

## **Response to Southeast Florida Regional Partnership Request for Project Ideas**

### **General Information**

ULI Southeast Florida/Caribbean, a District Council of the Urban Land Institute  
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Membership status – Consortium Member

Main Contact: Carla Coleman, Executive Director  
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ULI is not a member of Consultant Team responding to SOQ.

In addition to the Main Contact listed above, the District Council officers include:

- Eric D. Swanson, Chair & Executive Vice President of Flagler
- Mark A. Peterson, Treasurer & Sr. Vice President – Real Estate Banking, Bank of America
- Anthony J. Trella, Chair of Mission Advancement & President/CEO of Meranth Company
- Marc Kopelman, Vice Chair for Regionalism & Wealth Specialist, Raymond James & Co.
- Remainder of 25 member regional Advisory Board available on website

The Urban Land Institute was established more than 75 years ago, and the local District Council has been in existence for more than 20 years.

### **Overview and Form of Organization**

ULI is a 501(c)(3) non-profit research and education organization supported by its members, from both the public and private sectors. Its mission is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. ULI Southeast Florida's boundaries include the same seven counties contained in the Partnership, and it has more than 700 active members. In addition to a focus on regionalism, the District Council has initiatives in sustainability, housing and infrastructure (focus on transportation). The office is staffed by three full time employees.

### **Statement of Qualifications and Project Understanding**

ULI Southeast Florida/Caribbean is a founding and active member of the Partnership and Consortium, having assisted in the original grant preparation and organization of this effort. For these project ideas, we have recruited The Good Government Initiative at the University of Miami (Katy Sorenson) and Strategies for Livable Communities/SLC, LLC (Jean Scott) as partners. Each of our qualifications is outlined below:

***ULI Southeast Florida/Caribbean District Council:*** For more than 75 years, the Urban Land Institute has functioned as a multidisciplinary real estate and land use forum, facilitating an open exchange of ideas, information and experience among local and national industry leaders and policy makers dedicated to creating better places. The Southeast Florida/Caribbean District Council has a 20 year+ proven track record of planning, organizing and facilitating regional meetings, training sessions and best practice workshops. It has strong alliances and partnerships with other public and private organizations, including the Florida Redevelopment Association, AIA and APA Chapters throughout the region, Economic

Development public/private partnerships, builders associations, universities, local governments, and other real estate organizations. As part of its work on sustainable communities, ULI conducts a number of technical assistance panels annually, many of them dealing with the land use and economic health of communities in need of redevelopment. As an organization, ULI is dedicated to inclusivity and equity.

***The Good Government Initiative at the University of Miami:*** The mission of the Good Government Initiative (GGI) is to cultivate leaders of excellence in South Florida through the development and training of elected officials as well as those aspiring to run for office, and to engage the community in its governance through outreach and education. Under the leadership of former Miami-Dade County Commissioner Katy Sorenson and with the support of the Knight Foundation and the University of Miami, GGI has recruited its inaugural class of 19 elected officials at the state, county and municipal levels, which will commence August 26, 2011. GGI will provide a venue for early-career elected officials to learn the simple mechanics of how government and the legislative process operate, along with training and conversations on a variety of issues that will help them develop practices of good governance. Topics include ethics, budget and finance, land use and development, history of the community, economic development, living in a multicultural community and access to policy research. In addition, GGI is producing a series of *Community Conversations* to consider relevant political topics of the day in order to engage the community in discussions about government and public policy. The first two were held to sold-out gatherings and covered issues of the corrupting power of money in politics and civility in government. Katy Sorenson is a frequent speaker and serves as a mentor and consultant to many community activists, groups and elected officials.

***Strategies for Livable Communities/SLC, LLC:*** Jean Scott, Strategies for Livable Communities/SLC, LLC, brings 35 years of experience in building collaborative partnerships and common ground among diverse interests, conducting strategic planning and policy analysis, and synthesizing complex planning issues and policies into language that is easy to understand and provides a foundation for action. Since moving to Southeast Florida in 2000, Scott has worked with a range of nonprofit civic organizations, universities and local, regional and state governments and agencies in the areas of visioning and public involvement and understanding and strategically planning for the interrelated issues of transportation and housing choice, economic and community development and design, climate change and natural systems. Scott also brings the unique perspective of someone who has worked at the local, state and federal (U.S. Department of Housing and Urban Development) levels of government. At the regional level, she led a regional civic- and-business-based organization (Bluegrass Tomorrow) that sponsored a regional visioning process for the seven-county central Bluegrass region of Kentucky (recognized by organizations such as the Lincoln Institute of Land Policy and the Smart Growth Partners and served as a Strategic Highway Research case study) and successfully advocated for vision implementation, using a combination of public education, technical assistance and leadership strategies. She also worked as a consultant to Vanderbilt University to establish and provide start-up technical assistance to a similar organization (Cumberland Region Tomorrow) for the 11-county Nashville, Tennessee metropolitan area.

#### **General Description of Proposed Projects as Related to Work Program, including Partners & Tools**

As outlined in the Partnership General Information Form, ULI and its partners are proposing to:

- Organize, handle logistics and work with grant leadership to create agenda for large Partnership/Consortium convenings, including recruitment of participants, email invitations, registration, name tags, administrative support, etc. Many of these tasks are contained in Task 3,

including Task 3.5 Regional Scenario Workshops and Summits and Task 3.6 Develop Speakers Bureau. ULI specifically will handle this assignment.

- ULI and its partners are also prepared to support the various Work Groups and Committees with logistical and administrative support. Specific details for this project would need to be worked out with the Project Director, Program Director, and other Partnership staff. ULI and its partners have the expertise needed to provide the full range of services that the Partnership's committee's and work's will need be successful. They include, but are not limited to, arranging meetings, preparing agenda, selecting venues, keeping the committee's and working group's on schedule and on topic, managing effective meetings, ensuring all committee or group members are engaged and feel heard, and communicating committee and working group ideas and issues back to Partnership management..
- Take the leadership role in Work Group 6, Inclusive Regional Leadership & Equity, by forming a Congress of Regional Leaders as part of this Work Group's task. Building on the format available through other successful regional visioning processes, such a Congress of Regional Leaders can form the nucleus of a regional advocacy group that outlasts the grant timeframe and keeps the vision and its implementation alive through inevitable changes in public leadership. Care must be taken to include all sectors – geographic, public/private/civic and socio-economic – within this Task to create broad based, inclusive representation. ULI's reputation as a convener and "big tent" organization without a political agenda, makes it a credible leader for such a task, within the grant's framework. This is critical to Task 4: Enhance Regional Leadership & Technical Capacity.
- In partnership with the Good Government Initiative, ULI proposes to develop curriculum for workshops aimed at the public sector, using as topics the strategies needed to help local governments implement the Regional Vision and Blueprint for Economic Prosperity. The six Work Group areas and subject matter will provide the framework for the workshop curriculum, and workshops will be presented across the region. This work is included under Task 4: Enhance Regional Leadership & Technical Capacity, specifically Task 4.1 Develop Capacity Building Strategy, Task 4.3 Develop Regional Leadership Program and Task 4.4 Best Practices.
  - The exact number of workshops, locations, and frequency can be discussed in greater detail, if this project is accepted. Drawing on both GGI and ULI resources, workshop curriculum will be determined as the vision's scenarios are better defined. ULI and GGI also propose to develop the schedule for and present these workshops across the region.
  - Jean Scott of Strategies for Livable Communities is also available to assist in this task.
- Strategies for Livable Communities/SLC, LLC will take the lead in developing a regional toolbox, as outlined in Task 7: Begin Implementation, specifically Task 7.4, Create a Regional Toolbox. Jean Scott of the firm has broad experience with such toolbox creation, and if this task is completed in time, can be used/distributed through the public sector workshops, as well as through other means. Through her work with the Center for Urban and Environmental Solutions (CUES) at Florida Atlantic University, she has prepared toolboxes for the Committees for a Sustainable Treasure Coast and a Sustainable Emerald Coast and the Florida Department of Community Affairs (DCA) for use in visioning and planning processes. The DCA toolbox, *The Florida Planning Toolbox*, was peer-reviewed by a panel of state and national experts and provides a comprehensive guide to sustainable development and public involvement and education tools. The planning tools and related examples that are included are designed to promote economic prosperity and social equity, mitigate and adapt to climate change impacts, facilitate infill and redevelopment, promote full housing and transportation choice and complementary transportation and land use planning, ensure a high level of public involvement and conserve and enhance

natural, water, coastal, and agricultural lands resources. Scott recently prepared an agricultural planning toolbox for St. Lucie County as part of its Western Land Study. The toolbox was used as the basis for two public education workshops that focused on the two parts of the toolbox – economic development tools and land use planning tools designed to retain economically viable agriculture and, in doing so, agricultural lands.

### **Portfolio of Relevant Completed Projects**

**ULI:** In the SE Florida/Caribbean District Council's 20 year history in our region, it has produced a significant number of high quality conferences and convenings – more than 20 a year for at least the past ten years, and almost as many for the previous ten years. They range from major market trends analysis conferences (with attendances over 500) to small committee workshops.

As an example of the District Council's coordinating and content expertise, last year's publication of *Connecting Florida: Transit and Florida's Economy* is a good example. This 30 page, statewide booklet in support of an integrated transportation system closely connected to local land use is very much in tandem with the type of work to be done within this grant framework.

On a broader scale, ULI is a national leader in best practices for building strong, sustainable communities and has created countless publications and conferences, as well as having on staff research fellows and other resources that can be brought into this work.

**The Good Government Initiative at the University of Miami:** GGI started operating in November of 2010. It is currently in its first year, with the support of the University, the Knight Foundation, along with local corporations, foundations and individuals. The inaugural class will start in August of 2011. Completed programs are two *Community Conversations* to consider relevant political topics of the moment. The first was entitled *Civility in Government: Can it Happen in South Florida?* The panel included Senator *Rene Garcia*, former Senator Dan Gelber, former Ambassador Sue Cobb, and Pauline Winick. The second was called *Does Money in Politics Corrupt Absolutely?* and featured Broward Commissioner Kristin Jacobs, Miami Herald reporter Fred Grimm, and lawyer and lobbyist Miguel de Grandy. Seasoned elections expert and attorney Kendall Coffey moderated. GGI President and CEO Katy Sorenson brings 16 years of experience and accomplishments as a Miami-Dade County Commissioner to this work.

**Strategies for Livable Communities/SLC, LLC:** Scott's recent projects in the areas of visioning and public education and involvement include an evaluation of the Committee for a Sustainable Treasure Coast's regional visioning process and its lessons learned related to regionalism (for CUES and DCA), preparation of the final report for the Urban Land Institute (ULI)'s Florida initiative on regionalism and an evaluation of the lessons learned from the Knight Program in Community Building's five community charrettes (for the University of Miami's School of Architecture. Two additional projects include planning and managing two public education workshops related to the Scott-prepared agricultural lands planning toolbox (for the St. Lucie County Western Lands Study) and managing and providing technical support to three statewide working groups composed of diverse interests and charged by the Florida Fish and Wildlife Conservation Commission (FWC) with identifying private landowner conservation incentives (a part of the FWC's initiative to develop a statewide conservation blueprint). Scott has also been involved in providing outreach for planning projects and convening and assisting with public education workshops and peer review panels in Miami-Dade, Broward, Palm Beach, Martin, St. Lucie and Indian River counties. Her publications have covered the full gamut of critical issues facing southeast Florida, including those in the areas of climate change, urban design and natural systems, rural lands, and transportation planning. Recent articles have included an analysis of regional demographic trends and their implications (for ULI

and CUES) and an evaluation of effective habits of visioning and charrette processes (for *Florida Planning*, a publication of the Florida Chapter of the American Planning Association). Scott's work in the areas of visioning and public outreach and education has been featured in presentations to groups such as the American Planning Association, the Florida Chamber of Commerce Short Course on Growth Management and Environmental Permitting and the Florida Chapter of the American Planning Association.

### **Tools and/or Resources to Support Project**

ULI Southeast Florida/Caribbean, and through it, The Good Government Initiative and Strategies for Livable Communities will need to negotiate a contract for the work outlined in this proposal. ULI, anticipating the need to leverage the grant dollars, has applied for and received a grant from the ULI Foundation in the amount of \$17,500 to support the convening and Congress of Regional Leaders portion of the work, which will provide partial funding for those tasks. Reimbursement for the remainder of that task and the others will need to be negotiated, based on number of workshops, etc., so no fee is outlined at this time. All partners expect to donate time and talent for this grant, in addition to reimbursed payments.

### **Resumes of Key Team Members**

See attached resumes for:

- Carla Coleman, ULI Southeast Florida/Caribbean District Council
- Katy Sorenson, The Good Government Initiative at the University of Miami
- Jean Scott, Strategies for Livable Communities

## **Carla Coleman Introductory Sketch**

Carla Coleman currently serves as Executive Director for the Urban Land Institute's Southeast Florida/Caribbean District Council, which stretches from Vero Beach along the east coast of Florida and through the Caribbean. During her 7 years in this position, Ms. Coleman has focused the District Council's work program on providing some of the region's best real estate trend and redevelopment programs, workshops and convenings, as well as providing high-quality technical assistance to local governments.

Previously, she served as Senior Vice President for University Advancement at Florida Atlantic University, as well as Executive Director of the FAU Foundation, Inc. Her service to FAU spanned 18 years, 13 years as a vice president. During this time she headed external affairs for the university, managing both lobbying and fundraising efforts. With a strong background in urban planning, she shepherded growth management legislation for the State University System for more than a decade, as well as leading FAU's team in creating a 22 acre shopping center, University Commons, on state lands. This was the first such public/private partnership in Florida's university system.

Prior to her posts at FAU, she spent almost a decade with the Florida Legislature serving as a chief legislative aide, as well as executive director of a blue ribbon task force on local government issues for Broward County.

Ms. Coleman, a 38 year resident of South Florida, has a strong record of public service and leadership in professional and civic organizations. In 2002, she was named among South Florida's 50 most successful businesswomen by Fast Track Magazine and is a past recipient of the Broward County Woman of the Year in Government Award (1984), and the FAU Alumni Talon Award for Leadership (1997). She has served as vice chair of a statewide task force for the Florida Bar Association Board of Governors and currently serves on the University of Miami's Real Estate Program Advisory Committee, and the Federal Reserve Board's Educational Advisory Board.

Major research projects and publications include work in redevelopment, sustainability, charter revision, local governmental structure and organization, infrastructure finance, municipal annexation and port planning.

### **Education & Training**

MPA, Environmental Growth Management, Florida Atlantic University (1984)

BA, Communications, Lindenwood College for Women (1973)

Oxford Roundtable Summer Program, Oxford University (2002)

Presented Paper on Florida's Educational Accountability System and Experience

Facilitator Training, American Governing Boards (2002)

## **Katy Sorenson Introductory Sketch**

**Katy Sorenson** is the President and CEO of the Good Government Initiative at the University of Miami, a program to educate elected officials at the state and local level in the important issues of governance. Sorenson's commitment to civic activism began in 1965 after attending a civil rights demonstration with her cousins, and it continued throughout her career as an elected official.

In 1994, Sorenson was first elected to represent District 8 on the Miami-Dade Board of County Commissioners after defeating the incumbent in a grassroots campaign. Her southern district included more than 170,000 residents of diverse backgrounds, and it encompassed three cities and a significant portion of the agricultural lands of the County. As a commissioner, she was an outspoken advocate for human rights and equality for all residents, for the environment and managed growth, regional cooperation, child welfare issues, and support for the arts. Her proudest achievements were defeating plans for an ill-conceived airport at Homestead Air Reserve Base, a site located between Everglades and Biscayne National Parks, and sponsoring and passing an amendment to the Human Rights Ordinance which guaranteed civil rights to gay and lesbian citizens.

Sorenson was often recognized for her excellence in office, receiving the first ever Marjory Stoneman Douglas Environmental Award from the Friends of the Everglades, the "Elected Official of the Year" award from the Dade Cultural Alliance, the "Public Official of the Year" from the Florida Chapter of the American Planning Association, the Champion for Children Award, the Women of Impact Award, and the Herbert Hoover award as Conservationist of the Year, among many others.

She served as Vice Chair of the Commission from 2002-2004, was on the executive committee of the South Florida Regional Planning Council, and was Chair of the South Florida Regional Transportation Organization. She also served on the Board of Directors of the Florida Association of Counties. In 2004, she was selected to attend Harvard University's Senior Executive Program in State and Local Government at the Kennedy School of Government.

Sorenson received her Bachelor's degree in Social Work from the University of Wisconsin, Milwaukee and her Master's Degree in Social Work from the University of Wisconsin, Madison. She served as a legislative aide to Illinois State Senator Dawn Clark Netsch, as a political consultant, and as the executive director of California Women Lawyers Bar Association. She has been married to Janis Dzelzkalns, M.D. since 1978 and they have two adult children, Emma and Arnie. She lives in Pinecrest with her husband and Inga, their cat.

## **Jean Scott Introductory Sketch**

Jean Scott brings 35 years (11 in southeast Florida) of experience in designing and managing public planning and outreach and education processes, building collaborative partnerships and common ground among diverse interests and analyzing and synthesizing complex planning issues and policies into language that is easy to understand and provides a foundation for action. She also brings to a project the unique perspective of someone who has worked at the local, state and federal levels of government and who has led a civic organization that primarily focused on cooperative regional planning, education and leadership.

Scott has worked with a broad range of governmental and nonprofit civic organizations, businesses and universities in the areas of visioning and public involvement and planning for the interrelated issues of transportation and housing choice, economic and community development and design, climate change, social equity and natural systems. Her work on outreach and communication and building collaborative partnerships has been featured in presentations to groups such as the American Planning Association (APA), the Florida Chamber of Commerce Short Course on Growth Management and Environmental Permitting and the Florida Chapter of the American Planning Association (APA Florida).

Prior to moving to Florida in 2000, Scott was the founding Executive Director of Bluegrass Tomorrow, a regional planning civic and business leadership organization in the seven-county central Bluegrass Region of Kentucky that has been nationally recognized for its successful initiatives to resolve divisive growth and resource management conflicts and build areas of mutual action among competing interests. Accomplishments include a nationally recognized regional visioning initiative that was the focus of a case study for a Strategic Highway Research Project examining the linkages between community visioning and transportation planning processes and featured in national publications and at conferences of organizations such as the Lincoln Institute of Land Policy, Smart Growth Partners and National Trust for Historic Preservation. Examples of successful regional projects include the Bluegrass Public Officials Roundtable, programs to maintain farmland and promote infill and redevelopment and adoption of inter-county transportation corridor management plans.

Her earlier positions include, for the city of Ashland, Kentucky, serving as the director of a department that including planning, housing and community development and later as the city's Economic Development Coordinator, a position shared with the Chamber of Commerce. Successes include establishing a coordinating Regional Economic Development Council. Prior to Ashland, Scott established and directed the state of Kentucky's first housing and community development department. That followed four years (at the regional, state and federal levels) with the U.S. Department of Housing and Urban Development.

### **Education**

BA, Human Relations, University of Kentucky

MA, American Studies, University of Maryland