the Florida Chamber of Commerce, and other relevant regional plans.

The formulation of project indicators will also consider the following:

I. Transportation and Other Infrastructure

- A. Vehicle Miles Traveled VMT/Trips by Auto
- B. VMT/Trips by Bike/Pedestrian Means
- C. State and County/Local Road Lane Miles

II. Equity – Affordable Housing Measures

- A. Affordable Housing Supply/Demand Ratios
 - B. Average Percent of Income Spent on Housing
 - C. Percent Living in Deteriorated or Overcrowded Housing
- (Note: These measures may be modified once HUD provides guidelines regarding Affordable Housing Measures).*

III. Economic Competitiveness

- A. Population in More/Less Developed Areas of County (by jurisdiction)
- B. Employment in More/Less Developed Areas of County (by jurisdiction)
- C. Income in More/Less Developed Areas of County (by jurisdiction)

IV. Existing Community Revitalization Efforts/Measures

- A. Residential Valuation in More/Less Developed Areas of County (by jurisdiction)
- B. Nonresidential Valuation in More/Less Developed Areas of County (by jurisdiction)

V. Intergovernmental Efficiency/Coordination

- A. Number of County Employees (by jurisdiction) in Planning/Land Use
- B. Number of Local Employees (by jurisdiction) in Planning/Land Use

VI. Community Uniqueness and Livability

- A. Lane Miles of Road (by jurisdiction)
- B. Vacant Land (by jurisdiction)
- C. Agricultural/Environmentally Fragile Land (by jurisdiction)

VII. Existing Software Indicators*

- A. INDEX indicators.
- B. State of Florida Transportation Model network indicators.

* *INDEX and State of Florida Transportation Model network indicators will be available as permitted by software calculations.*

The Client/ Consultant Team will create a comprehensive set of indicators that will measure regional values as well as HUD sustainability goals, using the taxonomy of the data warehouse, the research results of Task 2.1, and INDEX's or other appropriate current indicators.

The Client with the assistance of the Consultant will produce a Scorecard Indicators Report. The indicators in the report will address a comprehensive array of regional values, environmental measures, equity issues, and transportation issues applicable on both the regional and local level. This will involve the development of Twenty Indicators that will be directed to evaluating Ten Vision Elements. The Ten Vision Elements will be the following (or closely related): Economic Development, Housing, Transportation, Water, Environment, Climate Resiliency, Community Assets and Culture, Education, Healthy Communities, and Inclusive Regional Leadership. The Twenty Indicators assigned to the Ten Elements are as follows (or closely related):

- Economic Development (property value, nonresidential value and mixed-use development added)
- Housing (housing (affordable or otherwise) demand/supply ratio, average percent of income spent on housing)
- Transportation (Vehicle Miles Traveled (VMT) by auto, VMT reduction accompanied by transit, bike, pedestrian modes)
- Water (water and sewer utilities added)
- Environment (VMT contributing to air pollution, paved surfaces contributing to runoff/water pollution)
- Climate Resiliency (land lost to development, agricultural/environmentally fragile land lost to development)
- Community Assets and Culture (quality of life rating, fiscal impacts of public services)
- Education (tax dollars spent in urban school districts, property value added within urban school districts)
- Healthy Communities (percent of work trips that are bike/pedestrian; change in air/water pollution ratings)
- Inclusive Regional Leadership (planning jobs in land use, cumulative differences of Plan/Trend analyses)

The Consultant in coordination with the Client will integrate Scorecard Indicators into modeling efforts by using those INDEX and State of Florida Transportation Model network indicators that are responsive to the criteria developed above.

Task 2.2 Subtasks:

Task 2.2-a: The Dover, Kohl & Partners team will review previous regional planning efforts for Southeast Florida to identify key regional values.

Task 2.2.b: The team will identify information sets from credible sources that could be used over time to measure progress toward new regional goals in the issue areas established for the Southeast Florida Regional Vision & Blueprint (economic development, housing, transportation, water, environment, climate resiliency, community assets and culture, health, education, and inclusive regional leadership). Rutgers University will be responsible for numerous variables at the TAZ level and above and will provide full support to Criterion Associates to ensure that all data needs of the Client are fulfilled.

Task 2.2-c: Based on these analyses, the team will suggest indicators that could be used to quantify baseline conditions in the region, assess alternate futures, and later be monitored over time to measure progress toward Southeast Florida Regional Vision & Blueprint benchmarks or goals. The team will present these indicators to the regional planning councils to obtain feedback and additional suggestions

Task 2.2-d: The team will then produce a report that identifies initial recommendations for indicators.

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team’s findings on this task to the Client and Partnership. This presentation may occur in conjunction with presentations and meetings regarding other tasks. Each task will be addressed at a minimum by the Executive Committee, at least one Work Group, and Partnership Meeting.

DELIVERABLE:

The Dover, Kohl & Partners team will deliver a report that identifies initial recommendations for indicators. From Task 2.2-e the deliverables will be the variables not included in the current INDEX Software but necessary to ensure that the Client’s request for a broad assessment is answered. From Task 2.2-g the deliverables will be additional variables and their results for TREND Future that have surfaced during the course of the modeling.

RESOURCES:

| | |
|--------------|---|
| \$0.00 | Client |
| \$ 39,950.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 39,950.00 | Total for this task |

Consultant Team for this task will include:

- Dover, Kohl & Partners (Project Leader, Task Leader)
- Spikowski Planning Associates (Supporting Role)
- Duany, Plater-Zyberk & Company (Supporting Role)
- Criterion (Supporting Role)
- HDR, Inc (Supporting Role)
- Bob Burchell, Rutgers University (Supporting Role)
- Cardno ENTRIX (Supporting Role)
- Emerge Consulting, Clarence Anthony (Reviewer)

Task 2.3 Data Warehouse

In partnership with the Client, the Dover, Kohl & Partners team will build a Regional Digital Data Warehouse using readily available and relevant data. Local governments will be contacted to provide updated information in an agreed-upon format. The Client/Consultant Team will also identify data gaps that should be addressed in future assessments. The project website will provide links to the Regional Digital Data Warehouse. The Regional Digital Data Warehouse will contain the base information upon which trend models are extrapolated and scenario models are projected. The warehouse will also include documents, reports, and data presentations relevant to project tasks, and links to additional data resources maintained by other organizations. The Consultant will update an on-line, searchable repository of regional background information (exclusive of modeled cases and scenarios that may be posted elsewhere on the project website).

The Regional Digital Data Warehouse will include information on demographics, land-use, housing, employment, transportation, infrastructure, recreation, natural environment, and climate change organized into the following categories from the regional vision scope:

- Economic development
- Housing
- Transportation

- Water
- Environment
- Climate Resiliency
- Community assets and culture
- Education
- Healthy communities
- Regional organizations

The Regional Digital Data Warehouse will become the project platform on which INDEX, the Consultant's modeling software, operates in subsequent tasks. Hosting of the warehouse will be the responsibility of the Client. Updating of the warehouse will be the responsibility of the Consultant up five times during the project.

Task 2.3 Subtasks:

- 2.3-a Develop warehouse structure and data schema; identify initial documents and presentations; and identify primary links.
- 2.3-b Prepare warehouse user interface and content management system.
- 2.3-c Obtain client approval of components.
- 2.3-d Assemble data for existing conditions and trend cases from RPCs, counties, cities, and state and federal agencies.
- 2.3-e Establish warehouse web links to other databases.
- 2.3-f Install warehouse system on client-provided server and launch service.
- 2.3-g Maintain and update warehouse contents and links over course of the project.
- 2.3-h Coordinate transfer or archiving of warehouse at project conclusion.

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team’s findings on this task to the Client and Partnership. This presentation may occur in conjunction with presentations and meetings regarding other tasks. Each task will be addressed at a minimum by the Executive Committee, at least one Work Group, and a Partnership Meeting.

DELIVERABLE:

The deliverables for this task are the direct actions described in the Task 2.3 subtasks above.

RESOURCES:

| | |
|---------------|---|
| \$ 0.00 | Client |
| \$ 79,900.00 | Consultant Team |
| \$ 63,750.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 143,650.00 | Total for this task |

Consultant Team for this task will include:

- Dover, Kohl & Partners (Supporting Role, Project Leader)
- Criterion (Task Leader)
- Duany, Plater-Zyberk & Company (Supporting Role)
- Cardno ENTRIX (Supporting Role)

Outside Experts will include, but not be limited to:

- FAU / Leonard Berry (Supporting Role)
- Climate Compact (Supporting Role)

Task 2.4 Demographic Forecast

The 2060 demographic forecast will be developed by the Client with the Consultant in an assistance role. The demographic forecast will be a single Control Forecast of 2060 population and employment variables

whose numbers indicate Trend condition, and will be suitable for disaggregation to the county and 1,078 TAZs. This will involve all seven counties.

The above task involves a demographic forecast that sets the numerical boundaries for the TREND Future. It involves active participation on the part of the consulting team to structure projections at the TAZ level so that they are representative of the best assessment of future conditions that the RPC can specify. At the local (municipal) level these will also be the control numbers for the TREND Scenario.

Subtasks for 2.4 Demographic Forecasts

- 2.4.1 **RPC Efforts:** The RPC will oversee the demographic projections to the TAZ level. Rutgers University will undertake the Demographic Forecasts that the RPC will oversee. This will be from 2010 to 2040, extrapolated to 2060. The forecast will involve a composite of projections. These projections will acknowledge other projections but only to the degree that both the effect of the recession and the 2010 Census are included in these projections. Projections undertaken before the recession or not having 2010 as the base year of that projection will be used for advisory purposes only.
- 2.4.2 **Rutgers University Efforts:** Rutgers University will provide scale based control numbers for the entire region and for the seven counties for population, households, and employment. Municipal and TAZ information will also be supplied but as the date for each subset varies, data will vary by scenario. Information will be provided for population by race and ethnicity (Hispanic), population by age, employment by type, total personal income, total retail sales, and total earnings. These numbers will also be projected from 2010 to 2040 and extrapolated to 2060. The base year will be 2010. For municipalities, as much of the above information will be provided as is available from Census, BEBR, and other sources. The basis for the controls for TREND will be BEBR-type projections. TREND and alternative scenarios will be the same at the Regional level; they may differ at the county, TAZ, and municipal level. . In preparing the forecast, Rutgers will also utilize the results of Task 2.5 regarding housing.
- 2.4.3 **Dover-Kohl Efforts:** Dover-Kohl will review information and provide recommendations on formatting and storage issues. Dover-Kohl will also locally research any information available and provide values for the smallest of municipalities of the region. Dover-Kohl's task will consist of providing original information as well as confirming review of information provided by Rutgers University.

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team's findings on this task to the Partnership. This presentation may occur in conjunction with presentations and meetings regarding other tasks. Each task will be addressed at a minimum by the Executive Committee, at least one Work Group, and a Partnership Meeting.

DELIVERABLE:

Deliverables will be a demographic projection to 2040 and extrapolation to 2060 of the variables reported above. Detailed information will be available for the entire region (7 counties) as well as its parts: Keys (Monroe), Everglades, Gold Coast (Miami-Dade, Broward), and Treasure Coast (Palm Beach, Martin, St. Lucie, and Indian River). Projections will also be available for all municipalities in the region.

RESOURCES:

| | |
|-----------------|---|
| \$ 36,335.00.00 | Client |
| \$ 19,975.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 56,310.00 | Total for this task |

Client for this task will include:

- South Florida Regional Planning Council

- Treasure Coast Regional Planning Council
- Consultant Team for this task will include:*
- Dover, Kohl & Partners (Supporting Role, Project Leader)
 - Bob Burchell, Rutgers University (Task Leader)
 - Criterion (Supporting Role)
 - Cardno ENTRIX (Supporting Role)

Task 2.5 Regional Housing Assessment

Please note that the scope and approach to the Regional Housing Assessment and its component parts may be amended to reflect guidelines and recommendations currently under development by HUD, and input from the Partnership and other key regional stakeholders and advisors to the Partnership.

The Client/ Consultant Team will assemble existing housing assessments in the region, undertake a ‘gap’ analysis regarding regional housing goals regarding fair housing and social equity, and identify partners, implementing entities, resources and timelines for goal achievement.

The Client/ Consultant Team will also analyze data and actions and recommend policies related to housing regionally with a focus on planning related issues such as housing supply and demand; existing and projected housing types, location and mix, fair housing opportunities; as well as market and economic-related issues resulting from Florida’s current foreclosure situation and its ramifications. The coordinated assessment of these elements is geared towards supporting community and economic development and expanding connectivity to regional assets such as transportation systems, employment centers, educational and workforce development resources, and healthcare opportunities for the region’s existing and future residents. The assessment will be a key input to the Task 2.4 demographic forecast, and its preparation will be coordinated with Rutgers Task 2.4 work.

Subtasks for 2.5 Regional Housing Assessment

Through this effort we will create a new integrated model of research that articulates key trends and indicators for the region and becomes a framework for more intensive examination on the local level. The scope of work encompasses three bodies of work that have been typically performed separately: Analysis of Impediments to Fair Housing, Equity Assessment, and a Housing Needs Assessment.

2.5.1 The Analysis of Impediments to Fair Housing will include:

- Current data on population and households based on local studies, US Census American Community Survey (ACS), projections on population and household characteristics, and other local, state, and federal data sources including HUD datasets
- A demographic snapshot that will identify the areas of racial and ethnic concentrations of poverty, document the degree of segregation, and describe likely future trends
- Identification and Assessment of Racial / Ethnic Segregation and Integration
- Identification and Assessment of Racially Concentrated Areas of Poverty
- Identification and Assessment of Access to existing areas of high opportunity particularly from “opportunity-poor” communities
- Identification and Assessment of Major Public Investments (current and future)

- Identification and Assessment of Fair Housing issues, services and activities
- Conclusions regarding finding from the identification and assessment phases and recommendations to be implemented through regional planning
- Major takeaways from stakeholder engagement related to the finding of the Fair Housing Equity Analysis
- Understanding of issues related to the expansion and preservation of affordable housing including zoning and community perception
- A review of private market policies and fair housing activities currently underway. This will include analysis of mortgage lending approvals, subprime mortgages (from HOM Mortgage Disclosure Act or HMDA data). Compliance with the Community Reinvestment Acts (CRA) will be detailed. Recent legal cases and fair housing complaints will be analyzed to detect potential discriminatory patterns. Local jurisdiction's current and previous fair housing activities through local Analyses of Impediments will be analyzed.
- Lessons learned

2.5.2 Equity Assessment. The Equity Assessment will illustrate opportunity-rich communities to understand what needs to be remedied in opportunity-poor communities. This will include an analysis of the access to opportunity neighborhoods with: Education Indicators, Economic Health Indicators, Neighborhood Quality Indicators, Transportation and Mobility Indicators, Health and Environmental Factors:

The Equity Assessment will:

- Measure social and economic disparities for low income communities
- Measure the degree of equitable investment in public infrastructure within communities including measuring accessibility to affordable transportation
- Measure how public investment is leveraged to attract private investment in low-income areas and resources for creating wealth and asset-building including access to financing
- Measure access to educational opportunities including the location of educational opportunities in low income communities
- Assess and recommend policies that promote equity (inclusionary zoning, infill and redevelopment strategies for environmentally contaminated areas).

Approach: Resident and stakeholder input will be gathered through key stakeholder interviews, online and mail survey of select Regional Housing Partners, community forums live and online. Regional partners that will assist in the development of the plan will include, but not be limited to:

- Affordable housing providers
- Community Development Block Grant jurisdictions;
- Economic development organizations
- Fair housing agencies
- Financial institutions and mortgage lenders

- Housing Advisory Committee creates as part of Southeast Florida’s regional vision and blueprint for economic prosperity.
- Non-profit organizations
- Public health agencies
- Public housing authorities
- Real estate professionals
- Schools and educational institutions and interests
- Southeast Florida Regional Partnership members
- Transportation organizations (MPOs, SFRTA etc.)

2.5.3 Housing and Livability Plan. The Housing and Livability Plan incorporates the Housing Needs Assessment. The home-building industry, which has historically played a vital role in Florida’s economy, is at a standstill: declining property values, an unprecedented number of foreclosures impacting private and public entities (residents, local governments, the financial (banks) system, and Florida’s judicial system), housing supply vastly exceeding demand, a potential excess in future entitlements, lack of funding, etc. are some of the issues currently affecting Florida’s economy. A Regional Assessment of these issues is necessary in order to define a path to regional recovery and growth.

The Housing and Livability Plan will include, but may not be limited to:

- Existing and projected population (quantity and location)
- Current and future land uses (to determine existing, projected and entitled units)
- Existing and projected housing types and housing mix
- Existing and proposed housing location and its proximity to transit, employment centers, educational resources, etc.
- Existing housing supply and demand by building type and income level
- Existing and projected housing relative to roadway networks and transportation systems
- “Pending” supply (i.e. foreclosures within the banking and judicial system) and an assessment of the policies and funding necessary to make these units available
- Understanding of housing cost burden in the region
- Understanding of the resources that are available to support the production of affordable housing and the opportunities to maximize and leverage resources

Approach: The South Florida and Treasure Coast Regional Planning Councils, working in conjunction with the region’s MPOs and local governments (as necessary), will conduct the above mentioned research and gather the information in a format that is suitable to conduct both the Virtual Present and Future Trend modeling scenarios contemplated in the RVB. This information will serve as a basis to create new goals and policies geared at re-establishing economic prosperity and job creation deriving from a balanced housing industry.

This integrated assessment will be a regional policy document which will further the key livability principles adopted by the Partnership in support of the Sustainable Communities Initiative.

- Provide more transportation choices: Develop safe, reliable and economical transportation choices to decrease household transportation costs, reduce our nation’s dependence on foreign oil, improve air quality, reduce greenhouse gas emissions and promote public health.
- Promote equitable, affordable housing: Expand location- and energy-efficient housing choices for people of all ages, incomes, races and ethnicities to increase mobility and lower the combined cost of housing and transportation.
- Enhance economic competitiveness: Improve economic competitiveness through reliable and timely access to employment centers, educational opportunities, services and other basic needs by workers as well as expanded business access to markets.
- Support existing communities: Target federal funding toward existing communities—through such strategies as transit-oriented, mixed-use development and land recycling—to increase community revitalization, improve the efficiency of public works investments, and safeguard rural landscapes.
- Coordinate policies and leverage investment: Align federal policies and funding to remove barriers to collaboration, leverage funding and increase the accountability and effectiveness of all levels of government to plan for future growth, including making smart energy choices such as locally generated renewable energy.
- Value communities and neighborhoods: Enhance the unique characteristics of all communities by investing in healthy, safe, and walkable neighborhoods—rural, urban, or suburban.
- Enhance community resiliency to the impacts of climate change: Plan investments in infrastructure, housing, and transportation in a way that recognizes climate change in the interest of physical, social and economic resiliency.

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team’s findings on this task to the Client. This presentation may occur in conjunction with presentations and meetings regarding other tasks. Each task will be addressed at a minimum by the Executive Committee, and at least one Work Group.

DELIVERABLE:

Deliverables will be an integrated assessment which includes an Analysis of Impediments to Fair Housing, Equity Assessment, and a Housing and Livability Plan inclusive of a Housing Needs Assessment

RESOURCES:

| | |
|---------------|---|
| \$ 68,600.00 | Client |
| \$ 19,975.00 | Consultant Team |
| \$ 63,750.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 152,325.00 | Total for this task |

Client for this task will include:

- South Florida Regional Planning Council
- Treasure Coast Regional Planning Council

Consultant Team for this task will include:

- Dover, Kohl & Partners (Project Leader, Task Leader)
- Jim Carras, Carras Community Investment (Task Leader)
- Gorman & Associates (Supporting Role)

Outside Experts may include, but not be limited to:

- Housing Leadership Council of Palm Beach County (Supporting Role)
- Mark Buchbinder (Supporting Role)
- Other representatives from the development community (Supporting Role)

Task 2.6 Virtual Present

The Client/Consultant Team will prepare a Present Qualities & Current Trends report which will qualitatively characterize the major social, economic, and environmental conditions predominant in the region, and trends affecting long-range prosperity, equity, and environmental sustainability. The objective of the report will be to complement and expand on the quantitative information in the data warehouse and INDEX/State of Florida Transportation Model network Existing Conditions report.

This task will describe the region's progress (prior to the full Sustainability Development Scenario) on a variety of economic and environmental variables from 1990-2000 and from 2000-2010. The results of the two periods' analysis will be used to describe current conditions and how the region arrived at its present state. The region will be described in terms of its sustainability across multiple variables for these two periods of time. (See Task 2.2). Rutgers will contribute to and review a report for this section.

A regional scorecard will be developed to rate the region in 1990, 2000, and 2010 on its Sustainability Measures. This will be done by looking at *change in the change* 1990-2000 versus 2000-2010. The *change in the change* is a powerful variable to view regional progress on sustainability measures. The scorecard will assume that past conditions leading to present conditions is TREND; this will provide insight for the TREND Future. Findings will be presented by jurisdiction of the region.

Sub-Tasks for 2.6:

- 2.6.1 Create report scope and consult with SMEs
- 2.6.2 Prepare draft report
- 2.6.3 Circulate draft for review & comment
- 2.6.4 Prepare final report

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team's findings on this task to the Partnership. This presentation may occur in conjunction with presentations and meetings regarding other tasks. Each task will be addressed at a minimum by the Executive Committee, at least one Work Group, and a Partnership Meeting.

DELIVERABLE:

A Present Qualities & Current Trends report, which will qualitatively characterize the major social, economic, and environmental conditions predominant in the region, and trends affecting long-range prosperity, equity, and environmental sustainability.

RESOURCES:

| | |
|---------------|---|
| \$ 48,450.00 | Client |
| \$ 59,925.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 108,375.00 | Total for this task |

Client for this task will include:

- South Florida Regional Planning Council
- Treasure Coast Regional Planning Council

Consultant Team for this task will include:

- Dover, Kohl & Partners (Project Leader, Task Leader)
- Duany, Plater-Zyberk & Company (Reviewer)
- Criterion (Reviewer)
- HDR, Inc (Supporting Role)

- Bob Burchell, Rutgers University (Supporting Role)
- Cardno ENTRIX (Supporting Role)
- Emerge Consulting, Clarence Anthony (Reviewer)
- Spikowski Planning Associates (Reviewer)
- Gorman & Associates (Reviewer)

Task 2.7 Existing Conditions Analysis and Modeling (based on year 2010)

Criterion will prepare and model an existing conditions case in INDEX using data from Task 2.3, and indicators in the software (referenced in Task 2.2). The base year for the Existing Conditions case will be 2010. The model's resolution level will be parcels, census block groups, TAZs, cities and counties, and/or user-defined raster cells, aggregated to sub-regions, for example: Keys, Everglades, Gold Coast, Treasure Coast, depending on indicators and data being used. Outputs will include indicator scores, indicator maps, and 2D visual representations of current regional conditions.

Regarding transportation existing conditions, the current State of Florida Transportation Model network was calibrated and validated for a base year of 2005. HDR will update the model network for 2010 in coordination with FDOT and other stakeholders reflecting the highway improvements that have been implemented since 2005. TAZ level 2010 land use data will be developed by HDR in standard Florida Statewide Model format by interpolating employment data between 2005 and 2040 from the statewide model and using 2010 Census population data. The land use and network files will be updated in the 2005 model only (as opposed to undertaking detail model calibration and validation) given the 'big picture' purpose of the project. As the statewide model doesn't include a passenger mode choice module, transit analysis will be conducted outside the model chain. HDR will only code highway improvements within the seven-county study area (Indian River, St Lucie, Martin, Palm Beach, Broward, Miami-Dade, and Monroe). Facilities outside the study area that are expected to influence trip making within the study area will also be coded into the model network according to input from the project stakeholders. Subsequently, the model will be executed and the results will be extracted and reported in a format desired by the Consultant Team.

Subtasks for 2.7:

- 2.7.1 Using 2010 census and warehouse data, create an existing conditions case in INDEX.
- 2.7.2 HDR will provide Criterion with the results of the state transportation model run, including at a minimum TAZ-level per capita home-based VT and VMT, and per employee non-home-based VT and VMT ; and congestion levels by highway segments. 2.7.4 Present draft Existing Conditions results to the client for review and comment.
- 2.7.3 Prepare an Existing Conditions technical memorandum consisting of INDEX indicators score and maps, and State of Florida Transportation Model network indicators for Dover-Kohl's use in preparing overall project reports for the public.

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team's findings on this task to the Partnership. This presentation may occur in conjunction with presentations and meetings regarding other tasks. Each task will be addressed at a minimum by the Executive Committee, at least one Work Group, and at a Partnership Meeting.

RESOURCES:

Note: The Transportation component of this Analysis may adjust given the availability of data and the degree to which Partnership Members in the transportation sphere can assist with volunteer services.

| | |
|---------------|---|
| \$4,500.00.00 | Client |
| \$ 47,940.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 51,940.00 | Total for this task |

Consultant Team for this task will include:

- Dover, Kohl & Partners (Project Leader, Reviewer)
- Duany, Plater-Zyberk & Company (Supporting Role)
- Criterion (Task Leader)
- HDR, Inc (Supporting Role)
- Bob Burchell, Rutgers University (Supporting Role)
- Cardno ENTRIX (Supporting Role)

Outside Experts may include, but not be limited to:

- Transportation Partnership Members (Supporting Role with Volunteer Services)

Task 2.8 Prepare 2060 TREND Scenario

Consultant (Rutgers) will prepare a 2060 TREND future representing the future of the region if no changes are made to existing adopted policy. The early stages of this process will involve a detailed review of currently adopted plans and policies in the region. This analysis will be undertaken by using the projection prepared under Task 2.4. The TREND forecast will be disaggregated to the municipal level, and Rutgers will formulate a method with Criterion and HDR for allocating county increments to TAZs in formats required by INDEX and the State of Florida Transportation Model.

This analysis will be undertaken by using the projections for the various jurisdictions that that would have been in place had not the Southeast Florida Sustainable Development Plan been contemplated. The TREND Future is the *impact results* for the Region reflecting the Demographic Forecast. Values in each of the variables outlined in Task 2.2 will be developed for sub-jurisdictions and the area as a whole. These will reflect the forecasts of Task 2.4. The sum of sub-jurisdiction forecasts driving values will be the result for the region. The population projection driving the results will be the projection before any of the Sustainable Development techniques/strategies have been put in place.

The TREND Future will involve more variables than the Demographic Forecast and will set the stage for the resource consumption impacts under the TREND alternative. The TREND Future will contain all projections to the TAZ and municipal level and are fixed for municipalities, counties, sub-regions and the area as a whole. TREND Future will account for incremental but minor changes towards sustainability reflective of past policies put in place. It will not reflect the major sustainability changes envisioned by the Southeast Regional Vision and Economic Blueprint.

Subtasks for 2.8:

- 2.8.1 Rutgers University Efforts: Rutgers University will produce all controlling subsets of demographic information to the community level for the TREND Projection. These projections will be for many of the variables listed in Task 2.2 These demographic projections will be fed into INDEX and the Florida Statewide Model.
- 2.8.2 Dover-Kohl Efforts: Dover-Kohl will review and comment upon submissions
- 2.8.3 Criterion Efforts: Criterion will advise Rutgers on projections as well as the data formats necessary to transmit the data to Criterion.
- 2.8.4 Cardno ENTRIX Efforts: Cardno ENTRIX and other team members will provide information for TREND on key issues and trends in each of the ten Vision scope categories listed in Task 2.3.
- 2.8.5 HDR Efforts: HDR will provide Rutgers with transportation information on current and future trips by jurisdiction by mode. They will also provide information on either lane miles or centerline miles of road at the local level for the aforementioned (2010, 2060) time periods.

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team's findings on this task to the Partnership. This presentation may occur in conjunction with presentations and meetings regarding other

tasks. Each task will be addressed at a minimum by the Executive Committee, at least one Work Group, and at a Partnership Meeting.

DELIVERABLE:

The deliverables of the TREND Future will be projections of TREND using an enhanced number of variables compared to the Demographic Forecasts of Task 2.4.

RESOURCES:

Note: The Transportation component of this Analysis may adjust given the availability of data and the degree to which Partnership Members in the transportation sphere can assist with volunteer services.

| | |
|--------------|---|
| \$ 16,150.00 | Client |
| \$ 47,940.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 64,090.00 | Total for this task |

Client for this task will include:

- South Florida Regional Planning Council
- Treasure Coast Regional Planning Council

Consultant Team for this task will include:

- Dover, Kohl & Partners (Project Leader, Reviewer)
- Duany, Plater-Zyberk & Company (Supporting Role)
- Criterion (Supporting Role)
- HDR, Inc. (Supporting Role)
- Bob Burchell, Rutgers University (Task Leader)
- Cardno ENTRIX (Reviewer)

Outside Experts may include, but not be limited to:

- Transportation Partnership Members (Supporting Role with Volunteer Services)

Task 2.9 Model Trend

Based on the 2060 trend case prepared under Task 2.8, the Consultant (Criterion) will model the trend case using INDEX in a manner similar to modeling of the existing conditions case. This will include geographic allocation to TAZs of forecasted population and employment growth according to current policies, incorporation of projected transportation system improvements to 2060, and evaluation of the case using INDEX indicators and maps. In addition to Criterion’s INDEX modeling, HDR will model the Trend case in the State of Florida Transportation Model network. The results of both models will be combined in a Trend case report.

As part of TREND creation, HDR will expand the Florida Statewide Model 2040 network through 2060 in coordination with the project stakeholders noted above. The updated network will include the transportation improvements that would be expected to be in place by the year 2060 if current trends continue. The list of improvements will include highway projects only. Any transit improvements and associated impacts on the trip tables will be analyzed offline and fed to the model chain for assignment. HDR will only code highway improvements within the seven-county study area (Indian River, St Lucie, Martin, Palm Beach, Broward, Miami-Dade, and Monroe). Facilities outside the study area that are expected to influence trip making within the study area will also be coded into the model network according to input from the project stakeholders. TAZ level land use data will be provided to HDR by the Dover Kohl Team in the standard statewide model format. Once the network improvements are coded in the model with the appropriate land use data input, the model will be executed and the results will be reported to the Project Team.

TREND Impacts will be modeled under this scenario. Rutgers will review the work of Criterion on this task. This task will involve showing the impacts of TREND to TAZ and municipal levels using INDEX

software. Rutgers involvement will be to provide confirming modeling as well as other variable modeling (if desired) at the municipal level and reviewing the impacts that Criterion and HDR have calculated for the TREND Scenario. TREND Model Results will produce a 2060 future in the Southeast Region.

Criterion and HDR will do the modeling of this task; Rutgers will assist in the modeling and write-up at the municipal level.

Subtasks for 2.9:

- 2.9.1 Using the Task 2.8 Rutgers trend forecast allocated to TAZs by Rutgers create a Trend case in INDEX.
- 2.9.2 HDR will provide Criterion with the results of a 2060 TREND State of Florida Transportation Model Network run consistent with the form and content of its 2010 existing conditions results.
- 2.9.3 Run INDEX to generate 2060 Trend indicator scores and maps.
- 2.9.4 Present draft TREND results to the client for review and comment.
- 2.9.5 Prepare a TREND technical memorandum consisting of INDEX indicators score and maps, and State of Florida Transportation Model network indicators, for Dover-Kohl use in preparing overall project reports for the public.

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team’s findings on this task to the Partnership. This presentation may occur in conjunction with presentations and meetings regarding other tasks. Each task will be addressed at a minimum by the Executive Committee, at least one Working Group, and at a Partnership Meeting.

DELIVERABLE:

A full TREND impact analysis across six HUD/EPA impact categories encompassing at least twenty variables below the TAZ level.

RESOURCES:

Note: The Transportation component of this Analysis may adjust given the availability of data and the degree to which Partnership Members in the transportation sphere can assist with volunteer services.

| | |
|--------------|---|
| \$ 4,000.00 | Client |
| \$ 11,985.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 15,985.00 | Total for this task |

Client for this task will include:

- South Florida Regional Planning Council
- Treasure Coast Regional Planning Council

Consultant Team for this task will include:

- Dover, Kohl & Partners (Project Leader, Reviewer)
- Duany, Plater-Zyberk & Company (Supporting Role)
- Criterion (Supporting Role)
- HDR, Inc (Supporting Role)
- Bob Burchell, Rutgers University (Task Leader)
- Cardno ENTRIX (Supporting Role)

Outside Experts may include, but not be limited to:

- Transportation Partnership Members (Supporting Role with Volunteer Services)

Task 2.10 Develop Range of Regional Indicators for Scorecard

This task will involve recommending how to choose from the numerous variables, those which can show progress towards the Regional Vision. This will involve a full understanding of the information which has been prepared (Regional Scorecard) as well as what comprises each of the Ten Elements of the Regional Vision. Variables must be cross-walked from the Regional Scorecard to the Vision Elements. Variables may also have to be supplemented in terms of what the current INDEX software and the state transportation model can provide. This task will be performed and coordinated with Task 2.2, Survey and Integrate Regional Values.

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team’s findings on this task to the Partnership. This presentation may occur in conjunction with presentations and meetings regarding other tasks. Each task will be addressed at a minimum by the Executive Committee, at least one Work Group, and at a Partnership Meeting.

RESOURCES:

| | |
|--------------|---|
| \$ 50,088.00 | Client |
| \$ 39,950.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$90,038.00 | Total for this task |

Client for this task will include:

- South Florida Regional Planning Council
- Treasure Coast Regional Planning Council

Consultant Team for this task will include:

- Dover, Kohl & Partners (Project Leader)
- Duany, Plater-Zyberk & Company (Reviewer)
- Criterion (Task Leader)
- Bob Burchell, Rutgers University (Substantial Role)
- Cardno ENTRIX (Supporting Role)

Outside Experts will include, but not be limited to:

- Climate Compact (Supporting Role)

Task 2.11 Select Indicators for Scorecard and Review with Executive Committee

This task will be performed and coordinated as part of Task 2.2, Survey and Integrate Regional Values.

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team’s findings on this task to the Partnership. This presentation may occur in conjunction with presentations and meetings regarding other tasks. Each task will be addressed at a minimum by the Executive Committee, at least one Work Group, and a Partnership Meeting.

RESOURCES:

| | |
|--------------|---|
| \$ 50,088.00 | Client |
| \$ 3,995.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 54,083.00 | Total for this task |

Client for this task will include:

- South Florida Regional Planning Council
- Treasure Coast Regional Planning Council

Consultant Team for this task will include:

- Dover, Kohl & Partners (Project Leader, Reviewer)
- Duany, Plater-Zyberk & Company (Reviewer)
- Criterion (Task Leader)

Task 2.12 Integrate Scorecard Indicators into Modeling Efforts

This task will be performed and coordinated as part of Task 2.2, Survey and Integrate Regional Values.

PRESENTATIONS / MEETINGS:

A representative from the Dover, Kohl & Partners team will present the team's findings on this task to the Partnership. This presentation may occur in conjunction with presentations and meetings regarding other tasks. Each task will be addressed at a minimum by the Executive Committee, at least one Work Group, and at a Partnership Meeting.

DELIVERABLE:

This task will be performed and coordinated as part of Task 2.2, Survey and Integrate Regional Values.

RESOURCES:

| | |
|--------------|---|
| \$ 3,500.00 | Client |
| \$ 7,990.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 11,490.00 | Total for this task |

Consultant Team for this task will include:

- Dover, Kohl & Partners (Project Leader, Reviewer)
- Duany, Plater-Zyberk & Company (Reviewer)
- Criterion (Task Leader)
- Bob Burchell, Rutgers University (Supporting Role)

Task 2.13 Ongoing Monitoring Program

The Client will develop an ongoing, periodic monitoring program that will evaluate regional development in terms of the Scorecard Indicators.

PRESENTATIONS / MEETINGS:

None are envisioned for the Dover, Kohl & Partners team.

DELIVERABLE:

None are envisioned for the Dover, Kohl & Partners team.

RESOURCES:

| | |
|--------------|---|
| \$ 37,300.00 | Client |
| \$ 0.00 | Consultant Team |
| \$ 0.00 | Consortium Members and Additional Experts |
| ----- | |
| \$ 37,300.00 | Total for this task |

Client for this task will include:

- South Florida Regional Planning Council
- Treasure Coast Regional Planning Council