

**JOINT STUDY SESSION
OF THE UNIVERSITY CITY COUNCIL
AND THE CITY PLAN COMMISSION**
5th Floor of City Hall
6801 Delmar
January 9, 2020

AGENDA

Requested by the City Manager

1. MEETING CALLED TO ORDER

The Joint Study Session of the City Council and the City Plan Commission was held in Council Chambers on the fifth floor of City Hall, on Thursday, January 9, 2020. In the absence of Terry Crow, Mayor Pro Tem Paulette Carr called the Study Session to order at 6:02 p.m.

In addition to the Mayor Pro Tem, the following members of Council and the City Plan Commission were present:

Councilmember Steven McMahon
Councilmember Paulette Carr
Councilmember Jeffrey Hales
Councilmember Tim Cusick
Councilmember Stacy Clay; (*Arrived at 6:07 p.m.*)
Councilmember Bwayne Smotherson

Commissioner Ellen Hartz
Commissioner Cirri Moran
Commissioner Judith Gainer
Commissioner Michael Miller; (*Arrived at 6:30 p.m.*)

Also in attendance were City Manager, Gregory Rose; City Attorney, John F. Mulligan Jr.; Director of Planning & Zoning, Clifford Cross; David Beurle of Future IQ; Jon Stover of Jon Stover & Associates; Jamie Greene, Sara Kelly of PlanningNext, and Kevin Hively of Ninigret Partners.

2. 2020 COMPREHENSIVE PLAN CONSULTANT INTERVIEWS

Mr. Rose stated this is a presentation by two companies interested in conducting the City's Comprehensive Plan Update.

Director of Planning & Zoning, Clifford Cross stated the first presentation in response to the City's RFP will be conducted by Mr. David Beurle of Future IQ, and thereafter, Mr. Jon Stover of Jon Stover & Associates will make his presentation.

Mr. Beurle stated Future IQ has collaborated with a number of different firms and thinks this collaboration with JS & A is exciting. Both companies are relatively small, yet they have a deep passion for the ability to get to the real issues because that's what produces great work. This really is a big deal and an important conversation. U City will be laying down a future positioning story about its community with a framework and roadmap, and you've got to get it right.

FUTURE IQ - THE COMPANY

- Global Headquarters - P.O. Box 24687, Minneapolis, Minnesota 55424
- Offices - North America, Europe, and Australia
- Established - 2003

The Team

- David Beurle, Founder
- Planning and Foresight Specialists
- Data Analysts

Recent Projects

- Park City, Utah
- Smithville, Missouri
- Wisconsin
- San Diego, California
- Coppell, Texas
- Windsor Castle

Strengths

- Visioning
- Plan development

JS & A - THE COMPANY

- Offices - 1718 1/2 Florida Ave NW, Washington, DC 20009
- Established - 2009

The Team

- Jon Stover, Founder
- AICP Certified Professional Planning Specialist
- Public Policy and Community Development Specialist

Recent Projects

- Fiscal and Economic Impact Analysis
- Revitalization Strategies
- Economic & Demographic Analysis
- Public Planning Initiatives
- Real Estate Market Analysis

Strengths

- Economic Development
- Small Area Planning
- Policy & Execution

The Comprehensive Plan Approach

Listed below are the consistent elements that need to be in place in order to produce a good plan. All elements will be included in the process because both companies view the comprehensive planning process as an opportunity to educate citizens and engage them in meaningful conversations about how the future might unfold. Without these elements, U City will simply end up with a better version of its current plan.

- **Future-Oriented**

As you look forward to 2040; the timeframe for this plan, you will go through a period where there will be wave after wave of very profound changes:

- Generational demographic transitions that bring new appetites and values;
- The next industrial revolution;
- Artificial intelligence;
- Automation;
- Robotics;

- Seeds of the future;
- Changing demographics;
- Workforce development;
- Manufacturing;
- External trends, and
- The future of urban living

Future IQ established a partnership with Windsor Castle and numerous experts to conduct a two-day residential think tank to determine;

- ✓ What it will be like for people living in cities in 2050
- ✓ Where society might evolve, and
- ✓ What society might look like in ten or fifteen years

Mr. Beurle stated another part of the process is to think about the evolution of different parts of this community. U City has a fascinating sort of concentric sectors, from buildings like this one to the downtown area, and diverse neighborhoods with close proximity to hospitals, universities, the airport, and the City of St. Louis. So he is eager to see how these different zones interrelate today and evolve in the future.

- **People Focused**

In today's world, people expect to have a say. They want the processes to be more transparent, but they don't want to spend a lot of time on them. So, processes have to be designed in a way that makes it easy for people to engage; is meaningful; makes them feel like their input makes a difference, and is both fun and interactive.

- Surveys
- Structured face-to-face engagement that allows you to get to the heart and soul of people's aspirations and desires
- Youth engagement

- **Data-Driven**

Data sources utilized by JS & A:

- GIS
- Esri
- CoStar
- M-Plan
- Credit card data; who on the outside is spending inside and who on the inside is spending outside
- FirstNet/SpaceNet; important when looking at a 20-year purview

There is a need to not only project what is happening within U City, but how that activity fits into the projections of what's happening commercially, residentially, and economically in the greater metropolitan area.

JS & A is especially proud of its ability to produce top-notch in-house data analysis, as well as their capacity to communicate this information in a tactful, thoughtful, and useful way that all audiences can read and understand.

Mr. Beurle stated this should be a living document that guides the community, so their objective will be to make sure information is captured and presented in an easy to use format. A great deal of the data will be placed on data utilization portals so people can access it, and reports will include designs that help tell the story in an intelligent and thoughtful manner. He stated both companies agree that the key to making this Comprehensive Plan Update truly fascinating will probably be the community engagement aspect of the process. Those conversations will lead to the crucial positioning story about U City's future.

- How do you deal with the tough issues?
- How and where are you positioning U City in this landscape?
- What kind of community are you striving to create?

The plan then becomes the roadmap for how you interpret and execute those resolutions.

Mr. Beurle stated they are also very conscious of the fact that there is an Economic Development Strategy process underway. These two processes can really power each other, so there is a need for them to be strategically tied together.

Mr. Stover stated they also have experience with the next step, which is a zoning update. So another goal will be to make sure the Comprehensive Plan draws a roadmap that leads to a more form-based type of code.

Councilmember Hales asked what size community did the 1,300 responses depicted on the community engagement slide represent? Mr. Beurle stated that was Coppell, Texas, a population of about 30,000. However, these are not one question surveys they are detailed, numeric, and open-ended responses that provide a deep probe and collects large volumes of data that explores the issues and themes that are most important to people. That data is then used to assist them in conducting word characterization, qualitative, and quantitative analyses that help build the complete picture of people's perspectives and priorities. So these 1,300 responses are what he would call high-quality data points where someone has invested 30 minutes of their time to complete.

Councilmember Clay asked Mr. Beurle if he could talk a little bit about what a Think-Tank Workshop is and how they are conducted? Mr. Beurle stated a Think-Tank is a deep dive into thinking about the future. Typically, it consists of two evenings or two half-days spent with a fairly large cross-section of the community; 100-200 people. Their purpose is to do the heavy lift in terms of thinking about possible future scenarios that can be viewed in a variety of different ways, and generate outcomes that will have specific implications in terms of consequences and impacts.

He stated at the start of these processes what they like to do is play out those different scenario iterations and give the community something to react to. So this is where local people are doing the work to think about plausible futures for their city, gain a better understanding of the types of implications they can expect, and then determine which one of those scenarios resonates with them. Mr. Beurle stated this process stimulates a lot of research that tests those assumptions and helps them drill in on the vision.

Councilmember Clay stated the 3rd Ward population is more accustomed to in-person meetings, so he is a little concerned about their response ratios to electronic surveys. Do you have any best practices around the in-person piece related to marketing and how to get folks engaged? Mr. Beurle stated unfortunately, there is no real silver bullet for this issue. In the case of Coppell, while they might have only had 13000 survey responses, they also conducted twenty-four engagement workshops. So you can take the shortcut and just do a quick survey but that will not get you where you need to be. Future IQ is an advocate for face-to-face engagements, sitting down with people in a familiar setting and having a really good structured conversation. Typically, they try to map out what the community looks like so there will be different ways the community gathers and where they gather, but each process is customized for that particular community and a series of workshops are conducted at different times of the day and night. In Coppell, they started at eight in the morning, went until ten at night, seven days a week, and conducted one workshop during that timeframe. They went to high schools, senior centers, neighborhood meetings, et cetera. Some were incredibly successful, while others only produced a few people. Mr. Beurle stated their goal is to get to the nitty-gritty of what people are dealing with and really try to understand what that is. Obviously, no matter where you go there will be very different socioeconomic backgrounds that you must try to work across. But that's one of the areas where he thinks they have an exceptional skill set; the ability to relate to people no matter who they are and where they come from.

Councilmember Clay asked Mr. Beurle if he could provide more information about the youth engagement process? Mr. Beurle stated youth engagement was probably integrated into their community planning work two years ago and it is done on a large scale. Its purpose is twofold; it gives you a good insight into what the emerging population is thinking, and once the message is introduced, they take it home. In some instances, it was conducted with an entire high school in a series of revolving sessions.

But typically, it is presented in a way where the topic about the future of the community becomes a part of whatever they are dealing with in their curriculum and prompts discussions about trends, what they mean for the community, and what they mean to them. Those discussions become an important data set that is captured using surveys.

Another characteristic of youth engagement is that it seems to punch through some of the skepticism or resignation others in the community might have. And when you dig into the data, what's really interesting is that young people today are very impatient, they're like, just get on with it. Let's get moving and fix these issues. So it can also provide momentum to the community conversation.

Councilmember Cusick asked if the topic of environmental sustainability would be addressed, and if so, how? Mr. Beurle stated there is no community that either he or Jon is working on today, where that topic does not come up. Usually, it occurs in youth conversations. They want to ban plastic bags and everyone to utilize solar power, so there is an incredible underlying groundswell for those types of issues that come out during the first steps of the process. He stated their intent is to look at this data and portions of the Comprehensive Plan to see how they mesh together and if there are elements or ideas that need to be added to the update. He stated it is dealt with from a policy perspective because the vast majority of communities don't have a renewable energy policy, but today, it's almost an imperative.

Mayor Pro Tem Carr stated many of the youth in U City attend private schools and without that population, she thinks you will miss a large segment of young people. So do you have any thoughts on how you would engage them? Mr. Beurle stated they are interested in reaching young people from all components of the community, so they don't have a fixed Rubix where it has to be the high school. There are conduits of connections in every community they rely on; like all of you here tonight, to supply them with a lot of the intelligence about how U City works and how to reach certain groups of people. Youth voice is really important, so it's something they will have to work out fairly early in the process.

Mr. Stover stated as outsiders they don't know the sub-neighborhoods in U City the way locals do, so to really connect the dots they will have to lean on the folks that do know. So it's getting in touch with the Mayor, Council, Commissions, churches, community centers, and staff, which will help them understand the deeper levels and lead them to the right answers.

Mayor Pro Tem Carr stated people aren't naturally primed to provide the kind of tangible information you might be seeking from the community engagement process and what she's learned is that it works best when there is structure. Is it your intent to start with some kind of structure that over time evolves into more participation? Mr. Beurle stated what you've identified is the very reason why they have a highly structured approach to engagement. He stated the two things that make his blood run cold is the sticky note exercise where you collect information that cannot be analyzed or used in any meaningful sense and asking folks what they think or want without the necessary framework. Because all you'll get is things that are un-attributable or create false expectations. That's why the Think-Tank occurs early on in the process because it's where you do the deeper thinking about future options that are then presented to the community and narrows their focus around work that is already being done by folks in the community. We want them to think about clear and plausible options; see what that looks like; react to those options, and finish, with a fundamental understanding of what they want their preferred versus expected future to look like. That's what leads you straight into what roadmaps need to be in place in order to get from where you are today, to that preference.

So while there is quite a bit of structure, there's also a component of idea generation because they want this to be a creative process that ultimately leads to a very clear, data-driven consensus-based approach to this community's view of their future. Their ultimate goal is for folks to walk out of this comprehensive planning process saying this is where we're headed and here's our roadmap for how to get there.

Councilmember Hales stated one theme of this community is its success in being incredibly diverse in a multitude of different ways. So, how much experience, if any, has this team had working with communities that have the same level of diversity as U City? Mr. Beurle stated one example is Hilton Head Island off the coast of South Carolina.

It's a very prestigious destination retirement and tourist community with an unusual social demographic where about 70 percent of the people from all over the world, live in gated communities, and the remaining 30 percent that lives outside of those gated communities who are largely fifth or sixth generational descendants of slaves. So it was a really fascinating project where they worked to implement a process that would reconcile these extremely different perspectives and aspirations for the Island's future.

He stated both companies have a lot of experience in various areas of diversity and currently they are conducting a community visioning and planning process in Park City, Utah. Here, you have a mega-resort location where 25 percent of the population; which is sort of under the radar, is Hispanic. Both he and Jon understand that you don't want to end up with the average response. You want to understand how different parts of the community think about certain issues. So the real power lies in the data-driven and economic understanding components of their process which allows you to filter into all of that data to determine exactly how those different cohorts view issues differently.

Councilmember Hales stated the challenges in his Ward will be different than the challenges in Bwayne and Stacy's or even Tim and Paulette's. So will this project be initiated by gathering that sort of background information before entering into the community engagement process? Mr. Beurle stated they know there will be tripwires in the community or issues that could derail things. And while that's part of the intelligence they would be interested in learning about prior to the community discussions, they also believe that if you want to have a true visioning process then you can't shy away from the tough conversations because it's really important for people to see that this is the real deal. That's why they put a lot of effort into making sure it's open and transparent by posting all of the data, briefings or summaries, online.

He stated their interest is in working with people who truly want to honor a thoughtful and authentic community-driven process. And what he and Jon are presenting tonight is based on their read of the RFP, which illustrates that U City is very serious about wide and deep community engagement that reveals the true voice of people who live here. So what they want to offer is a two-way process where folks walk out the door knowing more about their future and what the possibilities are, than they did when they walked in. This is your one in a ten-year opportunity to have a real conversation about your future and how to create a community that will best serve you collectively, as you roll out a plan over the next five, ten or twenty years.

Councilmember McMahon asked Mr. Beurle if he could differentiate the scope of the Think-Tank versus the community engagement, to make sure everyone is clear about the players at these two stages of the process? Mr. Beurle stated here is an example from Coppell, Texas; they ran an online and printed multi-linguist community survey comprised of broad questions on issues and perceptions of the future for six months; which in part, helped to inform the Think-Tank. Information obtained from the Think-Tank was then utilized during their community engagement sessions where a whole range of workshops were established to generate additional detailed input. Next, they reconvened the Think-Tank to look at all the data obtained, which was then disseminated to focus groups. That led the community to the point of having a vision and Future IQ to the point of translating that vision into reality through the creation of a roadmap.

Councilmember McMahon stated while you clearly want transparency and the community to feel genuinely engaged in the process, if the Think-Tank; which sounds like a more selective group, is conducted prior to the community engagement, what's the strategy to ensure that the community feels involved and that they don't walk out thinking this was a done deal before they even sat down? Mr. Beurle stated that's a situation they've also come across. And in those cases, what has worked very effectively is to make sure you've got people who can really hold the conversation and have an interest in the ability to have future-oriented conversations. It's a balance, so what they typically do is work with folks who can help them identify all the different groups within the community, and then invite nominations from those groups to ensure that the community engagement is representative of all. That invitation says; here is the type of person we want from your group:

- Somebody who wants to have a deep conversation about the future
- Somebody who brings a certain perspective
- Somebody that can represent the voices of your group

Finally, to enhance that effort of being accused that the issues have already been decided, applications are provided to allow people who want to be a part of the Think-Tank to apply. And while you can select people from that pool of applicants, typically, everyone who applies is accepted.

At the end of the day, the context of the Think-Tank is a group of people representing the community with a goal of bringing collective concerns about the future together.

Councilmember McMahon stated although the students from Washington University are transient, it would be great if some of them stayed or came back to live here. How would your process incorporate this segment of our youth population? Mr. Beurle stated the nearest campus in Hilton Head was located off the island, so they worked with students enrolled in curriculums where their skill sets could be utilized by industries on the island. There has to be some sort of a connection or relationship versus a random, "*What do you think of U City,*" in order to make their interactions meaningful. So if there are specific curriculums or groups of students that fit into that category they could be incorporated into the youth engagement process.

Councilmember Smotherson stated one of your slides indicates that you have a global presence that helps bring local solutions, and from his viewpoint, U City symbolizes that global world. Consequently, his interest is not in the cookie-cutter resolutions or to become another Milwaukee, but rather, to discover what global solutions could be employed in this community. Mr. Beurle stated he is not interested in cookie-cutter resolutions because that's a lazy way that never produces any real outcomes. So while there is an established methodology based on their knowledge of what works that give you a backbone for the structure, what you'll see if you look at their website is that the content for each project is built from scratch based on feedback from the community. Even the axis that primarily shapes the Think-Tank or scenario planning process is built from surveys and dialogue from the community. And that's why your plan won't end up looking like Milwaukee's plan.

The other piece he brings from Future IQ, and Jon's firm brings from a local economic development aspect, is a push on future trends. There are clear issues that any community worth its salt today, has to be wrestling with, and that's part of the education. So in the first part of the Think-Tank where they talk about future perceptions, internal/external drivers, and key trends, is where future trends will also be discussed. He stated through the course of a project like this, they work with the community to develop a communication narrative around how they can start to build a conversational pact within the community to think about things like;

- What are the emerging trends we need to be thinking about?
- What does artificial intelligence mean to U City?
- What are autonomous cars going to mean to U City?
- What are generational changes in our society going to mean?

So starting that conversation on these key drivers; some are external, some are internal, at the Think-Tank level, helps communities begin to think about how they can be combined to shape different possibilities for their future.

Mr. Beurle stated they will be pushing this future-oriented methodology throughout all of these sessions. Because you certainly don't want to walk out of this and realize five or ten years later that you should have looked at these issues, and that the only thing you've accomplished is a better version of the plan that already exists.

This could be a very interesting location where a community wrestles with some issues in a different way than others. Or this might be the location that comes up with some really innovative planning solutions that solve important issues. This is not about the fact that you simply want to be good. So if you want to have a great comprehensive plan then you have to push on all of these things; some of which may be outside of what we currently know.

Unidentified Commissioner: Has anybody reviewed our existing Comprehensive Plan? Mr. Beurle stated both he and Jon have looked at it. Unidentified Commissioner: Is the plan to start from square one or build onto what currently exists? Mr. Beurle stated they are very conscious of the fact that a part of U City's DNA is an established and influential history that must be taken into account. So they see this as a future positioning opportunity that builds on the City's current and past comprehensive planning.

Mayor Pro Tem Carr and Mr. Cross both thanked Jon and David for their presentation.

Mr. Cross stated the team of PlanningNext and Ninigret Partners is the second group to be interviewed as a part of this process.

They are represented by Jamie Greene and Sara Kelly of PlanningNext, and Kevin Hively of Ninigret Partners. Mr. Cross stated in fairness to these participants who were not present during the initial introductions, he would like to extend the same courtesy.

PLANNINGNEXT - THE COMPANY

- Offices: 75 West Third Avenue, Columbus, Ohio 43201
- Established: 1994; (formerly ACP Visioning + Planning, Columbus)

The Team

- Jamie A. Greene, Principal; AIA FAICP
- Sara D. Kelly, Project Manager; AICP
- Kevin Hively, Principal; Ninigret Partners

Planning Next is currently working with Ninigret Partners on a number of projects throughout the country, who consistently deliver high-quality work on economic prosperity issues for communities.

The Experience

- **Working in University Communities**

- Amherst, MA
University of Massachusetts+
- Athens, GA
University of Georgia
- Burlington, VT
University of Vermont
- College Station, TX
Texas A & M University
- Columbus, Ohio
- Ohio State University
- Davidson, NC
Davidson College
- Dayton, OH
University of Dayton
- Fargo, ND
North Dakota State University
- Greenville, NC
East Carolina State University

- **Community Planning + Implementation**

It isn't just something we do, it's what we do.

- Comprehensive Plans
 - ✓ Shaker Heights, OH
 - ✓ Upper Arlington, OH
 - ✓ Prairie Village, KS
 - ✓ Independence, OH
 - ✓ Seven Hills, OH
 - ✓ Grandview Heights, OH
- Strategic Plans
 - ✓ Overland Park, KS
 - ✓ Valparaiso, IN
 - ✓ Franklin, TN
 - ✓ Muncie, IN
 - ✓ Gahanna, OH
 - ✓ Yellow Springs, OH

- **Neighborhoods - Region/Citywide/District**
 - *East Central Indiana (region)*
 - *Montgomery AL (citywide)*
 - Haverhill MA (citywide)
 - Kansas City KC (district)
 - *Dayton OH (district)*
 - Pittsburgh PA (neighborhood)
 - Fargo ND (downtown)
 - Grand Rapids MI (downtown)

- **Economic Development - Housing/Retail**
 - *Tuscaloosa AL 5 year Housing Plan*
 - Macon GA Downtown Retail
 - Brockton MA Downtown Dining
 - St Louis MO Grand Center Housing
 - *Flint / Genesee County MI Economic Vitality Strategy*
 - Hartford CT Citywide Housing Analysis
 - Philadelphia Manufacturing Strategy
 - Dallas TX Mobility & Economic Development
 - New Haven CT – Neuroscience Sector

- **Anchor Institutions**

Work performed on behalf of the institution or community to solve problems around university impact, student housing and its impact on the community, economic development, and potential partnerships.

 - Burlington VT (U Vermont)
 - *Tuscaloosa AL (U Alabama)*
 - New Haven CT (Yale)
 - Providence RI (Brown / HELP Coalition)
 - *Athens GA (U Georgia)*
 - *Dayton OH (U Dayton / Premier Health)*
 - Stamford CT (Stamford Health / UCONN)
 - Philadelphia PA (UPENN / CHOP)
 - College Station TX (Texas A & M)
 - Mansfield CT (UCONN)
 - Richardson TX (U Texas Dallas)
 - Grand Rapids MI (Michigan St / Spectrum Health / Grand Valley St / Kendall School of Design)
 - Springfield MA (UMASS Amherst)
 - New Bedford MA (UMASS Dartmouth)
 - *East Central Indiana (Ball St / Ball Memorial Health)*
 - Pittsburgh PA (UPITT, Duquesne U, Carnegie Mellon, UPMC Health)
 - Macon GA (Mercer U)

- **National Recognition**
 - 2019 APA Small Town & Rural Planning Division
Vernon Deines Award for a Special Project Plan
Vibrant Communities, Elkhart County, Indiana
 - 2014 American Planning Association
Planning Excellence
East Franklinton Creative Community District Plan
 - 2014 American Planning Association
Burnham Award for a Comprehensive Plan
Plan Cincinnati, Cincinnati, Ohio

- 2013 Congress for the New Urbanism
National Honor
East Franklinton Creative Community District Plan

NINIGRET PARTNERS - THE COMPANY

- Offices: 11 South Angell Street Providence, RI
- Established: December 2001

The Experience

- Corporate strategies; primarily involving market and customer strategy
- Management Consultant
- Economic development
- District & city planning issues
- Communication & engagement

Mr. Hively stated his firm is a little different than typical firms involved in these kinds of projects. While they continue to maintain a focus on the categories listed above, it is their evolution into the area of economic development that sets them apart. Rather than looking at this work from a real estate perspective, Ninigret looks at economic development through the lens of how a business works; what they need, and the role that talent plays.

- **Award-Winning Project Teams**
 - MI APA Best Comprehensive Plan, Grand Rapids Forward
 - TX APA Economic Development Plan Award – Collins Arapaho Innovation District
 - IDA Pinnacle Award, Grand Rapids Forward
 - Best in Class Firm – Indiana Regional Cities
- **Nationally Recognized Projects**
 - Sustainia's 100 Best Climate Change Projects for Pittsburgh's EcoInnovation District
 - Fast Company United States of Innovation RISD Design for Manufacturing Innovation program
- **Ninigret Partners + PlanningNext - Current Implementations**
 1. Athens, GA: follow on with Innovation Initiative leading to UGA Innovation District and Athens Creative Development Campus plus the dedicated staff person
 - Countless hours spent with UGA leadership on the need for this initiative
 - UGA recently announced the implementation of their own Innovation District on campus
 2. Montgomery, AL: working with an economic development team on identifying needed capacity and focus areas to implement key parts of the plan
 3. Tuscaloosa, AL: Elevate program to fund several key livability initiatives, initiating comprehensive zoning code re-write
 - Montgomery passed a large bond issue to implement some of the livability initiatives
 - Zoning codes update. PlanningNext developed the physical part of the plan with an orientation towards character-based areas, as opposed to land use, based on community engagement that stressed the importance of quality of place
 - All of the land use is defined by character, which allows the zoning updates to be comprised of unique form-based standards

The Team Approach

- **After the Plan**
Our reputation is built on what happens after the planning process is complete.
The focus is on how to position the community in the best way to accomplish the plan's design.

- **Insights: Economic and Housing**

Mr. Greene stated he spent about 6 hours driving around the community today, which gave him a slightly different perspective on some of these insights.

- Do not underestimate the role of aligned interest and/or institutional self-interest
 - ✓ It's hard to engage with an institution if there is nothing in it for them
- Students distort the housing market in specific locations
 - ✓ New policies can create unintended consequences
- Need to rethink commercial (retail) areas
- Housing quality matters
 - ✓ First ring suburbs are the really hot places today
 - ✓ Millennials have now turned thirty; they are buying houses; they are concerned about schools; they are concerned about transportation, and the type of environment they live in

- **Case Study**

Renew the Vision: Upper Arlington, OH (*First Ring Suburb*)

Population 34,000 * Land Area 10 square miles

While no two cities are alike, there are some relevant parts of this story because the eastern edge of the City sits up against Ohio State University's West Campus.

- Founded in the early 1900s
- No plan for 40 years
 - ✓ It was clear at the outset that the most cherished value of Arlington was maintaining the status quo
- Landlocked
- Unfavorable fiscal trends based on the way land was used or not used
- Challenging political environment

- **Focus on Infill & Redevelopment**

Goal: Achieve fiscally and environmentally sustainable, high quality, and contextually relevant development.

- ❖ Limited land is available for new development
- ❖ There are seven non-residential areas
- ❖ There is no Class A office space in the entire City
- Employ relevant land-use strategies
 - ✓ Developed specific character and economic area plans
 - ✓ Elected officials rezoned all seven non-residential areas
 - ✓ Developed new zoning codes
 - ✓ Growth in some of the corridors has been phenomenal
- Promote contextually compatible infill development

All of these actions are the result of a planning process that incorporated strong community engagement and a compelling technical strategy. This suburb is literally on fire in terms of being a place where young people and employees of the university want to live.

In 2018 the team was invited back to Arlington to help them with preserving the existing character and promote infill, in denser neighborhoods that had a smaller scale of single-family homes, and a fair amount of multi-family housing. At the same time, there was also a lot of mistrust in the City's government and a polarized opinion about exactly how development should take place. A major factor in the team's success was based on its ability to change the tenor of the conversation by paring it down to form and character:

- What they loved about their community?
- What characteristics within their community were meaningful?
- What we all could do to capitalize and build off of these values?

The creation of a form-based character for change provided the team with the right information to put a series of recommendations focused on housing quality and variety in place; things the team understood they would be eager to rally around. Within a short period of time, those recommendations resulted in several new policies and changes to the code. Those changes and the team's recommendations provided the community with the tools and guidance needed to implement this work.

- **Understanding the Project**

1. Achieving inclusive participation
 - Anyone who cares about this community will have a choice to become involved in the process
2. Integrating analysis and intuition
 - This needs to be an interactive process where the team's analysis informs public engagement, provides direction, and the team listens to better understand how their analysis should be focused
3. Defining the Vision
 - Clarity from the very beginning
 - Elevating the conversation by encouraging people to think big about the future
4. Garnering long term support and commitment
 - Building support and enthusiasm throughout the process to ensure implementation
5. Creating achievable goals and actions
 - The focus is on implementation

- **Process Summary**

A proposed 15-month process that includes the following phases:

1. Preparation
 - Orientation and plan review
 - Public engagement strategy
2. Public Engagement
 - Face-to-face rounds and other alternatives
 - Listening and learning
 - Community choices
 - Open House
3. Steering Committee
 - A representative group that will be the team's spokespersons throughout the process
4. Analysis
 - Informed by public engagement
5. Plan Development
 - Draft plan
 - Final plan

- **Demographic Information**

PlanningNext and Ninigret Partners are both committed to making sure they have a solid understanding of the baseline existing conditions and trends that will underpin the entire planning process. There is a need to be strategic; focused on the important questions, and to make sure all of their information is presented in a format that everyone in the community can understand.

- **Inclusive Community Engagement**

1. Communications
 - *Key messages*
 - ✓ *Discovering the core messages that will resonate with the community*
 - ✓ *Establishing impactful channels to deliver the message*
2. Outreach
 - *Word of mouth invitations*

- *The utilization of Ambassadors throughout the entire process*
 - ✓ *Friends and neighbors*
- 3. Engagement
 - *Learning from the community*
 - *Utilization of multiple techniques*
 - *The ability to ask questions in the right way*

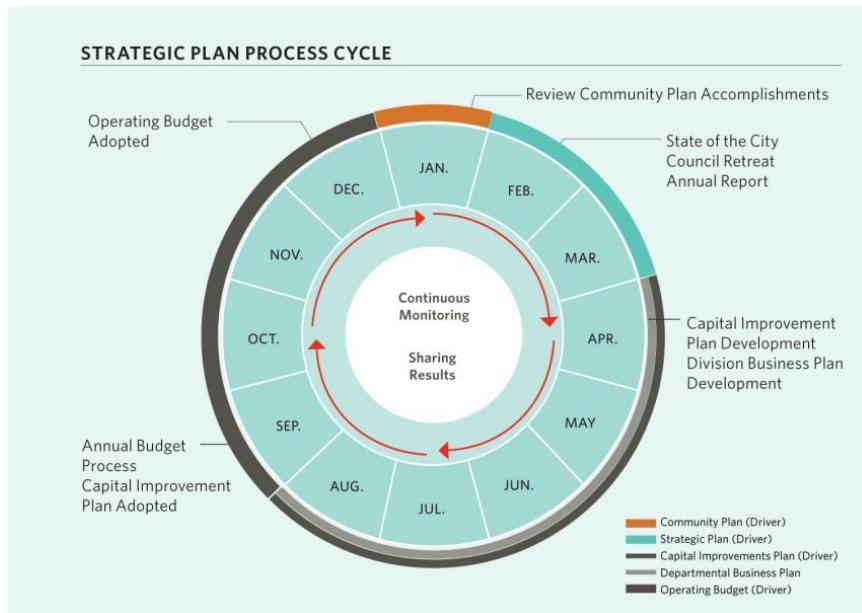
This next graphic looks at how communities can implement their Comprehensive Plan by thinking about it as a cyclical process rather than a linear process. To continuously achieve goals and ascertain the community's progress, the plan should be contemplated, examined, and reassessed on a one, two or five-year cycle. It should be discussed:

- In State of the City Reports
- At Council Retreats
- In Annual Reports

It should be integrated into:

- Capital Improvement Plans
- Division Business Plans
- Development Plans
- Yearly Budgets

This is the segment of the process where the work this team does adds value and continues to pay dividends many years after the work is completed.



Commissioner Hartz: I am thrilled to hear about your experience with universities because that is a huge issue for U City. But another element of this community that is extremely important is our 3rd Ward, which has issues uniquely different from those being experienced by the university. So I think the ability to achieve the maximum engagement from residents of this Ward is of the utmost importance. What methodology would your team employ to ensure their participation? Mr. Greene stated the first bullet under the Approach was inclusive engagement because they know that typically, engagement is a self-selective process. Therefore, the team puts a lot of effort into marketing the plan; making sure people are aware of the opportunities and are comfortable participating.

They view the Steering or Advisory Committee as being reflective of the entire community.

That means, it should be comprised of residents from each Ward who others are confident will represent their interests, be their voice, and play a role in every topic being discussed. At various times they have even utilized an Outreach Committee, which is sort of a word of mouth type of marketing. It's comprised of individuals who are recognized throughout the various Wards and possess a level of comfort that allows them to easily converse with their neighbors about relevant information, and encourage their participation. But, that may not be suitable for every community, so another strategy is for the team to act as the Outreach Committee and conduct these conversations. Mr. Greene stated all of this is designed in the process because their ultimate goal is to ensure that no stone is left unturned when it comes to garnering participation during the engagement process.

Councilmember Cusick asked who the Steering Committee would be comprised of? Mr. Greene stated the decision about who these members should be is usually left up to the community. Sometimes there are entities like this Council or Commission that acts as the nominating committee. Or maybe it's like Cary, North Carolina where the elected officials believed they needed help getting beyond just the people they knew. So they put together a campaign where 400 people submitted applications of interest to participate on the Steering Committee. This committee is the first step in the inclusion process, so it should be comprised of a representative group from the community that everyone can look at and relate to.

Councilmember Cusick stated he was still a little unclear about how the process actually works. Will this team provide the committee with a template that guides them in the right direction or will they be asked to identify problems or areas of interest on their own? Mr. Greene stated any committee launched in the course of this process would have a job description outlining their roles and responsibilities that would be reviewed by a member of City staff prior to its dissemination. There's also a work program that was included in their response to the RFP which will be revised to outline those roles in more detail.

He stated they usually think of a Steering Committee as having roles in both the process and substance of the plan's development. For instance, the number of meetings they need to conduct; where and how they should be conducted, and the type of messaging needed that will motivate people to get involved in the process. When it comes to substance, that's where the committee would help them determine what issues need to be addressed and what questions need to be answered in their research. The committee would also act as a sounding board that helps guide his team in the right direction.

Councilmember Cusick stated U City already performs most of the items listed on the slide illustrating the Strategic Plan Process Cycle, so he's not sure he has a clear understanding of its purpose. Are you suggesting that your team would step in to help coordinate these activities and make sure all of these plans fit together smoothly? Mr. Greene stated the slide was intended to be an illustration of their understanding of exactly how all of these different components are connected to the Comprehensive Plan. Its purpose was to illustrate the answer to; what do we do with it? He stated it's not necessarily what U City needs to do, and it's not something this team is going to do for the City. It's simply a push to make sure that once the process is complete you have a clear understanding of how to integrate and institutionalize your plan in all of these areas because it should be a critical ingredient in your policy-making decisions.

Mr. Hively stated in Montgomery, Alabama economic development is contracted out to their Chamber of Commerce. And in the process of developing their Comprehensive Plan something that became very obvious was a need to place greater concentration on their neighborhoods and community development, for which they had no resources or entities readily available to address. So the team spent two days talking about what they were being asked to do; how it would be deployed; how this need would factor into their plan, and going through their budgets; up to and including potential options to amend their Capital Improvement Plan. Because up until this point, basically nothing was really getting done with the little money they had and there were no tangible physical improvements.

Once they reached the stage where Montgomery realized how they could concentrate this money in a few places to demonstrate that they could pull these improvements off; perhaps, at a block level or streetscapes and housing improvements, the next step was to determine how it would get done. What they discovered is that the City had a dormant CDC that had been sitting idle for close to 30-years. That discovery manifested itself into contract negotiations with the Chamber which allowed them to take on the role of community development.

Mr. Greene stated Montgomery had been without an Updated Comprehensive Plan for 57 years. And through an engagement process similar to what is being described here they were able to hold an event at Alabama State University where over 500 people were in attendance. The significance is that half of the attendees were comprised of African-Americans who had never attended a public meeting. It was an extraordinary effort led by their Steering and Outreach Committees, who composed the right kind of message to create a feeling that everyone was welcome to participate in the process.

Mr. Hively added that their Comprehensive Plan; which is still in place and viewed as a governing City document includes representations of land use by race; today, there are still segregated parts of Montgomery.

Councilmember Clay stated he really appreciates the comments about the 3rd Ward, and wonders if the team could talk a little bit about the process in their Proposal on page 28, which speaks to collateral, communication, and their web-based tools for engagement. Because while he thinks some of this might be very relevant to certain segments of the City's population, it might not be relevant to others; particularly those residents in the 3rd Ward who he believes are going to need different modalities to get them involved in this process. Mr. Greene stated their process includes the possibility of creating a toolkit because no one technique or tool will satisfy all 35,000 residents. Some people will be comfortable coming to a public meeting; others to a small group setting like a focus group, and some will be excited about the opportunity to participate via the internet. So they develop a range of techniques and let people know that those choices exist.

Councilmember Clay asked if the collateral was designed to support those templates and processes related to communication? Mr. Greene stated some of these questions will be answered during the course of the process. However, it is common practice to form some type of committee because one of the first steps is to learn what kind of messages will motivate people to get involved. And after examining those messages, as well as the assets that can be leveraged, or even gaps in those assets, they will put together a communication's plan that will establish a campaign about the future of U City.

Here is an example that is a bit awkward to share, but several years ago the Metropolitan Washington Council of Governments, which is comprised of D.C. and seven other counties in and around D.C. asked for their assistance to initiate an engagement process about the future of transportation. The generic brochure and message focused on getting there; transportation choices for the future. Soon thereafter, his team met with a leadership group from Anacostia; a disenfranchised neighborhood, and conducted an exercise to get their perception of the message. They rejected it and designed another message with a picture of a Washington Transit Authority bus that said: *"Don't get caught on the back of the bus; get engaged"*. And even though the client took their name off of that message, it demonstrates an effort to calibrate a message to a specific group based on their view of the situation, not what we thought would work. And if you want young people involved, then you'll probably need a different message and collateral.

Councilmember Clay asked how the Steering Committee, Outreach Committee, Ambassadors, and the City's Plan Commission would all fit together? Mr. Greene stated the term *"Ambassadors"* was meant to be used generically, it's a role that any of those committees could play. But part of this will come from the answers the committee provides on what the City has done before, and which of those actions were the most impactful? In some communities, the Planning Commission serves as the Steering Committee, or a Steering Committee is put together with members of the Planning Commission, or it could be that the Outreach Committee performs certain aspects of the Steering Committee's job description.

So I guess, if there was an organizational chart it would be the Plan Commission, the Steering Committee reporting back to them, and the Outreach Committee being a subset of the Steering Committee. But the reality is these are merely suggestions. This has to be a collaboration to make sure the approach is focused on what works best for U City.

Councilmember Smotherson stated the one slide that caught his interest was the Company's experience with Anchor Institutions. In those scenarios did the cities or the universities bring their Company into the process? Mr. Greene stated in most cases they were hired by the local governments and through that process, the universities got involved.

Tuscaloosa's committee was chaired by a senior leader at the University of Alabama and three other employees. In Dayton, their client was the University of Dayton and another anchor institution interested in expanding their community agendas. Councilmember Smotherson asked what happens when a university is not necessarily willing to get engaged? Mr. Greene acknowledged that they had experienced that in some cases.

Mr. Hively stated from the list provided;

- Burlington, VT was a combination of the University and the City.
- Tuscaloosa, AL the University of Alabama was a part of the process.
- New Haven, CT was all over the place, but they were originally hired by the City.
- Providence, RI the project was initiated by Brown and leadership of the HELP Coalition.
- Philadelphia, PA was a joint project with the City, UPENN, and CHOP to develop a very specific industry that required a joint collaboration by all three institutions.
- College Station, TX, Texas A & M was a reluctant partner.
- Mansfield, CT, UCONN was a reluctant partner.
- Richardson, TX, the University of Texas-Dallas was a reluctant partner.

The reality is that every university is different, and yet, they are all the same. While it's true that public universities engage in a different way than private universities, at the end of the day, you have to look for places where there is an aligned self-interest. That's really the key because if it's adversarial and there is no aligned interest, it won't go anywhere.

So the question really becomes where can you leverage some of your authorities to align your own self-interest? In the case of Rhode Island, the former mayor understood the power of his office and the ability to control certain things, and institutions began to realize that they had to come to the table. But that only works for about an hour, and then you've got to figure out where you can align self-interest. It's not institutional welfare, it's literally self-interest.

Mr. Greene stated like everything they've talked about here tonight, all of this has a context and a history that must be understood in order for them to determine how to move forward. Unfortunately, one of the hardest obstacles to overcome is a memory about certain things; especially when it deals with institutions that are reluctant to participate.

Mayor Pro Tem Carr stated she would like to dig in on this aligned institutional self-interest because many institutions do not have a state charter, meaning that some of their buildings are regarded as educational and therefore, taken off the tax rolls. U City has this very unique situation; which actually might be parallel to what's happening at Yale since Wash U considers itself to be an Ivy League institution. So quite frankly; and with the deepest respect, she does not understand what Mr. Hively is saying. She stated she has been dealing with this situation for about ten years and does not know how you come together to have a shared interest, much less an aligned self-interest when one partner has such a strong hand and the other has very little. Mr. Greene stated this is the type of conversation that should probably be discussed in a different setting. Mayor Pro Tem Carr stated in her opinion, this conversation is integral to the City's Comprehensive Plan. Mr. Greene stated while he certainly understands that point of view, he would caution the City to think long and hard about how much this town-gown relationship question governs how the plan unfolds since you could end up losing sight of the forest because of all the trees. He stated he recognizes the issue around resources, which makes this a really tough question because it involves pilots, taxes and other things of that nature.

Mayor Pro Tem Carr stated what she's talking about is paying their fair share, either in a pilot or some other form because based on her observations there is a shifting of financial responsibility to the taxpayers. U City is a very economically diverse community and quite frankly, it infuriates her when she hears that some of her constituents have to choose between flood insurance and food on their tables when essentially, they are underwriting these services to this private, exclusive, and wealthy institution. It's something that she simply does not know how to bridge. And any plan they decide on is going to have to take that relationship and its impact on the City's future and sustainability into account.

Unidentified Commissioner: Wash U is one of the largest landowners in the 1st and 2nd Wards. They do not pay taxes on that land, and that directly impacts the services this City is able to provide to their residents.

Mr. Greene stated while they understand this is a very significant issue, on a positive note, what they've seen in a lot of planning efforts like this, is that it can be another opportunity to reopen those conversations and address some of these issues. However, since Mayor Pro Tem Carr has been focused on this for ten years, he's guessing this is something that cannot easily be addressed in the Comprehensive Plan. Nevertheless, since he knows nothing about the University's leadership, whether there have been regular conversations, or if it's basically a closed-door, his hope is that this process can be used as a mechanism to reignite those conversations and talk about these things. But here again, what you've described is not uncommon in a lot of communities.

Mr. Hively stated if this was a public institution you would not even be having this conversation because you have almost no control over that situation.

Unidentified Commissioner: A key factor is that Wash U is a private institution.

Mr. Hively stated he understands that they are which is why the City does have certain avenues to explore. He stated he thinks Jamie's point about how the planning process unfolds different kinds of regulatory and zoning mechanisms could play a major role.

Mr. Greene stated not knowing the players, he's not sure whether this suggestion will make a difference, but perhaps, someone on the Steering Committee would be willing to play a leadership role to learn more about what options might be available. Of course, as he said earlier, this dynamic is different in each city. Texas A & M in College Station and some of the larger State institutions don't really care much about their host community. It's strange to see what has and is continuing to happen to an institution with 68,000 students. They could have a tremendous impact on the community but they've constantly struggled to get the right leadership in place to make those conversations happen.

Mr. Hively stated to Jamie's point about that leadership role on the Steering Committee, what you need to know is that the assistant associate deputy dog whose job is to go to meetings is not the person you want to have these conversations with. And what happened in one of their projects is that the City Manager, Council president, and the Mayor eventually had to say, we need someone who has some authority, and that request ended up going all the way to the Provost, who actually got involved.

Mayor Pro Tem Carr stated that's an approach that has already been undertaken.

Mr. Greene stated he saw some amazing neighborhoods during his tour of the city today and one trend they are seeing at a lot of universities employ is to attract and retain faculty by promoting quality neighborhoods that are in close proximity to their campus. Maybe they don't need that kind of an asset, but if they do, it's the type of influencer they could work to put a finer point on as a part of the process.

Mayor Pro Tem and Mr. Cross thanked everyone for tonight's presentation.

Mr. Rose asked members of Council and the Commission if they would reconvene in about two minutes to talk about the next steps.

3. ADJOURNMENT

Mayor Pro Tem Carr adjourned the Joint Study Session at 8:20 p.m.

LaRette Reese
City Clerk

