Economic Development Advisory Board Regular Meeting

Agenda

July 9, 2024 @ 8:15 AM

City Hall Commission Chambers
401 S. Park Avenue

welcome

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assistance & appeals

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"If a person decides to appeal any decision made by the Board with respect to any matter considered at this hearing, a record of the proceedings is needed to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based." (F.S. 286.0105).

please note

Times are projected and subject to change.

1. **Call to Order**
2. **Consent Agenda**

a.	Approve the minutes of June 11, 2024	1 minute

3. **Public Comments (for items not on the agenda): Three minutes allowed for each speaker**
4. **Action Items**

a.	Agreement with The Center for Micro-Entrepreneurial Training (CMET)	15 minutes

5. **Non-Action Items**

a.	MJB policy change recommendations	15 minutes
b.	Board Prioritization Discussion	45 minutes

6. **Staff Updates**

a.	EDAB Commercial Performance Report	5 minutes
b.	Generic WP Banners	5 minutes

7. **Board Comments**
8. **Upcoming Agenda Items**
9. **Adjournment**

Economic
Development
Advisory Board

agenda item
2.a

item type	**meeting date**
Consent Agenda	July 9, 2024
prepared by	**approved by**
Bahiyyah Muhammad-Layton, Board Coordinator	Peter Moore, Director of Office of Management and Budget

subject
Approve the minutes of June 11, 2024

motion | recommendation
Approve as presented

background

alternatives | other considerations

fiscal impact

attachments
1. EDAB-mins-2024-06-11 DRAFT

Economic Development Advisory Board
Regular Meeting Minutes

June 11, 2024 at 8:15 AM

City Hall Commission Chambers
401 S. Park Avenue

Present
Sarah Grafton, Roda Carter (left at 8:37 a.m.), Steven DiClemente, Phil Anderson,

Absent
Kevin McClanahan, Lauren Zimmerman

Staff Present
Assistant Division Director of Economic Development and CRA Kyle Dudgeon, CRA Coordinator Anne Sallee, Board Coordinator Bahiyyah Layton

1. Call to Order

Sarah Grafton called the meeting to order at 8:19 a.m.

a. Board member introductions

Mr. Dudgeon initiated the introduction of new Board members and announced that Elijah Noel had moved out of Orange County and is no longer eligible for the Board. Mr. Dudgeon thanked him for his service. Mr. Anderson introduced himself as the former Mayor and his focus with EDAB will be on making the residents' lives better. Ms. Grafton suggested that Mr. Anderson become Chair of the Board.

2. Selection of Chair and Vice Chair

Motion made by Mr. DiClemente to nominate Phil Anderson as Chair, seconded by Ms. Grafton, Mr. Anderson accepted, agreed by consensus. Motion made by Mr. DiClemente to nominate Sarah Grafton as Vice-Chair, seconded by Mr. Anderson, Ms. Grafton accepted, agreed by consensus

3. Consent Agenda

a. Approve the minutes of May 14, 2024

Motion made by Mr. Anderson to approve the minutes, seconded by Mr. DiClemente . Motion carried unanimously with a 4-0 vote.

4. Public Comments (for items not on the agenda)

5. Action Items

6. Non-Action Items

Mr. Dudgeon acknowledged the Board's efforts in supporting small business development and entrepreneurship. Most recently, through a partnership with the National Entrepreneurship Center, questions have arisen as to what could be improved upon to develop the Winter Park resident small business owner. Staff looked at other models that would support the Winter Park Business Academy, including surveying current participants. Mr. Dudgeon introduced Mr. Simmons from CMET.

a. Presentation: Joseph Simmons of The Center for Micro-Entrepreneurial Training (CMET)

Mr. Simmons thanked the Board for inviting him to present the Center for Micro Entrepreneur Training (CMET). The organization was founded in 2020 with the basic concept of preparing entrepreneurs for success. Entrepreneurs need five things: understanding business financials, ecommerce, sales, how to communicate their business to others and coaching. The result of the program, is an elevator pitch and a keynote speaker. Last year, with five cohorts, 109 business owners completed the program. In 2024, the goal is to train 150 entrepreneurs and to also facilitate an entrepreneurial academy in Winter Park. The business academy will have structure, a starting point and end point.

Ms. Carter left the meeting at 8:37am

Mr. Simmons explained the pre-program activities from June to August would include marketing & advertising, application, vetting and selection. From August through the next 6 to 8 weeks, the core of the program will take place; program delivery, financial information and future planning. At the end, a debrief would take place, financial reviews, a survey and also next steps. There are two pathways to decide, the 6 week program or the full 9 week program. The partial program is $23,650K and full is $28,300K.

Mr. Anderson verified that funding had already been approved and no additional approvals. Mr. DiClemente questioned the start-up costs and if the SCORE mentors would come from Winter Park. Ms. Grafton asked how many entrepreneurs the program would include and how the program would target Winter Park entrepreneurs. Mr. Simmons answered Mr. DiClemente's questions and recommended not going over 35 participants. The applicants are vetted, and Google ads will target Winter Park along with word of mouth networking. Ms. Grafton suggested the participants network with

Winter Park business owners. Mr. Anderson stated that he would like the program to target existing businesses that struggled during COVID because the Winter Park businesses that thrived during the pandemic had ecommerce strategies. Mr. Simmons suggested that those businesses that thrived could speak with the participants during the ecommerce and AI sessions of the program.

Mr. Dudgeon advised that Staff will take the discussion points into consideration and add them as an action item on an upcoming agenda. Mr. DiClemente asked if Staff will be strained with another program. Mr. Dudgeon advised that the City is paying for expertise and will rely on Mr. Simmons and his team to provide the expertise. Staff will assist Mr. Simmons in the coordination and administration of the program. The suggested location for the program would be the Winter Park public library.

7. Staff Updates

a. EDAB Commercial Performance Report

Mr. Anderson asked if there were any questions regarding the Commercial Performance Report. Ms. Grafton asked Mr. Dudgeon if there were any noticeable changes. Mr. Dudgeon explained the two outlier points on the rental rate graph. Mr. Dudgeon answered questions on the monthly traffic graph and was advised by Mr. Anderson to change to a year-over-year graph.

8. Board Comments

Mr. Anderson recommended a meeting with the board members early in the term of the board to speak about priorities. Mr. Anderson asked Mr. Dudgeon to distribute to the Board members, the economic development guidance list and the two page overview of the retail report completed by retail consultant MJB.

9. Upcoming Agenda Items

10. Adjournment

The meeting adjourned at 9:20 a.m.

Approved by the board on
/s/ Bahiyyah Layton, Board Coordinator

Economic
Development
Advisory Board

agenda item
4.a

item type
Action Items

meeting date
July 9, 2024

prepared by
Kyle Dudgeon, Assistant Division Director of Economic Development/CRA

approved by
Michelle del Valle, Assistant City Manager

subject
Agreement with The Center for Micro-Entrepreneurial Training (CMET)

motion | recommendation
Motion is at the pleasure of the board

background
At the March and June 2024 EDAB meeting, board members suggested that while the Winter Park Business Academy (WPBA) was achieving success, staff should research the opportunity for Winter Park to add to its portfolio for entrepreneurship development. This also included context of previous board discussions regarding feeder systems to the WPBA and how to engage once businesses completed the mentorship coursework. Ultimately, staff was asked to research this type of program and presented the Center for Micro-Entrepreneurial Training (CMET). After a presentation, staff was requested to bring back a contract for consideration. Deal points include:

<u>Direction to CMET/Joe Simmons:</u>

- Please provide a contract for the 10-week session at $28,300.
- Please include an alternative clause or out clause, which reflects payment for only work to date and timeline, should marketing efforts fail and produce a low enough cohort not to proceed.
- Provide a draft communication or reporting schedule to the city.
- Please include language that allows the City a controlling interest in promoting particular business segments as part of the vetting and selection process for the cohort.
- The contract should elaborate on responsibilities for marketing efforts by CMET (separate from CRM collections by the City through its Winter Park Business Academy program).
- CMET shall work with the city on the application process to include 'skin in the game' incentives to ensure commitment of applicants.

- Ensure applicants are provided a certificate post completion of the program.
- List any additional assistance you anticipate you'll need from the City.

Responsibilities of the City/OMB team:

- Provide consistent venue
- Input on recommended application and application process to ensure business types are consistent with EDAB goals (pending large application pool).

Staff is providing the presentation from the June meeting for reference on timing and schedule.

alternatives | other considerations

Amend the proposal
Do not consider the proposal

fiscal impact

$28,300 from American Rescue Plan Act funds

attachments

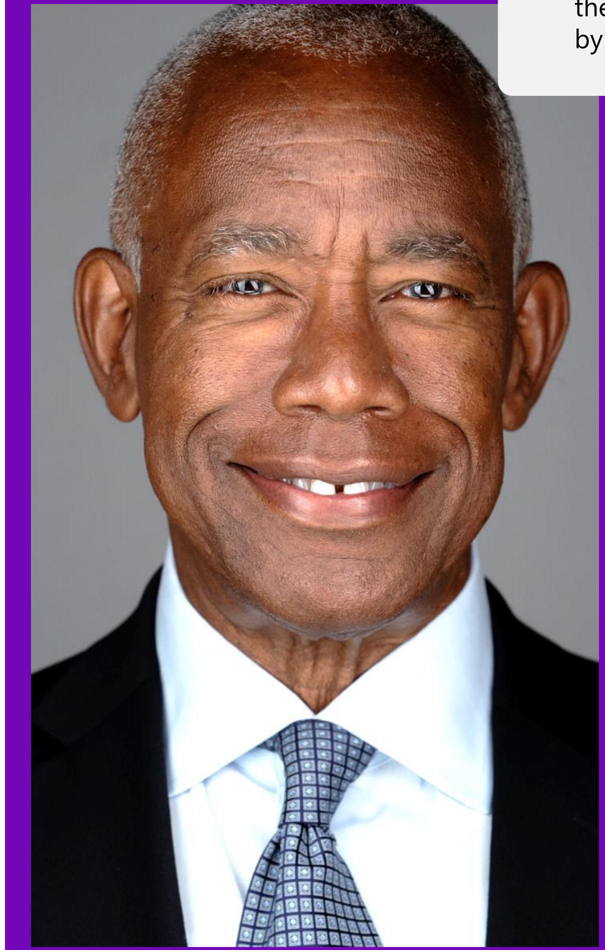
1. CMET WPBA May 2024 vrev

CMET

Center for Micro-Entrepreneurial Training

TABLE OF CONTENTS

WPBA PROPOSAL



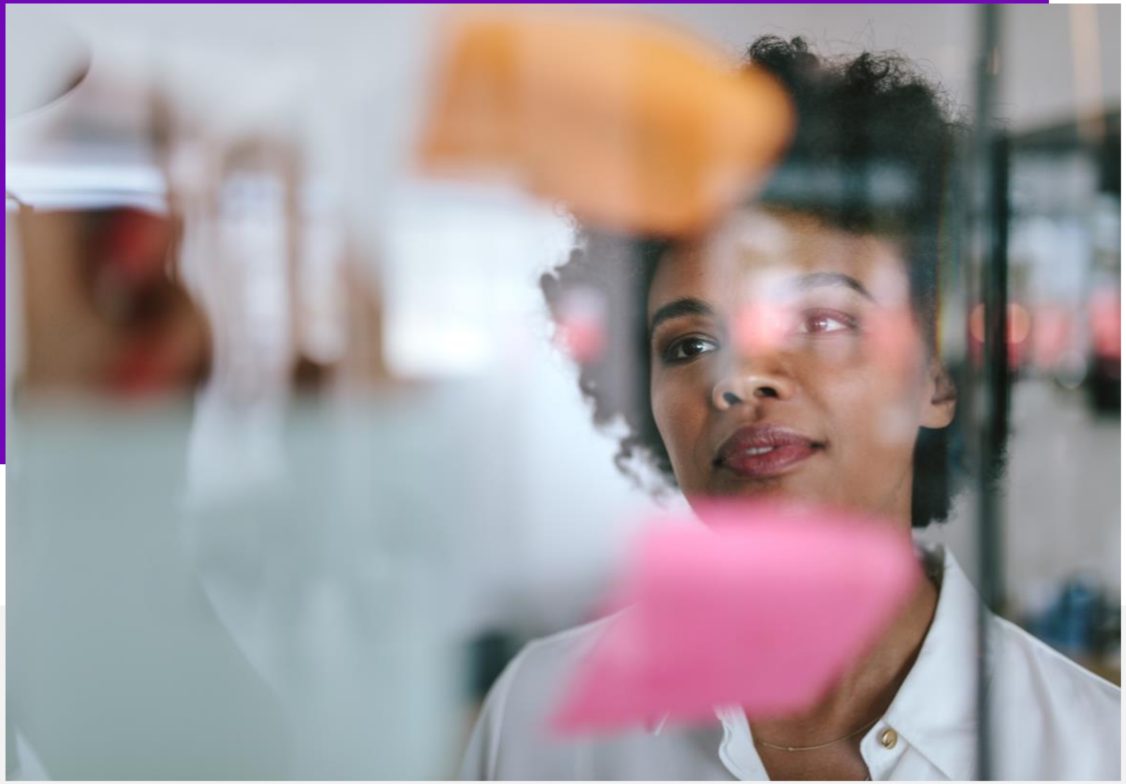
"To inspire your entrepreneurs, you'll have to talk to them. I love short - five to 10-minute) huddles in sessions to align them and the team. One effective way to begin or end is by sharing my experiences.

Joseph A. Simmons, Founder & CEO

INTRODUCTION

Joseph Simmons is a seasoned pharmaceutical executive and philanthropist in Orlando, FL. With a successful career spanning several decades, Joseph has held top management positions at leading pharmaceutical companies, including Baxter Corporation, Johnson & Johnson, Sunrise Medical, Knoll, Abbott, and Novartis Pharmaceuticals.

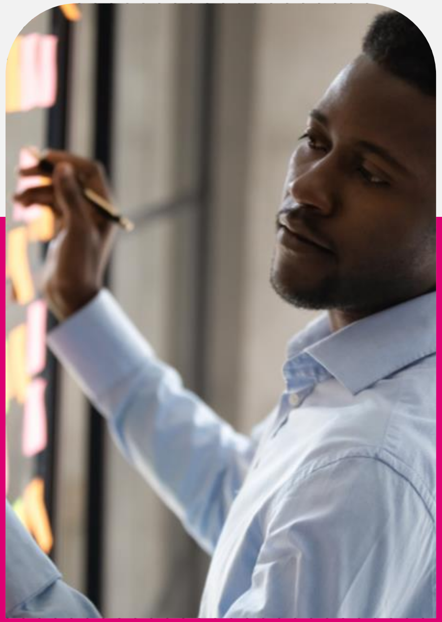
In May 2020, Joseph founded The Center for Micro-Entrepreneurial Training (CMET), a nonprofit organization dedicated to empowering women and black and brown entrepreneurs to start and grow their businesses. Through high-quality entrepreneurial training and support, CMET helps these aspiring entrepreneurs acquire the skills and knowledge necessary for success. The organization's overriding goal is to prepare, connect, and support these entrepreneurs for long-term success and a positive impact on their communities.



ABOUT US

OUR MISSION, VISION & VALUE PROPOSITION

Our mission is to prepare black and brown entrepreneurs for business success.



Enhancing the talent, skills, and knowledge of innovators, entrepreneurs, and business owners to impact every community in the United States for generations.

Our core principle is to value every human who strives to build a better world through business creation with integrity, respect, accountability, social responsibility, diversity, and inclusion.

CMET GAP
STRATEGIC ADVISORS

We are committed to fostering the growth and success of micro-entrepreneurs, and the EBA is an essential part of that mission.

Our instructors are seasoned professionals in their fields, with years of experience in entrepreneurship and business management.

They provide practical tools and strategies to apply to businesses, giving them a competitive edge in the market.

Servola Frazier
Motivate Enterprises, LLC

Michelle Chenault
M Chenault Management Consulting, LLC

Christina Lynch
Trydent Consulting

Karen Vick
Guiding Brands

Jarvis Gray
The Quality Coaching Co.

Randolph Dukes
NorthStar Innovations, LLC

Bethanie Nonami
Marley Nonami Incorporated

OUR PROGRAMS

CMET ENTREPRENEURIAL TRAINING PROGRAM

- 5-Day Virtual Entrepreneurial Accelerator
- Focus on the 5 Pillars of Entrepreneurship
- 12 Subject Matter Experts
- Elevator Pitch Contests
- Keynote Speakers

CHERYL MCDUFFIE JAMES

OUR PROGRAMS

CMET GAP
STRATEGIC ALLIANCES

- Lift Orlando Economic Development
- Orlando Black Chamber
- Atlanta Black Chambers
- Ignite!
- Microsoft
- Google Ads

CMET JP MORGAN CHASE:
GAP SUCCESS STORIES

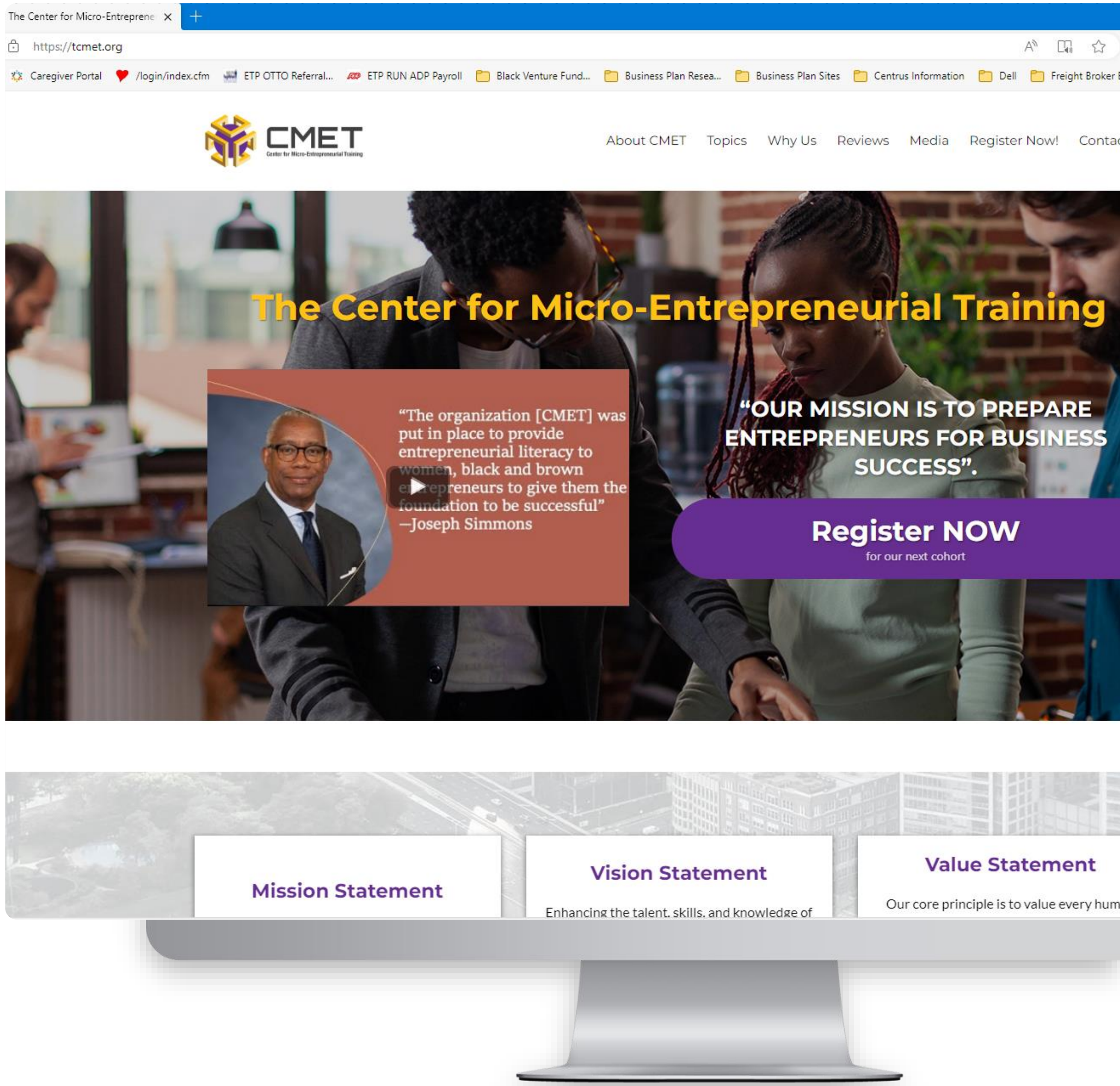
Keaidy Bennett, LexxiKhan Presents

Jany Borges, Amakai Consulting

Delinda Davis, Delinda Davis Designs

CMET 2023 HIGHLIGHTS

- Engagement - Five Cohorts
- Completion - 109 Business Owners'
- Expansion - NEW! CMET/JP Morgan Chase GAP
- Started July 2023
    - Vetted & started12 entrepreneurs
    - Added two CMET and two JPMC Advisors
- Facilitated the Lift Orlando Small Business 8-week cohort
- Achieved a 5.0 Star rating on Google reviews



THE WAY FORWARD: CMET GAP 2024

- Add four for a total of six Strategic Business Advisors
- Using a CRM: Marketing Innovations Automation (MIA)
- Improving the vetting process with an outside advisor
- Anticipating 20% of the EBA graduates enter the GAP Program
- Seeking a 2024 Operating Budget $180k

CMET
Center for Micro-Entrepreneurial Training

CMET 2024 OBJECTIVES

- Conduct six (6) EBA Sessions
- Train 150 entrepreneurs in 2024
- Secure operating and funding objectives
- Continue to develop the GAP Program
- Collaboration with Rollin' Crummer Center for Advanced Entrepreneurship CREA program
- **<u>Facilitate an EBA Session in the West Winter Park area</u>**
- Launch 5-Day EBA Virtual Sessions
- Launch AI-powered Learning Management System
- Launch a Government Contracting workshop
- Launch a Nonprofit Management workshop

WPBA

WINTER
PARK
BUSINESS
ACADEMY

CMET
Center for Micro-Entrepreneurial Training

National Entrepreneur Center

CITY OF WINTER PARK, FLORIDA
ESTABLISHED 1882

WINTER PARK BUSINESS ACADEMY

Our timeline can be divided into three main sections: **Pre-Program, Program, and Post-Program** activities.

1. **Pre-Program:** This phase involves all the preparation activities before the main program begins. It includes tasks such as planning, participant registration, logistics, and communication with stakeholders.

2. **Program**: This is the core phase of the timeline where the program's main activities, sessions, and events occur. It encompasses workshops, presentations, discussions, networking sessions, and other planned activities to achieve the program's objectives.

3. **Post-Program**: After the program concludes, the post-program phase focuses on activities to evaluate the program's effectiveness and implement any follow-up actions. It may involve conducting surveys, organizing debriefing sessions, providing resources or support to participants, and documenting lessons learned for future improvements.

WPBA PROGRAM TIMELINE

JUN '04 – AUG '04	AUG '04 – NOV '04	NOV '04 – JAN '05
Pre-Program Activities	**Program Activities**	**Post-Program Activities**
Marketing & Advertising	Weekly Program Delivery	The Way Forward
Application	Financial	
Vetting	Future Planning	
Selection		

WINTER PARK
BUSINESS ACADEMY

Here's a list of **Marketing Distribution Channels** that CMET uses to reach its target audience effectively:

1. **Marketing Innovations Automation (MIA):** Our all-in-one Marketing and CRM platform is used to build, manage, and scale our business and share success stories.
2. **Social Media:** We use Facebook, Instagram, LinkedIn, and YouTube to drive targets to our website.
3. **CMET Website:** A well-designed, SEO-optimized, funnel-enabled website with information about training programs, schedules, registration, success stories, etc.
4. **Email Marketing**: Used to engage registrants and inform subscribers about course updates and special promotions.
5. **Virtual Courses, Webinars, and Online Workshops**: Recorded sessions and workshops for micro-entrepreneurs beyond the EBA.
6. **Networking Groups**: Forming or joining local networking groups for small business owners and entrepreneurs.
7. **Local Outreach**: Speaking engagements at local community centers, schools, and universities. Volunteering and participating in local community initiatives.
8. **Referrals and Word of Mouth**: Encouraging satisfied participants to refer friends and family and leveraging Partners' social media channels as well.

By leveraging a mix of these online and offline channels, CMET can effectively reach and engage its target audience, fostering growth and participation in its programs.

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Center for Micro-Entrepreneurial Training

WINTER PARK
BUSINESS ACADEMY

Here are the steps in our **Application, Vetting, and Selection** process to ensure the "right fit" of entrepreneurs are taking part and will likely move to post-program activities:

Application Process:

- Publicize the application process through various channels.
- Provide clear information about the program, eligibility criteria, application deadlines, etc.

Application Submission

- Provide an online application form or downloadable application documents.
- Collect necessary details such as personal and business information, qualifications, experience, etc.
- Require supporting documents like resumes, financials, one-page business plans, etc.

Confirmation of Receipt

- Acknowledge receipt of applications via email or a confirmation page.
- Provide applicants with a timeline and next steps.

Vetting Process:

- Review applications for completeness and adherence to eligibility criteria.
- Filter out incomplete or ineligible applications.

Detailed Review

- Assess the remaining applications against predefined criteria.
- Evaluate qualifications, experience, motivation, and potential fit for the program.
- Use CMET's scoring system or rubric to ensure consistent evaluation.

Background Checks (if applicable)

- Conduct background checks and reference checks and verify provided documents (e.g., educational qualifications and work experience).

Evaluation & Selection Process:

- Create a shortlist of top candidates based on the detailed review and background checks.
- Schedule interviews (in-person, phone, or video) with shortlisted candidates.
- Review and compare candidates' overall performance and fit for the program.

Selection Decision

- Choose the best candidates based on the combined results.
- Notify selected candidates of their acceptance and provide details on the next steps (e.g., enrollment, orientation).
- Inform non-selected candidates politely and professionally, offering feedback if possible.
- Confirm acceptance from selected candidates.
- Provide onboarding information to ensure a smooth transition into the WPBA program.

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WINTER PARK BUSINESS ACADEMY (PARTIAL)

- Week 1: Customer Discovery
- Week 2: Business Planning
- Week 3: Financial Literacy
- Week 4: Sales & Customer Acquisition
- Week 5: Legal & Ethical Aspects
- Week 6: Building & Scaling Your Business
- Week 7: Presentation & Graduation!

PROGRAM OBJECTIVES:

The WPBA is intended to empower the entrepreneurial journey through in-person events where inspiration meets actionable insights.

Whether attendees are up-and-coming entrepreneurs with groundbreaking ideas or seasoned business owners poised for growth, the WPBA will unlock the keys to their success.

Through this partnership, attendees will gain practical skills, access valuable resources, and pitch their vision to potential collaborators and investors.

Let's ignite innovation, foster collaboration, and accelerate the entrepreneurial path to success together.

WINTER PARK BUSINESS ACADEMY (FULL)

PROGRAM OBJECTIVES:

The WPBA is intended to empower the entrepreneurial journey through in-person events where inspiration meets actionable insights.

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CMET
Center for Micro-Entrepreneurial Training

WINTER PARK BUSINESS ACADEMY SMEs

We are committed to fostering the growth and success of micro-entrepreneurs, and the EBA is an essential part of that mission.

Our SMEs are seasoned professionals in their fields, with years of experience in entrepreneurship and business management.

They provide practical tools and strategies to apply to businesses, giving them a competitive edge in the market.

Wendy Carter
Customer Discovery

Michelle Chenault
Business Planning

Michele Moss
Legal Essentials

Dr. Tracy Kizer
Guiding Brands

Chistina Lynch
Financial Literacy

TD Bank
JPMorgan Chase & Co.
SouthState
TRUIST

TDBank/JPMChase/SouthState/TRUIST
Funding/Finance

Alonzo Williams
Building/Scaling

CMET
Center for Micro-Entrepreneurial Training

SCORE
FOR THE LIFE OF YOUR BUSINESS

WINTER PARK BUSINESS ACADEMY

Following this outline, CMET can ensure a smooth and effective transition of WPBA graduates to SCORE's business mentorship program, fostering sustained business growth and development.

Introduction

- Transition purpose and overview of SCORE transition
    1. To provide continued support for WPBA graduates
    2. To leverage SCORE's mentorship resources for business growth
    3. National network of experienced business mentors
    4. Services offered: mentoring, workshops, resources

Preparation Phase

- Informing and consent of WPBA Graduates
    1. Announce the transition opportunity at the final WPBA sessions
    2. Provide detailed information about SCORE and its benefits
    3. Obtain permission from graduates to share their contact information with SCORE
    4. Ensure graduates complete any required forms for SCORE's intake process

Coordination with SCORE

- Establish Activities & Transfer of Information
    1. Designate liaisons from both organizations for smooth communication
    2. Share relevant details of WPBA graduates with SCORE mentors

Introduction WPBA Graduates to SCORE Mentors

- Matching Graduates with Mentors
    1. Identify suitable mentors based on graduates' business goals and needs
    2. Facilitate initial introductions via email or introductory meetings
    3. Organize an orientation session for graduates to learn about SCORE's mentoring process
    4. Provide resources and contact information for additional support

CMET's Ongoing Support and Follow-up (if applicable)

- Support and Service Activities
    1. Address any issues or concerns regarding the mentorship experience
    2. Gather feedback from both graduates and SCORE mentors
    3. Use feedback to improve the transition process and address any gaps

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WINTER PARK BUSINESS ACADEMY (PARTIAL)

START UP WORKSHEET

Initial startup costs include CMET material and active involvement in developing, managing, and sustaining a viable and effective program.

The fall session will be sponsored by funds from the National Entrepreneur Center and the City of Winter Park to ensure the organization starts correctly and gains credibility quickly.

The CMET will rest on their leadership, knowledge, experience, professional relationships, and an expert consultant to execute WPBA's programs and services.

Requirements	**Amounts**
Start-up Expenses	
Trainers & Speakers Compensation*	4,400
Materials & Supplies	500
Technology & Equipment	0
Marketing & Promotion	2,000
Consultation Fee (Preparation/cohort)	10,000
Program Governance & Administrative Costs	3,000
Refreshments, Catering & Meals	2,500
Miscellaneous Expenses	1,250
Total Start-up Expenses	$23,650

CMET
Center for Micro-Entrepreneurial Training

WINTER PARK BUSINESS ACADEMY (FULL)

START UP WORKSHEET

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Requirements	**Amounts**
Start-up Expenses	
Trainers & Speakers Compensation	6,050
Materials & Supplies	500
Technology & Equipment	0
Marketing & Promotion	2,000
Consultation Fee (Preparation/cohort)	13,000
Program Governance & Administrative Costs	3,000
Refreshments, Catering & Meals	2,500
Miscellaneous Expenses	1,250
Total Start-up Expenses	$28,300

START UP NOTES (PARTIAL)

We aim to secure approximately $23,650 for planning, consulting, and technical execution during the startup phase and for managing, delivering, and administering the WINTER PARK BUSINESS ACADEMY program for nine months ending January 2024. The startup phase starts officially on Monday, June 17, 2024, and “rolls out” on Tuesday, August 20, 2024.

Our financial plan is contingent on the following assumptions:

- We assume the current social call to action to address long-standing issues for entrepreneurs in Winter Park and the surrounding Central Florida areas will continue.
- We assume we have acquired funding, and the WPBA will transition from the Startup to the Execution by August 2024.
- We assume our funding, technical assistance, training, and educational programs will receive broad community support from like-minded stakeholders, partners, and volunteers, and they will actively financially participate.

START UP NOTES (FULL)

We aim to secure approximately $28,300 for planning, consulting, and technical execution during the startup phase and for managing, delivering, and administering the WINTER PARK BUSINESS ACADEMY program for nine months ending January 2024. The startup phase starts officially on Monday, June 17, 2024, and “rolls out” on Tuesday, August 20, 2024.

Our financial plan is contingent on the following assumptions:

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THANK YOU

CMET
Center for Micro-Entrepreneurial Training

Economic Development Advisory Board

agenda item 5.a

item type
Non-Action Items

meeting date
July 9, 2024

prepared by
Kyle Dudgeon, Assistant Division Director of Economic Development/CRA

approved by
Peter Moore, Director of Office of Management and Budget

subject
MJB policy change recommendations

motion | recommendation
Recommend bringing back to the next board meeting for approval

background
At the conclusion of the MJB retail study, the consultant provided several recommendations for policy, program, and incentive related initiatives. Included as part was an update to C-2 zoning to encapsulate the 'omni-channel' nature of retail businesses (e.g. marketing, selling services and goods, customer experience, etc.). The background for the suggested change is included as an attachment to this title sheet. Also included are the suggested revisions to the section of the code for review. Section revisions have been coordinated and reviewed with planning staff to date. Moving forward staff is seeking additional commentary by the board prior to insurance as an action item and ultimately consideration by Planning & Zoning and the City Commission.

alternatives | other considerations
Amend the changes
Do not consider the changes

fiscal impact
N/A

attachments
1. City of Winter Park Retail Strategies
2. Updates to C-2 Zoning_EDAB_draft

Area – Bucket	Specific Action Item(s)	Time Horizon	Chief Sponsor(s)	Context/Commentary
C-2 Zoning – **ZONING**	Consider appropriate tweaks and adjustments to the Commercial (C-2) district (Sec. 58-75) for the commercial portion of the central business district as well as definitions particularly relevant thereto: 1. Simplify definitions of different kinds of eating and drinking establishments so as to align more closely with industry terminology and understanding; 2. Raise threshold for revenue from take-out orders to qualify as a fine-dining restaurant; 3. Allow for greater flexibility in changes to "core business" (i.e. mix of goods and services) before requiring a new application to the City (e.g. for business tax receipt); and 4. Prohibit "churches, nonprofit organizations' halls/ lodges and schools less than 5,000 sq. ft. in size)" in the ground-floor of properties having frontage on Park Avenue or along intersecting streets within 140 feet of Park Avenue.	Short Term (0-1 years)	City of Winter Park, with input and buy-in from the Winter Park Chamber of Commerce, the Park Avenue District and Park Ave landlords/ merchants.	Chief arguments for each of these proposed modifications are as follows: 1. The language used to define different kinds of restaurants—for the two worthwhile and appropriate goals of protecting against fast food in particular and avoiding a proliferation of restaurants more generally—is confusing and leaves too much room for discretion, deterring prospective tenants that long for clarity and predictability; 2. The current 10% threshold does not account for the growth in "off-premise" dining that took hold amidst the pandemic. According to data from the NPD Group, off-site consumption accounted for 33% at full-service restaurants nationwide (versus 19% pre-pandemic); 3. Making such tweaks too onerous risks hampering the ability of individual businesses to respond nimbly to shifts in consumer tastes and preferences, which helps to keep the overall mix fresh and current; and 4. These uses would remove precious ground-floor inventory that could otherwise be occupied by more synergistic tenants which add to Park Avenue's critical mass.

Sec. 58-75. Commercial (C-2) district.

(a) *Purpose and intent.*

(1) This commercial zoning district is limited to the commercial portion of the geographic downtown area known as the central business district and the similar commercial area of the city within the Hannibal Square Neighborhood Commercial District (HSNCD) of the city's community redevelopment area (CRA). As detailed in the comprehensive plan, commercial (C-2) district zoning is not permitted on any property except if it is within the central business district "potential C-2 zoning" area depicted in the CBD Map (D-2) in the definitions section, generally described as west of Knowles Avenue, south of Swoope Avenue, north of Comstock Avenue and east of and including the New York Avenue Corridor, or it is on properties abutting Morse Blvd between Capen and Virginia Avenues, abutting the south side of Morse Boulevard between Virginia and New York Avenues, abutting New England Avenue between Pennsylvania and New York Avenues, abutting Pennsylvania Avenue between Garfield and Lyman Avenues, or abutting Hannibal Square, East. No applications for C-2 zoning shall be accepted for any property outside these designated areas. Moreover, even properties within these designated areas shall have no vested right to C-2 zoning. This district has different requirements than other commercial areas, especially pertaining to setbacks, parking requirements, height limitations and permitted land uses, including a prohibition on drive-in businesses. This district is established to encourage the continuation of the present unique Park Avenue business district of the city and to provide for its use within certain other defined geographical areas as specified in the comprehensive plan.

(2) The regulations outlined in this district encourage the continuation of the present aesthetically pleasing central business district, provide areas for the concentration of compatible land uses, and provide for appropriate commercial, restaurant and residential uses which will strengthen the city's economic base.

(3) For purposes of this section, the Park Avenue Corridor is that area which encompasses those properties having frontage on Park Avenue or

(b) *Permitted uses.* All permitted uses shall be conducted so as to emphasize the pedestrian orientation of the district. Thus, drive-in-type businesses or uses which have a drive-in component as part of their operation shall not be permitted. All uses permitted shall be conducted exclusively within a building except those uses permitted which are customarily conducted in the open such as off-street parking and outdoor patio seating for dining. Storage shall be limited to accessory storage of commodities sold at retail on the premises and storage shall be within a completely enclosed building. Bars, taverns, cocktail lounges, and fast food restaurants are prohibited in this zoning district. In addition, no single tenant building larger than 65,000 square feet is permitted regardless if portions of such single tenant business, such as a grocery store, may have a sublease for an interior coffee shop, bank, etc.

(1) Retail businesses involved in the sale of merchandise on the premises within enclosed buildings but excluding resale establishments or pawn shops (other than clothing resale stores) and excluding vapor lounges, smoke shops, cigar stores and liquor stores.

(2) Personal services limited to hotels, and shoe/watch repair businesses but excluding places of amusement such as game rooms, video or internet arcades, tattoo, body art or fortune-telling businesses and the like.

(3) Banks, savings and loans, financial institutions, nonprofit organizations, travel agencies, photographic studios, interior design studios, barber shops, beauty/nail salons, spas, state-licensed massage therapists, cosmetic and skin care treatment businesses, governmental, educational, medical, real estate and other offices but only when such uses are located above the ground floor within the Park

Avenue Corridor or located on any floor outside the Park Avenue Corridor. This shall be referred to as the Park Avenue corridor vertical zoning restrictions.

(4) Residences located on any floor outside of the Park Avenue Corridor but only above the ground floor within the Park Avenue Corridor and on properties with frontage on New England Avenue between Pennsylvania and Park Avenues.

(5) Public and semi-private facilities such as museums, lodges, libraries and the like.

(6) Fine dining restaurants, as well as ice cream, tea, coffee, cheese, pastry and bakery stores with retail sales and consumption of food and beverage products on premises, except that only those restaurants satisfying the criteria set forth below shall be permitted uses in the Park Avenue Corridor.

a. *Fine dining restaurants.* To qualify for a permitted use, a fine dining restaurant must provide, and continually adhere to, a detailed written description of the business operations and plan layout of dining and food service areas to show the restaurant satisfies the criteria of section 58-95, fine dining restaurant.

b. ~~*Non-fine*~~*Fast casual* *dining restaurants.* Certain other restaurants (other than fast food restaurants, which are a prohibited use) shall qualify for a permitted use in the Park Avenue Corridor, provided that they satisfy the following criteria and do not exceed the percentages set forth in this section:

1. Upon a patron's request, on-site food and beverage service shall be provided via table service by servers;

2. Appropriate visible signage is provided to notify patrons of the availability of table service;

3. The menu consists of a variety of food options including pre-entree items (soups, salads, appetizers, etc.) entrees, sides and desserts;

4. Non-disposable dinnerware (utensils, plates, etc.) shall be provided;

5. Food items are predominately freshly prepared on site rather than just the warming, microwaving or final preparation of pre-packaged items; and

6. All tables are bussed by restaurant staff.

The number of non-fine dining restaurants shall not exceed 20 percent of the available first floor storefronts of either side of any city block in the Park Avenue Corridor~~, nor 15 percent of the total number of businesses in the Park Avenue Corridor~~. ~~If a restaurant currently operating within the Park Avenue Corridor as of the enactment of this ordinance [from which this section derived] ceases business operations, any applicant proposing a restaurant use in that location must satisfy the criteria for a permitted use restaurant (fine dining; non-fine dining, meeting the criteria of subsections 58-75(b)(6)b.1—6.; or coffee shop, bakery and dessert restaurant). Provided that the restaurant use has not been discontinued for a period greater than three months, as provided in subsection 58-64(d)(6) of this Code, a non-fine dining restaurant will be permitted in the location of an existing restaurant, regardless of the percentage limitations on non-fine dining restaurants.~~

c. Specialized food or beverage establishment~~*Coffee shops, bakery and dessert restaurants*~~. Certain restaurants that do not provide full service~~ of food and beverages~~, but rather limit their offerings to particular food and beverages ~~reflecting the core business of the restaurant and a limited number of ancillary non-core items, are permitted uses. These restaurants~~ includinge, but~~ are~~ not limited to, ice cream, frozen yogurt, Italian ice, smoothie, cookie, tea, coffee, wine, cheese, pastry and bakery stores shall qualify as a permitted use in the Park Avenue Corridor. ~~The restaurants of this category must also provide retail sales and consumption of the named core~~

~~food or beverage products on premises. Such restaurants shall include, as part of their application for the business tax receipt, a menu identifying the core offerings of the business and a limited number of ancillary non-core items. The restaurants of this category shall not change their core offerings, nor significantly expand their ancillary, non-core offerings, without submitting an application to the City for another business tax receipt.~~

~~(7) Churches, nonprofit organizations' halls/lodges and schools less than 5,000 square feet in size. (See parking requirements for limitations).~~

(c) *Conditional uses.* The following uses may be permitted as conditional uses following review by the planning and zoning board and approval by the city commission in accordance with the provisions of this C-2 district section only. See section 58-90, conditional uses.

(1) Restaurants, outside of the Park Avenue Corridor, with the exception of fine dining restaurants, ice cream, tea, coffee, cheese, pastry and bakery shops, with retail sales and consumption on premises;

~~(2) Churches, nonprofit organizations' halls/lodges, and schools 5,000 square feet or larger in size. (See parking requirements for limitations).~~

(2~~3~~) Buildings with a third floor and up to 40 feet in height provided that such conditional use approvals require two public hearing approvals by the city commission;

(3~~4~~) Retail stores in excess of 6,000 square feet per floor;

(4~~5~~) Reserved.

(5~~6~~) Buildings over 10,000 square feet or any addition over 500 square feet to an existing building over 10,000 square feet or additions over 500 square feet to existing buildings that result in a building over 10,000 square feet in size.

(d) *Accessory uses permitted,* Accessory uses shall be permissible for business containing more than one type of permitted use. The business tax receipt shall pertain to the principal use. Accessory uses shall not exceed forty percent (40%) of the leasable square footage and may not exceed twelve customer seats.

(1) For example, a 1,000 square foot bookstore would may be permitted to operate a 400 square foot coffee shop for on- or off-premise consumption with eight customer seats.

(d) *Minimum building lot size.* There shall be no minimum lot size in this district.

(e) *Development standards.*

(1) On all streets, buildings and structures shall be built to a zero-foot building setback from the property line or such front setback as is established by the average front setback of the existing buildings on that block of street frontage, whichever is greater. However, canopies may extend over the sidewalks provided a clearance of nine feet, zero inches is maintained from the sidewalk to the bottom portion of the canopy.

(2) Building heights shall not exceed the height limits imposed by the maximum height map. For those properties within the geographic areas shown with a two-story maximum, the maximum building height shall be 30 feet; for those properties shown with a three-story maximum height, the maximum building height may be up to 40 feet if approved via conditional use. Variances for more than three stories in the central business district are prohibited. Parapet walls, mansard, gable or hip roof appendages or similar architectural elements or appendages on a one- or two-story building may be added to the building height but in no case shall extend more than five feet above the building roof height limitations established in the section. Mechanical equipment, elevator towers and related nonoccupied structures may be added to the building roof height but in no case shall exceed more than ten feet above these building roof height limitations and shall be located to the maximum extent possible so that they are not visible from the street.

(3) Buildings shall be setback no less than ten feet from the rear lot line.

(4) No side yard setbacks shall be required on interior side property lines.

(5) The maximum floor area ratio for any building shall be 200 percent. The floor area ratio shall include the floor area of any attached or detached above-grade private parking garage.

(6) The maximum floor area ratios outlined above are not an entitlement and are not achievable in all situations. Many factors may limit the achievable floor area ratio, including limitations imposed by the maximum height map, concurrency management/level of service standards, physical limitations imposed by property dimensions and natural features as well as compliance with applicable Code requirements such as, but not limited to, parking and internal circulation, setbacks, landscaping requirements, impervious lot coverage, design standards and on-site and off-site improvements and design amenities required to achieve land use compatibility. Land located across a street and/or separated from the building site shall not be included in the floor area ratio calculations.

(7) Residential density.

a. The maximum residential density shall not exceed 17 units per acre.

b. Notwithstanding this residential density limit, the property at 444 W. New England Avenue may be used at a maximum residential density of up to 48 units per acre. This density allowance may only be applied to residential use within the existing second floor of the existing building as of the date of adoption of this subsection. Residential units are not permitted on the ground floor of the building located at 444 W. New England Avenue.

(8) Terracing and articulation requiring additional setbacks are required to create relief to the overall massing of the building facades. Such design features of building facade articulation are required at least every 60 feet, on average, along the primary building facades facing the streets, or along the building frontage where the building fronts the primary parking lot area. For any building over two stories in height and over 200 feet in length, there shall be a 35-foot break on at least the first floor, the design of which shall be a component of the architectural review process required for conditional use. For any building over two stories or 30 feet in height, a significant portion of the top floor shall be terraced and stepped back from the exterior face of the next lower floor. Parking structures are exempt from this terracing requirement.

(9) Any above-grade parking garages or decks constructed within this district must be at least 100 feet away from any property used for single-family or low-density residential.

(10) Other Code sections related to development that should be referenced include, but are not limited to, off-street parking regulations, maximum height map, general provisions, definitions, sign regulations (article IV), environmental protection (article V) (this section includes division 1, stormwater; division 6, tree preservation; division 8, landscape regulations; division 9, irrigation regulations; and division 10 exterior lighting), subdivision regulations (article VI), historic preservation (article VIII) and concurrency management regulations (article II).

(11) All properties facing on Park Avenue or adjacent roads within 140 feet of Park Avenue or that are located across from Central Park and all properties that abut Central Park, where development would impact the open vista of Central Park shall be limited to two stories in height as depicted on the maximum height map. Variances or approvals of development in violation of this policy are prohibited.

(f) *Nonconforming uses.*

(1) Notwithstanding the provisions for nonconforming uses elsewhere in this article, those properties which are nonconforming uses with respect to the Park Avenue Corridor vertical zoning restrictions shall be permitted to change occupancy or tenancy to a similar nonconforming use provided the existing use on the premises is not discontinued for a period of three months or more.

(2) Notwithstanding the provisions for these nonconforming uses elsewhere in this article, those properties which are nonconforming uses with respect to the Park Avenue Corridor, vertical zoning restrictions, shall be allowed to relocate and exchange locations with an existing permitted use provided the square footage and frontage remains the same or less and provided the original nonconforming use space is converted and committed to use as a permitted use and provided such a relocation and exchange is approved by the city commission.

(g) *Park Avenue Corridor Vertical zoning restrictions special circumstances.* In certain instances, there may exist buildings or tenant spaces that are within the Park Avenue Corridor vertical zoning restrictions which present special circumstances which mitigate against prohibiting ground-floor businesses, such as offices, beauty/barber salon, spas, cosmetic treatments businesses. These building areas may receive a special exception from the Park Avenue Corridor vertical zoning restrictions. In addition to the criteria previously detailed in that section, the following additional factors must be satisfied. The use must occupy floor space which fronts on a side or rear street other than Park Avenue or consist of an interior space fronting on an adjoining pedestrian arcade which does not front on Park Avenue. The area must either be an independent structure or not exceed 25 percent of the ground-floor area of all existing tenant space within the building involved. The area must not be visible from Park Avenue or should be remote from visibility if located on a side street. The area must not inhibit the predominately retail character of the immediately surrounding area of the central business district.

(h) *Restaurants.* The following standards and criteria shall apply:

(1) The city has established that outside of the Park Avenue Corridor all existing and proposed restaurants are conditional uses in this zoning district, except fine dining restaurants, and ice cream, tea, coffee, cheese, pastry and bakery stores, with retail sales and consumption on premises. For those restaurants that are conditional uses, renovations, changes in decor, floor plan, menu or operating hours up to midnight are not deemed to be significant changes which require amendment of the conditional use permit. Changes which result in the addition of building area, seating or operating hours beyond midnight are deemed to be significant changes which require amendment/approval of a conditional use.

(2) In order for these restaurant C-2 zoning regulations to be effectively applied, this article contains strict definitions of fine dining restaurants, non-fine dining restaurants, and coffee shops, bakery and dessert restaurants, which are either permitted uses or require conditional use approval, and cocktail lounges, taverns, and bars, as well as fast food restaurants, which are prohibited uses. Generally, if there is consumption of either food or alcoholic beverages on the premises, then the conditional use requirement applies with the exceptions of the permitted uses shown in subsection (b)(6) above. If the business is solely for food or alcoholic beverage sale for consumption off the premises, then conditional use approval is not required. With food stores or convenience stores where the primary business is the retail sale of food and beverages for consumption off premises, or when prepared sandwiches or other food is clearly incidental to the principal retail activity, then limited consumption on premises (up to ten seats) inside the premises is permitted without conditional use approval. Otherwise, if a restaurant does not fit under one of the permitted uses in subsection (b)(6) above, then conditional use approval is required.

(3) Among the issues reviewed for conditional uses in this district, the adequacy of parking is often the most contentious. A frequent proposition is that the type of business, its menu, its hours or its size will cater exclusively to pedestrian traffic from employees and visitors already in the downtown. In light of the ability for the nature of the business to change, this proposition is not agreed to be an acceptable argument for the inadequacy of private parking.

(4) The hours and types of amplified musical entertainment permitted within any type of restaurant shall be governed by the noise regulations within chapter 10 of the Code of Ordinances.

(i) *Standards and criteria for conditional uses.*

(1) *General.* These standards are in addition to the standards set forth in section 58-90. Each application for a conditional use shall be accompanied by a site plan, drawn to scale, showing the location and area of the building with respect to the adjacent building including all driveways, sidewalks and off-street parking spaces. The site plan submittal shall also include floor plan(s) depicting the area intended to be devoted to customer use, employee use, and storage needs. Upon approval of any application, said site and floor plan and accompanying data plus any conditions imposed by the city commission shall become part of the conditional use permit. It may be amended only by the city commission after receipt of a recommendation from the planning and zoning commission. A conditional use permit may be issued after a hearing based on the following criteria:

a. The proposed use is in keeping with the character of the central business district or CRA area as a distinctive retail and restaurant district of individual specialty stores and fine dining restaurants;

b. The proposed use will not negatively affect the aesthetic character of the area nor create or significantly increase vehicle and pedestrian conflicts;

c. The proposed use will not cause traffic congestion due to vehicles obstructing the public streets while waiting to use any facility, or in any manner obstruct traffic;

d. The proposed use provides a degree of private off-street parking that is in keeping with its peak and normal demand for parking.

(2) *Three-story buildings.* In addition to the other conditional use criteria specified for conditional uses within this district, the following standards and criteria shall also apply and be satisfied for such approvals:

a. The proposed building, building addition or tenant space shall have an exterior architectural style and appearance that complies with the criteria established within the facade design guidelines adopted as part of this district. Furthermore, the building, building addition or tenant space shall be designed to be consistent with the architectural style of the existing building.

b. The proposed building, building addition or tenant space shall comply with the parking requirements as required for new building space as specified in this Code.

c. Four votes of the city commission shall be required for approval.

(j) *Hannibal Square Neighborhood Commercial District.*

(1) The Hannibal Square Neighborhood Commercial District (HSNCD) area shall be restricted to the following areas:

a. Properties abutting Morse Boulevard between Capen Avenue and Virginia Avenue;

b. Properties abutting New England Avenue between Pennsylvania and New York Avenues;

c. Properties abutting Pennsylvania Avenue between Lyman and Garfield Avenues, including those existing commercial properties just north of Garfield Avenue; and

d. Properties abutting Hannibal Square East.

(2) In order to implement the comprehensive plan and the community redevelopment area (CRA) plan, there are established special provisions for the development of buildings and other improvements in this area which shall take precedence over other provisions of this article.

(3) In this HSNCD area, third floors shall be restricted and limited to residential use only and a deed restriction to that effect, enforceable by the city, shall be required as a condition of obtaining a building permit for the construction of a third floor.

(4) Building heights on the north end of Pennsylvania Avenue shall be two stories maximum when transitioning to residential.

(5) Development approvals must ensure that compatible land use relationships occur, particularly between land uses within perimeter areas of the HSNCD and areas 500 feet outside this area so as to protect the surrounding residential areas and local churches and other nonprofit organizations from incompatible uses.

(6) In this HSNCD area, all new buildings and building additions over 500 square feet shall require site and building plan approval by the city commission at a public hearing. Prior to that hearing, the planning and zoning board shall also review such site and building plans at a public hearing and shall provide their recommendation.

(k) *Central business district area facade review.*

(1) In addition to the other requirements and regulations of the C-2 zoning district, and prior to the issuance of a building permit for the construction, renovation or remodeling of any building exterior facade, an approval by the planning department for the building facade construction, renovation or remodeling is required.

(2) For purposes of this subsection, replacements, renovations or changes to canopies or awnings and to signage on walls, canopies or awnings shall be considered remodeling of the building facade.

(3) Building elevation drawings and other plans shall be submitted with sufficient detail to indicate the building materials, composition, color, etc., so that the visual appearance of the resultant work is readily apparent.

(4) The planning department shall render a decision on all applications for building permits for building facade construction, renovation or remodeling. The decision of the planning department shall be made within ten working days, excluding holidays, of the receipt of a complete set of plans and application materials, unless referred to the planning and zoning commission for review as outlined below.

(5) The planning department's decision shall be either an approval, an approval with conditions or denial. Any applicant for building facade approval may elect to appeal a decision of the planning department to the planning and zoning commission for their consideration.

(6) Decisions by the planning department and/or the planning and zoning commission shall be made based on the conformance of plans and application materials to design guidelines and criteria adopted by the city commission.

(7) The decision of the planning and zoning commission shall be the final decision of the city except where a building project also requires conditional use or other land development approval by the city commission. In that case, the decision of the planning and zoning commission shall be a recommendation with the final decision made by the city commission.

(l) *Morse Boulevard design guidelines.*

(1) The Morse Boulevard designated area is defined as those properties fronting Morse Boulevard between New York Avenue and Denning Drive and additionally the properties in the blocks bounded by Morse Boulevard, Denning Drive, Canton Avenue and Harper Street.

(2) In addition to the other requirements and regulations of the C-2 zoning district and prior to the issuance of a building permit for the construction, renovation or remodeling of any building or building exterior facade fronting on a street within the Morse Boulevard designated area, an applicant is required to obtain approval of the plans by the planning department.

(3) Building elevation drawings and other plans shall be submitted with sufficient detail to indicate the building materials, composition, color, etc., so that the visual appearance of the resultant work is readily apparent.

(4) For purposes of this subsection, replacements, renovations or changes to canopies or awnings and to signage on walls, canopies or awnings shall be considered remodeling of the building facade.

(5) The planning department shall render a decision on all applications for building permits for building facade construction, renovation or remodeling. The decision of the planning department shall be made within ten working days, excluding holidays, of the receipt of a complete set of plans and application materials, unless referred to the planning and zoning commission for review as outlined below.

(6) The planning department's decision shall be either an approval, an approval with conditions or denial. Any applicant for building facade approval may elect to appeal a decision of the planning department to the planning and zoning commission for their consideration.

(7) Decisions by the planning department and/or the planning and zoning commission shall be made based on the conformance of plans and application materials to the Morse Boulevard design guidelines and criteria adopted by the city commission.

(8) The decision of the planning and zoning commission shall be the final decision of the city except, where a building project also requires conditional use or other land development approval by the city commission. In that case, the decision of the planning and zoning commission shall be a recommendation with the final decision made by the city commission.

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Sec. 58-95. Definitions.

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Ancillary use means a subsidiary use connected to the principal permitted use of a building or piece of land and located on the same development site as the principal use.

***

Bar, cocktail lounge, or tavern means any establishment which is devoted primarily to the retailing and on-premises consumption of alcoholic beverages. Such establishments may also serve meals and food as is customary for restaurants; however, this particular use shall be those establishments where more than 50 percent of the gross revenue is derived from alcoholic beverage sales versus food sales.

***

Fast food restaurant means any restaurant whose normal business model includes two or more of the following criteria or characteristics:

(1) A predominance of locations offer drive-thru service;

(2) The menu consists of predominantly fast food or take-out food typically: consumed on site, or off the site as to-go food; pre-made and wrapped before customers place orders; served with disposable tableware or typically served in paper or plastic containers;

(3) Food is typically ordered from a wall menu at a service counter;

(4) Food consumed on the premises is typically ordered while customers are standing;

(5) Payment must typically be made by customers before food is consumed;

(6) Customers typically bus their own tables;

(7) The service counter is closer to an entry/exit than is the seating/dining area; or

(8) The business interior is brightly illuminated (greater than eight candlefoot power as measured in a horizontal plane three feet above the floor).

Any restaurant meeting the above-definition shall be considered a fast food restaurant under this Code, even if it also meets the criteria for a non-fine dining restaurant under subsection 58-75(b)(6).

***

Fine dining restaurant means any establishment which is devoted to the retailing and on-premises consumption of meals and food where more than 50 percent of the gross revenue is derived from food sales versus alcoholic beverages. Additionally, fine dining restaurants shall meet all of the following criteria:

(1) A host or hostess must be regularly present to greet and arrange for seating of patrons;

(2) Food and beverage service (other than bar service) is provided via table service by servers;

(3) Dinnerware (utensils, plates, etc.) shall be non-disposable;

(4) Ordering, food service and payment is done at the table; and

(5) The menu shall consist of fine dining cuisine with a range of appetizers, entrees and desserts along with appropriate selections of beverages.

Establishments which include a drive-thru or where ordering or payment is done at a counter/cashier and then the food and/or beverage is brought to the table or customer by restaurant staff shall not be considered fine dining restaurants. Payment at a counter/cashier may be allowed only and exclusively to accommodate take-out orders. ~~Take-out orders shall not exceed ten percent of the gross revenue.~~

***

Ice cream and coffee shops mean any establishment primarily devoted to the sale of ice cream, frozen yogurt, Italian ice, cookies, pastries, coffee, teas and other beverages.

***

Non-fine dining restaurants means any restaurant that satisfies all of the following criteria:

(1) Upon a patron's request, on-site food and beverage service shall be provided via table service by servers;

(2) Appropriate visible signage is provided to notify patrons of the availability of table service;

(3) The menu consists of a variety of food options including pre-entree items (soups, salads, appetizers, etc.) entrees, sides and desserts;

(4) Non-disposable dinnerware (utensils, plates, etc.) shall be provided;

(5) Food items are predominately freshly prepared on site rather than just the warming, microwaving or final preparation of pre-packaged items; and

(6) All tables are bussed by restaurant staff.

***

Park Avenue Corridor means the area which encompasses those properties having frontage on Park Avenue or having frontage on the intersecting streets within 140 feet of Park Avenue.

***

Restaurant means any establishment which is devoted to the retailing and on-premise consumption of meals and food and where more than 50 percent of the gross revenue is derived from food sales versus alcoholic beverage sales. The on-premises consumption of food may be by patrons either standing or seated on chairs, stools, or benches. Establishments whose primary function is the retail sale of food "to go" for consumption off premises, but which may have up to 12 seats designed for on-site consumption by patrons within the store, are not deemed to be restaurants. This zoning definition of restaurant is not intended to be applicable to the alcoholic beverage license requirements of this Code.

Retail means the sale of goods or merchandise from a fixed location, such as a store, boutique or kiosk, which goods are to be taken off the premises for use by the purchaser.

***

Economic
Development
Advisory Board

agenda item
5.b

item type
Non-Action Items

meeting date
July 9, 2024

prepared by
Kyle Dudgeon, Assistant Division Director of Economic Development/CRA

approved by
Peter Moore, Director of Office of Management and Budget

subject
Board Prioritization Discussion

motion | recommendation
N/A

background
At the June EDAB meeting, the board suggested providing a discussion item to outline board priorities, review existing material, and draw connection between that material and existing conditions to help chart the path forward. Included for review are several pieces of information from previous EDAB and City documents including:

- EDAB subcommittee economic development definition
- City Vision Report
- MJB Consultants retail vision work
- Selected city budget documents
- Electric utility power rates

Staff is requesting a review of the material as a backdrop to discussing and prioritizing future board considerations,

alternatives | other considerations
N/A

fiscal impact
N/A

attachments

1. EDAB - Intro and Goals
2. EDAB Basics Addendum 6-30-24- Combined

EDAB Overview and Opportunities

<u>Context for Economic Development Board</u>

A. Economic Development in Winter Park is focused on maintaining our quality of life and providing the tax base to support that quality of life. See the Winter Park – "Economic Development Definition" (April 19, 2022) and Guiding Principles 1 and 2.

B. The top 3 characteristics residents value the most based on the Resident Visioning Project in 2016 are:
   a. **Our History and Heritage**
   b. **Our Village Ambiance and Small-Town Charm**
   c. **Our efforts to be Proactive about our Future and Growth**

C. "Park Avenue today remains the premier "Downtown" in metro Orlando. The only one that offers a walkable and authentic "Main Street" experience with a **<u>critical mass of comparison goods</u>** retailers." Keeping Park Avenue and its spill over commercial districts occupied with strong retailers extends the "**Dwell Time**" for customers and preserves Winter Park's brand. Because our market area is 150,000 people for 70% of our sales, Winter Park residents and workers have a much broader selection of retail and restaurants than a town of 30,000 should expect. (MJB Phase 1 Market Report)

D. Winter Park's Budget for its high level of services is the **General Fund**, with the following characteristics:
   a. It is ALWAYS a balanced budget with expected revenues exceeding expenses.
   b. It has a $20 million dollar emergency reserve.
   c. Winter Park has the lowest "millage rate" (the property tax rate) in all of Orange County (see bar chart).
   d. It has the fastest emergency response times in the region.
   e. The General Fund Fiscal Year Ending 10/1/24 has a Revenue Budget of [$70 mill] and Expense Budget, including construction ("capital") projects of [$68 mill].
   f. Winter Park has diverse revenue sources. Only [43%] comes from real estate taxes. [13%] comes from Orange County Sales Taxes, which is directly linked to tourism. The balance comes from fees for services and from excess funds and reimbursements from our power company and our water company (which are called our "Enterprises").
   g. Our "Enterprises" are well run and efficient. The power company serving 80% of Winter Park residents has the lowest rates in the region <u>and</u> is self-funding our undergrounding and sustainability efforts. The water company has excellent water quality and serves the water and sewer needs of an area [3x] the size of Winter Park itself.
   h. In crisis times, city staff can adjust spending and stay within our revenue.

Areas of EDAB Influence

The Economic Development Advisory Board can influence the vitality of the City by advising the Commission on Policy and by alerting and guiding our City team on local issues. Some of those areas are:

A. Keeping the "Big Picture" of Winter Park's charm and history as the keys to success
B. Suggesting Programs and Marketing for merchants and businesses
C. Creating and Targeting Incentives
D. Being a voice for budget and content of Seasonal and Other City Events
E. Being a voice for service level changes
F. Recommending policy changes that might attract targeted businesses.
G. Identifying Target businesses and uses
H. Researching, educating, and marketing useful information to the business community
I. Supplementing City and Chamber statistics with useful marketing information

Specific Opportunities:

1. Board member Workshop/Review of the Retail Report and Other background information.
2. Refine and Communicate the Retail Market Study to other parties.
3. Execute and adjust the Retail Study Implementation Plan.
4. Refine how we define and pursue target businesses.
5. Explore how to create entrepreneurial and e-commerce strategies to build resilience in recessions (based on COVID and 2008/2009 lessons).
6. Explore profiling the customers for Park Avenue and other corridors with strategies to reach them.
7. Advise and monitor incentive programs.
8. Similar to the Retail study, evaluate importance of and positive characteristics of Financial Services. Discuss how to incentivize and create a critical mass of financial services (as commercial properties redevelop under existing codes).
9. Develop understanding of the Community Redevelopment Authority mission and funding to integrate with EDAB initiatives.

EDAB Addendum/Excerpts (PMA 6/30/24)

1. Economic Development Definitions and Guiding Principles
2. Vision 2016 Word Cloud
3. Retail Concepts and Park Avenue- MJB Phase 1 Excerpt
4. Millage Rate Comparison Bar Chart
5. General Fund Budget Pie Chart
6. Winter Park Power Company Rate Comparison Bar Chart
7. Retail Vision
8. Retail Implementation Plan – MJB Phase 2 excerpt
9. Winter Park Market Area- MJB Phase 1 excerpt

1. Economic Development Definitions and Guiding Principles

401 South Park Avenue • Winter Park, Florida 32789
407-599-3695 • 407-599-3448 fax

CRA/Economic Development

Winter Park- Economic Development Definition (April 19, 2022)
"Economic Development is the creation of wealth from which community benefits are realized. It is more than a jobs program, it's an investment in growing your economy and enhancing the prosperity and quality of life for all residents."

The Department follows a number of guiding principles in which it follows to execute its initiatives, projects, and programs.

1. Our **quality of life** through the city's charm and character is our competitive advantage.
(Metric example: City report, City Visioning)

2. Act as fiscal stewards in **growing the tax base** to meet our needs (to support Quality of Life) and ensure future prosperity and safeguard real estate ad valorem growth rate exceeds expense growth
(Metric example: City budget metrics, DOR code analysis)

3. **Attract targeted businesses and workforce** that is resilient, offer opportunity, and add to individual and community prosperity, be a net exporter of high value goods and services, providing thoughtful and premier commercial choices for residents and guests.
(Metric example: Location Quotient Report, Wages, Chamber Scorecard)

4. Maintain the city as a **regional partner and player** while sustaining the city's scale and character as a **unique economic driver**.
(Metric example: Regional organization membership, infrastructure and road spending, consumer trade area market spending)

5. Embrace and leverage **our location education institutions** for a hirable, talented workforce and clustering that fosters lifelong learning.
(Metric example: Census)

6. Coordinate with city departments and regional efforts on the linkage between availability of **attainable housing and commuting to ensure appropriate job needs** and activation opportunities within the community.
(Metrics example: Chamber scorecard)

7. Winter Park is a welcoming city that strives for **inclusivity and sustainability** as a premier place to live work and play.

2. Vision 2016 Word Cloud

OUR VALUES

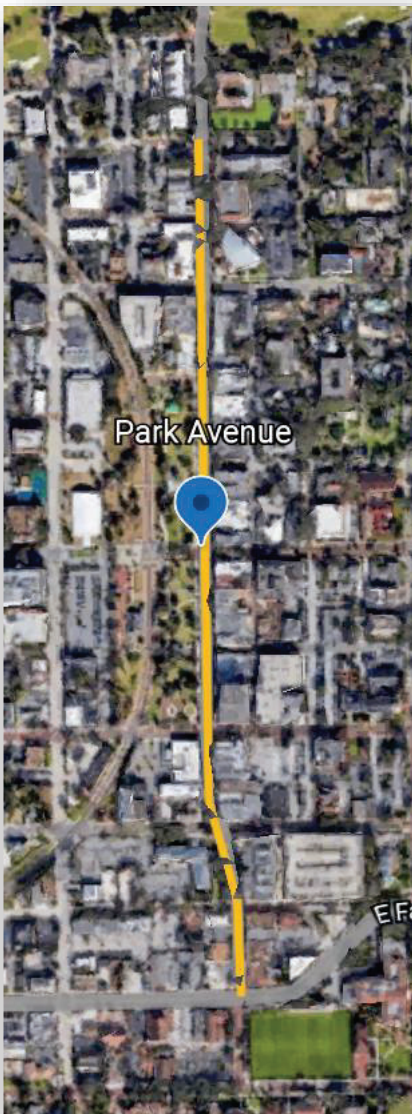
safety/ security
parks/ recreation
cultural assets
family-oriented
stewardship/ sustainability
diversity
uniqueness
landscape setting/ wildlife
proactive growth/ future
thriving commercial areas
village ambiance/ small town feel
active/healthy lifestyles
collaboration/ involvement
locational convenience
transportation/ transit
friendly/ welcoming
quality of life
creativity
community/ people
appeal/ destination
excellence/ high-quality/ world-class
tranquility/ calmness
character
equality
pride
technology
vibrancy
progressive
history/heritage
inclusiveness
education
generational appeal
walkability/ bikability
aesthetics

3. Retail Concepts and Park Avenue- MJB Phase 1 Excerpt
   Key Concepts:
   a. "**Critical Mass of Comparison Shopping**"
   b. "**Dwell Time**"
   c. "**Flight to Quality**" is part of success
   d. The high concentration of comparison goods retailers is THE MOST important aspect of Park Avenue's strength
   e. Restaurants benefit from retail, particular with midday hours.

Winter Park's Business Districts and Commercial Corridors

Of course, these consumer segments are not distributed evenly across the study area. Rather, they impact different districts and corridors differently, for a variety of factors, not the least of which is the complex role that the *other* marketplace – the one in which tenants lease (or buy) space from landlords – plays in the ultimate composition of retail mix.

Park Avenue



Park Avenue today remains the premier "Downtown" in metro Orlando, the only one that offers a walkable *and* authentic "Main Street" experience with a critical mass of comparison goods retailers.

The Mall at Millennia and the Florida Mall are both, well, enclosed malls. Disney Springs is, well, Disney, which trade area residents largely avoid to the extent possible. And while other Downtowns like Winter Garden and Mt. Dora are no doubt ascendant, they draw primarily with food and beverage, presenting little threat at the moment as shopping destination(s).

Generally speaking, the shopping along Park Avenue targets an upmarket (though not luxury) clientele. Yet while it features retailers that appeal to shoppers middle-aged and older, like Chico's, Lily Pulitzer, J. McLaughlin, Talbots and Eileen Fisher, its diversified collection also plays to younger audiences with concepts like Evereve, Lululemon, Synergy and the Impeccable Pig.

The arrival of Warby Parker is particularly noteworthy. A pacesetter of sorts for the ever-growing number of "digitally-native" brands that started as online-only before expanding into brick-and-mortar, the seller of uber-stylish yet moderately-priced eyewear speaks directly to the aforementioned psychographic of Millennial neo-hipsters and signals a forward-looking, "on-trend" shopping street.

Similarly, with sit-down dining, the mix skews upmarket but has evolved over the years to encompass not just traditional cuisines and atmospheres – like, for instance, BoVine Steakhouse, Prato and Pannullo's Italian – but also, more ethnic and contemporary concepts – such as Bosphorous Turkish Cuisine, AVA MediterrAegean, ORO and Farm + Haus.

Amidst all of the hand-wringing about retail apocalypse, online competition, pandemic impacts and a looming recession, Park Avenue is that sort of "Class A" location which benefits from the "flight to quality" phenomenon, whereby tenants consolidate in or gravitate to the established market leaders in times of contraction or disruption.

Retailers and restaurants will come and go on Park Avenue, but with demand for a street-level presence far exceeding the supply of this very limited resource, newly-available spaces should backfill, assuming the floorplates are workable and the asking rents are market-appropriate.

Indeed, several Park Avenue businesses closed in the early pandemic months, yet the vacancy rate today is still quite low, with new arrivals like Evereve (replacing the Gap), Warby Parker (Alex and Ani) and Park Avenue Contemporary Art (Lighten Up!) as well as Farm + Haus (Café de France) and AVA MediterrAegean (Luna on Park).

Park Avenue's appeal as a location for comparison goods brands remains so strong, in fact, that its roster *improved* not only amidst COVID-19, but also, at the same time that Casto was redeveloping Winter Park Village on 17/92 and undoubtedly trying to poach or attract such retailers.

Further evidence of its allure can be seen in the spill-over of its energy to intersecting side streets, Hannibal Square and Fairbanks Avenue, where well-capitalized outfits that might prefer a Park Avenue address, like Park Avenue Tavern and Bang & Olufsen, are compelled to locate as a result of the undersupply.

For all of these reasons – the critical mass, the diversification, the flight to quality – Park Avenue's future prospects do not seem to offer cause for concern. Indeed, they actually point to a relatively deep pool of prospective tenants as well as consumer submarkets to further penetrate.

For example, it could conceivably attract other such digitally-native brands, including ones that appeal to the neo-hipster psychographic yet prefer locations along established shopping streets (versus, say, Mills 50). Also, it can potentially build on its collection of home stores (e.g. Pottery Barn, Williams-Sonoma, RH, Park Avenue Contemporary Art, etc.), a category in which existing co-tenancy exerts an especially strong pull.

This is not to say, though, that there is an absence of risk. Perhaps most worrisomely, elevated ground-floor rents threaten to narrow the range of tenants that can afford to locate and remain on the street, which would, in turn, jeopardize or weaken different components of its retail mix.

Contrary to popular belief, landlords are not free to charge whatever they want for their space(s). Rather, rents – or more accurately, occupancy costs (rents plus pass-through expenses like taxes, insurance and maintenance, known as "triple-nets" or NNN) – are supposed to be based on projected gross sales.

Generally speaking, the rule-of-thumb is 10%. That is, the average retailer will spend no more than 10% of its expected revenue on occupancy costs. If it agrees to more, it risks not having enough to pay for all of its other expenses. The property owner that demands too much, then, will either not land a tenant or sign one likely to fail, resulting in prolonged vacancy or constant turnover.

According to leasing professionals, market rents on Park Avenue typically fall between $55 and $65 per sq ft, with an additional $10 to $12 per sq ft in NNN – translating to occupancy costs between $65 and $77 per sq ft. In order to afford such a lease, a retailer would need to generate $650 to $770 per sq ft in annual sales.

Based on calculations by GAI Consultants, shops selling clothing and accessories on Park Avenue are currently grossing $503 per sq ft, and ones offering home furnishings, $465 per sq ft. Theoretically, then, they can handle $39 and $35 per sq ft, respectively – far below the current $55 to $65 per sq ft.

Coupled with the stubborn narrative of “retail apocalypse”, this will reinforce the longer-term trend in favor of food and beverage tenancy, which, largely due to sales of high-margin alcoholic beverages, can justify and sustain rents that are as much as 50% higher.

Historically this has been held in check by the constraints on converting shop space to restaurants, namely, the requirement to provide parking as well as the hefty costs associated with scratch-built kitchens. However, Artistry Restaurants’ plans for 500 S. Park Avenue suggest that these might no longer be adequate as deterrents.

Of course restaurants are sexy, especially in our foodie-obsessed culture. Indeed, as noted earlier, so much of what defines today’s up-and-coming competitors and concerns local stakeholders about their rise is the on-trend eateries, food halls and the like.

The trend, however, is *not* consequence-free. If spaces are converted to dining, that will mean less space for shopping. And again, with comparison goods, a shrinking collection reduces the appeal both to consumers, who want the many options, and prospective tenants, which are drawn to the co-tenancy.

The danger with critical mass is that it is relatively easy to lose but very difficult to create (or regain). Once a given location falls below that threshold, the gravitational pull of larger clusters starts to work against it – especially amidst a flight to quality. That’s partly why once-vital malls can unravel so quickly.

The uniqueness and strength of Park Avenue’s retail mix is not so much in its food and beverage – which most of its rivals offer as well – but in its concentration of comparison goods retailers and the synergies resulting from the combination of the two. To lose *that* would, in a sense, bring it back to the pack.

The retail industry today speaks to the importance of dining as a driver for shopping, but the reverse is also true, if not even more so. Especially in high-rent settings, restaurants need more than just the dinner trade, and it is the destination shopping that helps to provide the daytime traffic.

This gets to the notion of "dwell time." Mall owners have long understood that consumers spend more money in a given location when they stay there for longer. Such centers are planned, tenanted and programmed – with food courts, restrooms, child-play areas, phone-charging stations, etc. -- so as to ensure that the visitor never has a reason to leave, as it is assumed that once they do, they will not return.

Indeed, this was likely part of the reasoning for Disney's decision in the 2010's to double down on what is now Disney Springs with a major expansion of retail space that would keep visitors from leaving the Disney World ecosystem for the Mall at Millennia, the Florida Mall or the nearby outlet centers. Park Avenue does not have the room for something like that, but it can make sure to keep what it has.

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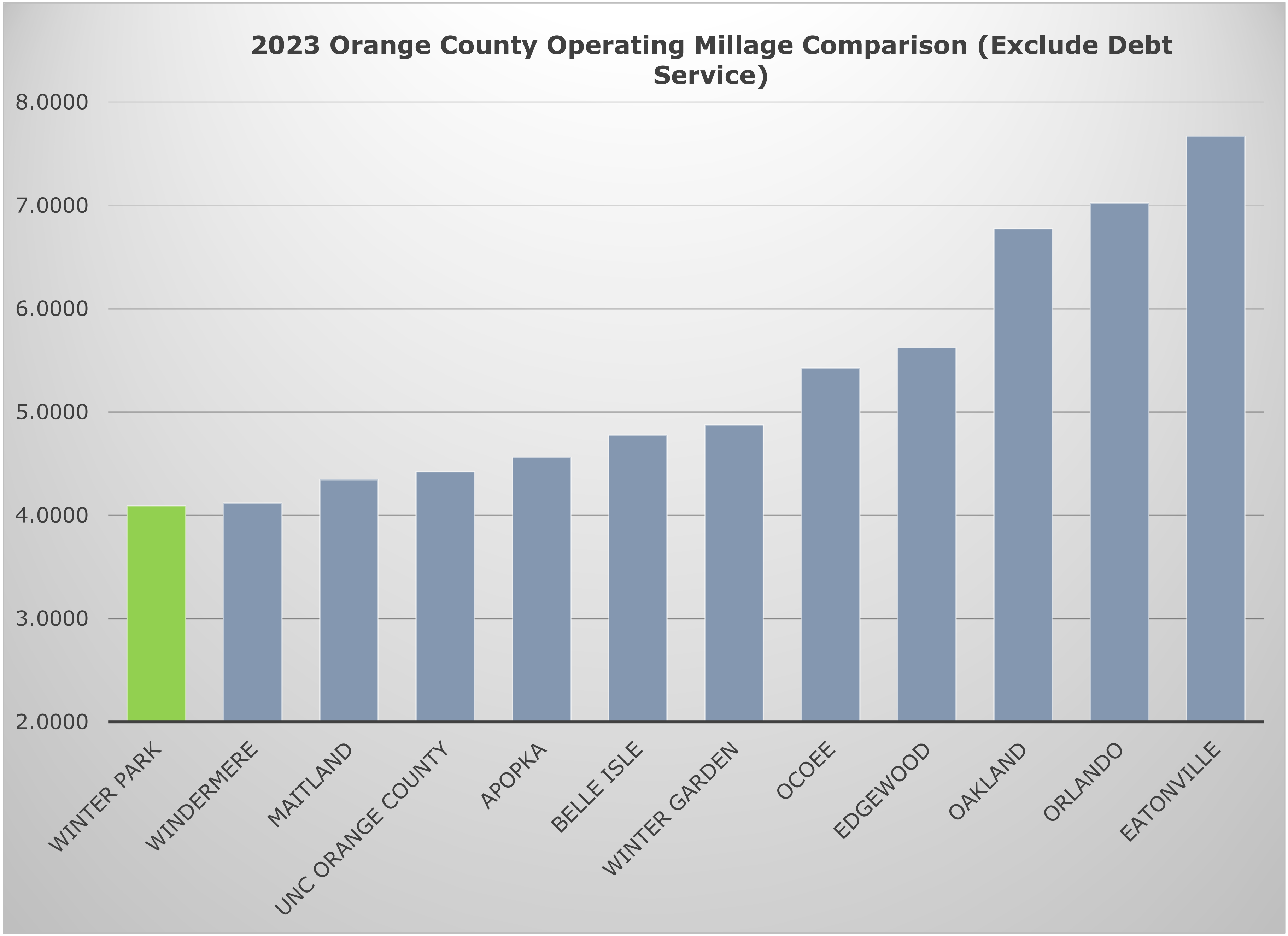
Memorandum

To:	Kyle Dudgeon Assistant Division Director, Economic Development/CRA City of Winter Park
	Peter Moore Division Director, Office of Management & Budget City of Winter Park
Cc:	Owen Beitsch Senior Director, Economic and Real Estate Advisory Services GAI Consultants Inc.
From:	Michael Berne President, MJB Consulting
Re:	Phase I Executive Summary Memo (Draft #2)
Date:	February 3, 2023

In March 2022, the City of Winter Park hired MJB Consulting, as a subconsultant to GAI Consultants Inc.'s Community Solutions Group, to undertake an assessment of retail

4. Millage Rate Comparison Bar Chart

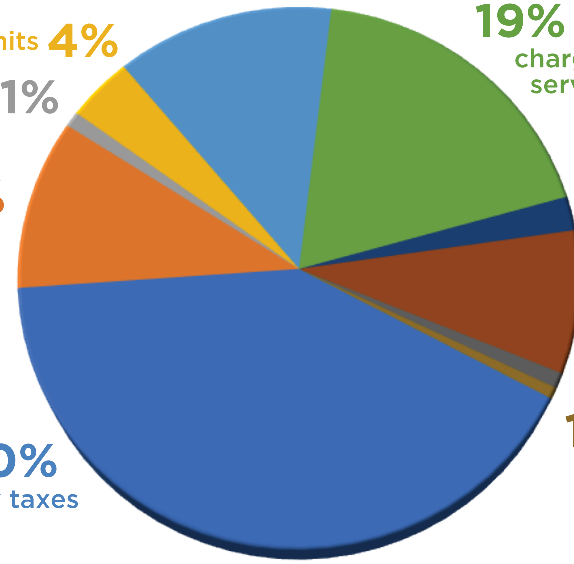


2023 Orange County Operating Millage Comparison (Exclude Debt Service)
8.0000
7.0000
6.0000
5.0000
4.0000
3.0000
2.0000
WINTER PARK
WINDERMERE
MAITLAND
UNC ORANGE COUNTY
APOPKA
BELLE ISLE
WINTER GARDEN
OCOEE
EDGEWOOD
OAKLAND
ORLANDO
EATONVILLE

5. General Fund Budget Pie Chart

general fund revenues & expenditures (2023)

The city is required to account for its finances using fund accounting. This method separates revenues and expenses into different funds based on the source of the revenue and intended use. The most notable is the city's general fund. These include property taxes, utility taxes, franchise fees, licenses & permits, intergovernmental revenues, charges for services, fines, transfers and other revenue. Expenditures for these items are broken down on the next page.

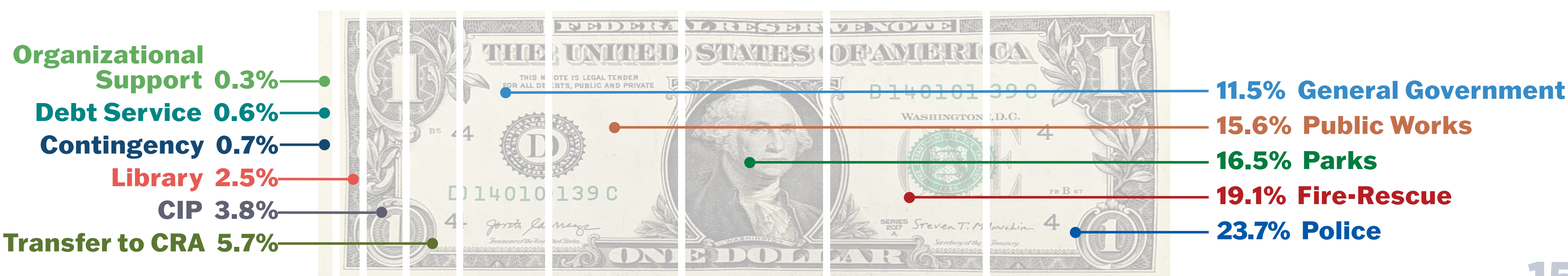


GENERAL FUND REVENUES	FY2019	FY2020	FY2021	FY2022	FY2023
PROPERTY TAXES	$22,531,341	$24,313,515	$26,155,260	$27,511,689	$30,400,941
UTILITY TAXES	6,610,204	6,665,189	6,791,257	7,006,666	7,533,817
FRANCHISE FEES	935,492	862,173	823,954	845,243	682,947
LICENSES + PERMITS	3,938,661	3,262,118	3,684,484	3,667,915	2,890,770
INTERGOVERNMENTAL	8,357,430	7,307,153	7,575,680	9,284,363	9,612,546
CHARGES FOR SERVICES	9,796,638	8,860,037	9,712,719	11,665,578	13,872,437
FINES	1,397,330	1,047,091	830,204	1,180,220	1,505,884
TRANSFERS	5,303,292	5,224,645	5,346,469	7,488,744	6,291,728
INVESTMENT EARNINGS	1,107,060	620,102	(24,837)	(2,495,309)	678,400
OTHER REVENUE	231,923	434,621	287,582	286,121	484,638
TOTAL	**$60,209,371**	**$58,596,644**	**$61,182,772**	**$66,441,230**	**$73,954,108**

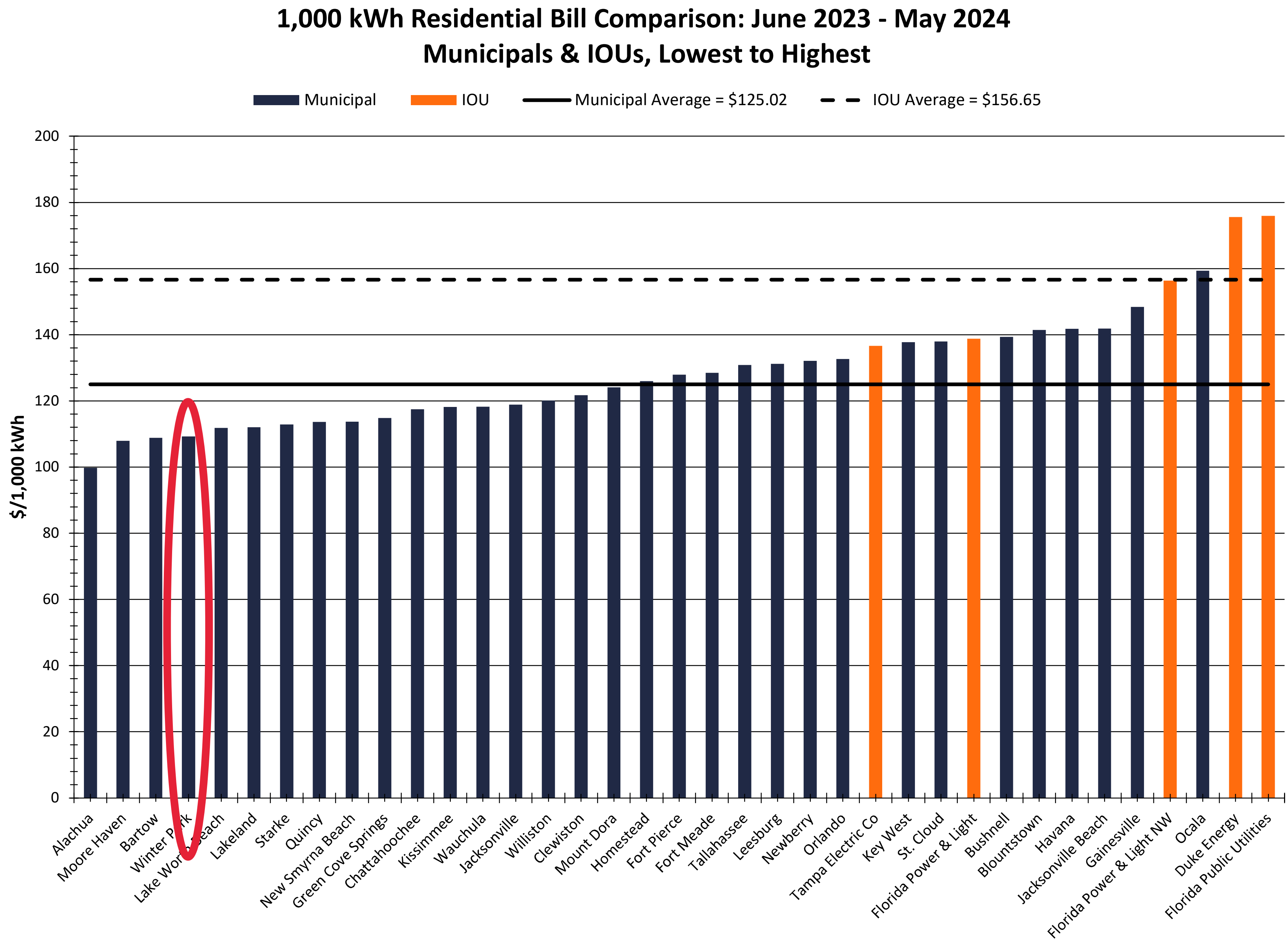
The largest increase in total value was in property taxes at over $2.9 million or 10.5% from last year. Charges for services also saw significant growth from 19% in 2023 and 20% in 2022. Expenditures rose in parks & recreation due to the purchase of the Winter Park Pines Golf Club. Transfers also saw an increase as the uptick out of COVID has grown the total number of Capital Improvement Plan (CIP) projects. Transfers out to the CRA also still remain healthy.

GENERAL FUND EXPENDITURES	FY2019	FY2020	FY2021	FY2022	FY2023
GENERAL ADMINISTRATION	$1,502,324	$1,754,007	$1,830,850	$2,218,901	$2,627,867
INFORMATION TECHNOLOGY	594,524	572,889	495,973	767,303	844,615
FINANCIAL SERVICES	392,858	419,202	446,235	440,836	535,551
COMMUNICATIONS	382,158	191,381	233,418	520,949	357,671
PLANNING + COMMUNITY DEVELOPMENT	550,958	871,964	1,034,432	1,225,552	1,002,759
BUILDING & PERMITTING SERVICES	2,023,916	2,363,024	2,045,153	1,982,704	2,240,579
PUBLIC WORKS & TRANSPORTATION	9,429,907	8,977,049	8,505,929	9,867,266	11,337,985
POLICE	14,504,784	14,901,031	15,235,458	16,338,467	16,221,951
FIRE-RESCUE	12,785,748	13,204,252	13,319,849	13,626,554	13,666,042
PARKS & RECREATION	8,654,415	8,563,143	8,712,096	10,731,167	12,442,308
CULTURAL + COMMUNITY SERVICES	1,556,772	1,717,339	1,657,004	1,656,999	1,840,000
TRANSFERS OUT	5,344,129	5,316,947	5,357,606	7,492,780	8,709,855
TOTAL	**$57,722,493**	**$58,852,228**	**$58,874,003**	**$66,869,478**	**$71,827,183**

EXAMPLE OF BUDGET EXPENDITURE BREAKDOWNS



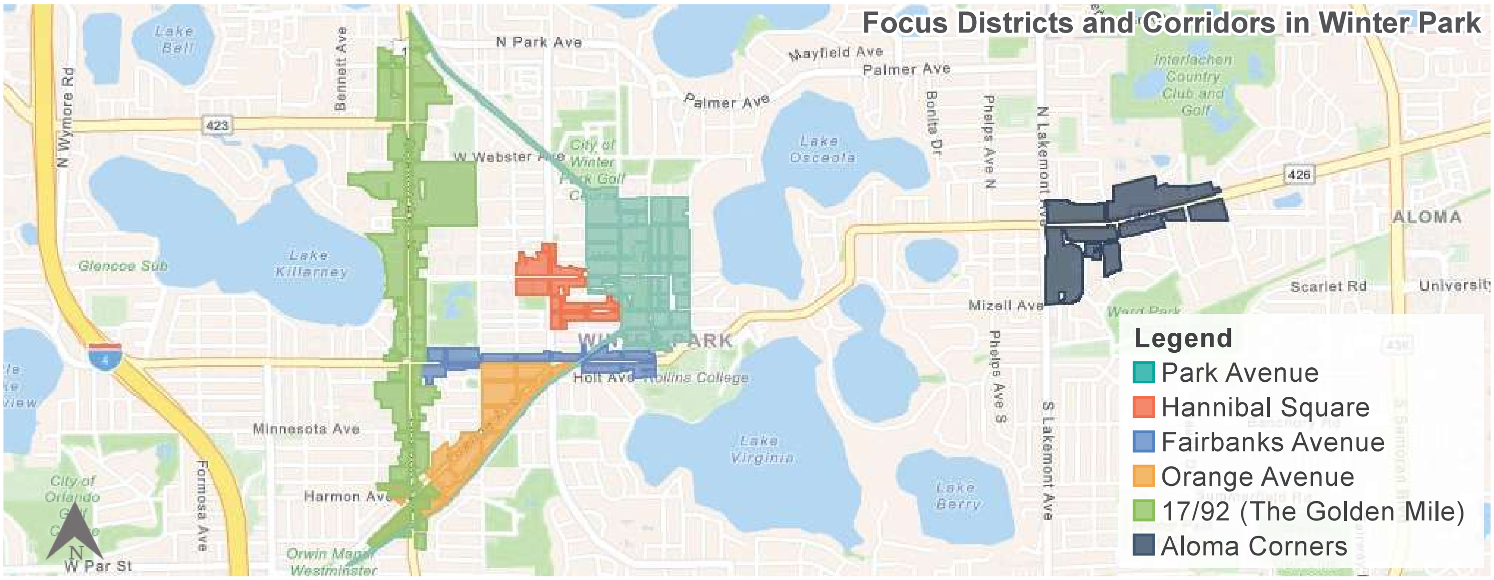
6. Winter Park Power Company Rate Comparison Bar Chart


1,000 kWh Residential Bill Comparison: June 2023 - May 2024
Municipals & IOUs, Lowest to Highest
Municipal
IOU
Municipal Average = $125.02
IOU Average = $156.65
$/1,000 kWh
200
180
160
140
120
100
80
60
40
20
0
Alachua
Moore Haven
Bartow
Winter Park
Lake Worth Beach
Lakeland
Starke
Quincy
New Smyrna Beach
Green Cove Springs
Chattahoochee
Kissimmee
Wauchula
Jacksonville
Williston
Clewiston
Mount Dora
Homestead
Fort Pierce
Fort Meade
Tallahassee
Leesburg
Newberry
Orlando
Tampa Electric Co
Key West
St. Cloud
Florida Power & Light
Bushnell
Blountstown
Havana
Jacksonville Beach
Gainesville
Florida Power & Light NW
Ocala
Duke Energy
Florida Public Utilities

7. Retail Vision Overview of All Corridors

WINTER PARK RETAIL VISION

For more information, see Phase I memorandum.



PARK AVENUE

Current Positioning

- Metro's premier walkable/ authentic shopping destination
- Upmarket, skewing middle-aged and older

Potential

- Additional **soft goods** co-tenancy
- Broadening of customer base
- Side-street opportunities

ORANGE AVENUE

Current Positioning

- Continuation of neo-hipsterdom to the south/ west
- Affordable **eclecticism**
- "Every-so-often" uses

Potential

- Home design/ improvement
- Craft food and beverage
- Vintage/resale

WINTER PARK SOCIAL HOUSE

HANNIBAL SQUARE

Current Positioning

- Park Avenue **spillover/ extension**
- Local orientation
- Food and beverage skew

Potential

- Destination concepts/brands
- Better connectivity/in-fill

17/92 (THE GOLDEN MILE)

Current Positioning

- **Upmarket/specialty strip commercial**
- "Restaurant Row" for north metro

Potential

- Comparison shopping (both upscale and value)
- "Non-commodified" conveniences
- Sophisticated/first-in-market food & beverage chain-lets

FAIRBANKS AVENUE

Current Positioning

- Park Avenue spillover + **Rollins**
- "Every so often" uses
- Primary gateway to I-4

Potential

- Hybrid college/general bookstore
- Home design/improvement, bridal
- Clinic (medical, dental, vet, etc.)
- Ongoing beautification

B&O

R BOOKSTORE

ALOMA CORNERS

Current Positioning

- Mid-market conveniences
- **Local draw**

Potential

- Fast casual/casual food and beverage
- Mall staples going "off-mall"

KEY THEMES AND CONCEPTS

Some of the key themes and concepts that emerged from the analysis in Phase I, as useful context for what has been proposed within the *Implementation Matrix*, include the following:

LOCATION DRIVERS

The extent to which the site-location decisions of prospective retail tenants are driven by considerations of "co-tenancy", that is, the nearby businesses that generate relevant cross-traffic.

CRITICAL MASS

The need for established shopping destinations, particularly ones specializing in comparison goods, to retain a "critical mass" (or remain above a certain threshold) of such stores.

GROUND FLOOR TENANCY

The importance of active retail tenancies on the ground floor of walkable districts and along the frontage of commercial corridors (to preserve such spaces for uses with the greatest need for high visibility)—in cases where tight market conditions prevail.

WINTER PARK RETAIL ECOLOGY

The understanding of Winter Park's districts and corridors as a retail ecology or hierarchy, with the tight market for retail space in one creating "spillover" tenant demand in others.

ZONING & POLICIES

The accompanying notion that the city's overall retail potential can only be maximized by grounding policies (including zoning) in such dynamics, even if in some cases that implies different expectations for individual properties and stakeholders.

INTERESTING MIX OF TENANCIES

The roles that development economics, permitted uses and rent expectations play in street-level vitality, with strategically-zoned, "second-generation" spaces often priced at levels that can be sustained by a broader and more interesting mix of tenancies.

FLEXIBILITY AS PRE-EMPTION

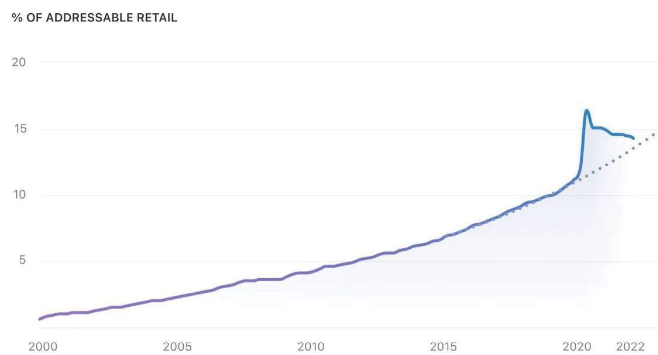
The realization that flexibility—in policy, zoning, approvals, and permitting—will be essential to keeping Winter Park relevant and differentiated in a rapidly-evolving and fiercely-competitive industry.

THE PRIMACY OF SUPPLY AND DEMAND

The recognition that market forces—specifically, supply and demand variables—can often dictate retail conditions and opportunities to a greater extent than the physical and design attributes of roads and buildings.

DEFINITION: "Retail" for the purposes of this scope-of-work has been defined broadly, to include any ground-floor uses that are consumer-facing—that is, welcoming potential customers either on a walk-in or subscription basis. This would encompass, then, personal services, food and beverage as well as entertainment venues, while precluding businesses that operate exclusively or primarily by appointment.

US Ecommerce Adoption Growth Rate



Source: U.S. Census

CAPTION: **No, e-commerce has *not* taken over:** By 2022, the market share of online sales was roughly similar to where it would have been without the pandemic, given historic growth rates.

Overall Vacancy & Asking Rent

Source: CoStar; Cushman & Wakefield Research

CAPTION: **What Retail Apocalypse?** Despite pandemic-era disruption, the market for retail space was robust in 2021 and most of 2022, with declining vacancy rates and rising asking rents.

8. Retail Implementation Plan – MJB Phase 2 excerpt

Questions:

a. Given the guidelines to sustain the Quality of Life and Charm, as well as the up-market retail on Park Avenue (largely fashion and upscale accessories), which consumers are appropriate to target? Can that targeting be done in the tourism corridor without pushing down the retail quality?
b. Are there “compatible” profiles such as historic charm preferences or arts and culture preferences?

IMPLEMENTATION MATRIX

Area – Bucket	Specific Action Item(s)	Time Horizon	Chief Sponsor(s)	Context/Commentary
Retail Marketing Collateral – **MARKETING**	Draft, refine, finalize and produce brochure, in physical and digital formats, that frames and sells Winter Park as a retail location to prospective tenants, tenant-rep brokers and other industry professionals, including inserts and tabs about specific districts as well as a sleeve for property-specific fliers.	Short Term (0-1 years)	City of Winter Park, with support from leasing professionals, the Park Avenue District and the Winter Park Chamber of Commerce.	Retailers and brokers active in Central Florida certainly know about Winter Park, but the purpose here would be to deepen awareness of the opportunity in analogous markets further afield --like, for instance, St. Armands Circle (Sarasota), Chatham (Cape Cod), Cherry Creek North (Denver), Claremont Village (Los Angeles), etc., with the ultimate goal of catapulting Winter Park into the upper echelon of retail locations nationwide; such a piece would provide ammunition with which developers, landlords and leasing professionals can make a broader community/district-level pitch that would accompany their property-specific efforts; it should be updated digitally on a semi-annual basis, and in print, annually.
Consumer Marketing – **MARKETING**	Develop and promulgate a multi-channel marketing campaign that targets theme park visitors and Central Florida residents with more elevated tastes and preferences, including tabs and inserts about specific districts.	Short to Medium Term (0-3 years – depending on sponsor response)	Winter Park Chamber of Commerce, with support from the Park Avenue District, the City of Winter Park, local hotels, Rollins College, Morse Museum and other relevant stakeholders.	Winter Park and Park Ave is still leaving money on the table in the absence of a proactive effort to capture the attention and spending of the subset of visitors that yearn for a more mature and upmarket alternative or accompaniment to the traditional Orlando tourist experience, who, while perhaps accounting for just a tiny percentage of the overall pie, nonetheless account for a large absolute number; at the same time, preemptive action is needed to ensure that Park Ave remains metro Orlando's premier "Main Street" experience in the minds of Central Florida residents, given the ascendancy of newer competitors such as Winter Garden, Mt. Dora, etc.
Place Management Entities – **MARKETING/ CAPITAL IMPROVEMENTS**	With the help of an established consultant, explore different models for a non-profit, "place management" entity for Park Ave—perhaps as an outgrowth to the Park Avenue District—that spearheads beautification efforts, stages events and promotions, coordinates marketing campaigns, facilitates economic development as well as advocates on behalf of the district and its stakeholders, among other predetermined responsibilities; provide support as well for nascent efforts to create "Main Street" or other such "voluntary" organization(s) in Hannibal Square and Orange Avenue, perhaps as outgrowth(s) of existing merchant association(s).	Short to Medium Term (0-3 years – allowing time for the Park Avenue District to "grow" into such a role and for efforts in other districts to cohere)	Park Avenue District, the Winter Park Chamber of Commerce, the City of Winter Park and landlords/ merchants, with the requisite buy-in from relevant stakeholders (in the case of Park Avenue, as part of a mandated process).	While it can take several forms (e.g. BID, SID, NID, Main Street, etc.), the benefits of such an entity for Park Avenue include the following: 1) a guaranteed funding mechanism from the additional assessment (thereby greatly reducing the dependence on City grants, private fundraising, revenue-generating events, etc. and providing greater certainty for multi-year initiatives); 2) hedge against recession-triggered decline in municipal tax base; 3) a voice and forum for property and business owners; 4) a more entrepreneurial approach to addressing district needs and challenges; 5) a mechanism for coordinating provision of collective goods; and 6) greater marketing clout for small businesses—as an approximation of the role of a mall manager but for a Downtown setting with multiple stakeholders; in contrast, the models proposed for other Winter Park districts would not involve automatic assessments and would only offer benefits #3 through #6 above.

CONTINUATION OF **IMPLEMENTATION MATRIX**

Area – Bucket	Specific Action Item(s)	Time Horizon	Chief Sponsor(s)	Context/Commentary
C-2 Zoning – **ZONING**	Consider appropriate tweaks and adjustments to the Commercial (C-2) district (Sec. 58-75) for the commercial portion of the central business district as well as definitions particularly relevant thereto: 1. Simplify definitions of different kinds of eating and drinking establishments so as to align more closely with industry terminology and understanding; 2. Raise threshold for revenue from take-out orders to qualify as a fine-dining restaurant; 3. Allow for greater flexibility in changes to "core business" (i.e. mix of goods and services) before requiring a new application to the City (e.g. for business tax receipt); and 4. Prohibit "churches, nonprofit organizations' halls/ lodges and schools less than 5,000 sq. ft. in size)" in the ground-floor of properties having frontage on Park Avenue or along intersecting streets within 140 feet of Park Avenue.	Short Term (0-1 years)	City of Winter Park, with input and buy-in from the Winter Park Chamber of Commerce, the Park Avenue District and Park Ave landlords/ merchants.	Chief arguments for each of these proposed modifications are as follows: 1. The language used to define different kinds of restaurants—for the two worthwhile and appropriate goals of protecting against fast food in particular and avoiding a proliferation of restaurants more generally—is confusing and leaves too much room for discretion, deterring prospective tenants that long for clarity and predictability; 2. The current 10% threshold does not account for the growth in "off-premise" dining that took hold amidst the pandemic. According to data from the NPD Group, off-site consumption accounted for 33% at full-service restaurants nationwide (versus 19% pre-pandemic); 3. Making such tweaks too onerous risks hampering the ability of individual businesses to respond nimbly to shifts in consumer tastes and preferences, which helps to keep the overall mix fresh and current; and 4. These uses would remove precious ground-floor inventory that could otherwise be occupied by more synergistic tenants which add to Park Avenue's critical mass.
Comparison Goods Retailers in the Park Avenue Corridor – **INCENTIVES**	Explore different sorts of incentives for existing and perspective tenants in comparison goods categories (e.g. apparel, footwear, jewelry, accessories, home goods, gifts, art, etc.), like, for instance, forgivable loans and fee waivers with interior build-out and/or modernization.	Short Term (0-1 years)	City of Winter Park and/or the CRA, with input and buy-in from the Winter Park Chamber of Commerce, the Park Avenue District and Park Ave landlords/ merchants.	Park Avenue's appeal as a shopping destination for comparison goods is a large part of what differentiates it among other competing Downtowns in the region, yet preserving and fortifying such primacy requires a meaningful commitment to retaining the critical mass in such categories, as such shops are often outflanked by other uses (e.g. eating and drinking establishments) on a level playing field; note that the purpose is not so much to promote individual small businesses but rather, to entice certain kinds of retailers (including well-capitalized ones that do not technically need the support) so as to protect the overall mix and defend a position in the marketplace.
Role for Rollins College – **INCENTIVES**	Partner with Rollins College and other stakeholders on a broader retail vision and tenanting approach along Fairbanks Avenue that can help to create a more compelling "college-town" environment for the school's roughly 3,100 students, leveraging their presence to attract amenities that the general public can also enjoy, with Rollins, for instance, contracting with a new operator for a hybrid college/general bookstore and considering leases with other such broadly-desired businesses.	Short to Medium Term (0-3 years)	City of Winter Park, Rollins College and Fairbanks Ave landlords/merchants.	Fairbanks Avenue has long ranked as Winter Park's most underwhelming commercial corridor, yet it is the prime gateway to Park Avenue as well as the front door to Rollins College, which would seem to have the mandate, the incentive and the financial wherewithal to reinvigorate the two-block stretch it primarily owns and controls so as to better compete with prospective students, professors and researchers (as well as engender good will as a tax-exempt institution)—similar to how many other elite colleges and universities across the country, in partnership with local government, have acted aggressively to elevate their surroundings for such purpose (even at the expense of their portfolio's operating margins).

CONTINUATION OF **IMPLEMENTATION MATRIX**

Area – Bucket	Specific Action Item(s)	Time Horizon	Chief Sponsor(s)	Context/Commentary
Fairbanks Avenue as Gateway – **CAPITAL IMPROVEMENTS**	Continue with ongoing efforts to beautify the Fairbanks Avenue corridor from the I-4 exit to Park Avenue while also, perhaps with the help of a transportation consultant, assessing ways to improve traffic flow as well as enhance automobile access and visibility for adjoining business.	Short to Medium Term (0-3 years)	City of Winter Park, State of Florida, the Winter Park Chamber of Commerce, Rollins College and Fairbanks Avenue landlords/merchants.	As the primary route between I-4 and Park Avenue/Rollins College, Fairbanks Avenue serves as the gateway to Winter Park for most visitors, yet in its current appearance, the City's recent investments notwithstanding, it still does not always reflect the higher standards and upmarket positioning for which the community is known, nor does it offer what is perceived as a viable alternative for uses prohibited, requiring a conditional use permit or otherwise unable to secure locations along 17/92 (see below); at the same time, leasing efforts and customer volumes along the corridor are reportedly constrained by both poor access (e.g. left turns heading eastbound are extremely difficult at certain times of day) as well as compromised visibility (e.g. navigation provides few opportunities for motorists to take notice of the businesses that they are passing.
Zoning in Orange Avenue Corridor – **ZONING**	Consider appropriate tweaks and adjustments to the Orange Avenue Overlay District (Ordinance 3228-21): 1. Require conditional use permits for certain personal services (e.g. spas, massage, cosmetic treatment) and "quasi-retail tenancies" (e.g. financial institutions, professional offices, medical/dental clinics) at street level, while limiting entrances, leasing or management offices and residential amenities (e.g. health/fitness, meeting/activity room, storage) in mixed-use buildings to no more than 15% of the ground floor; 2. Loosen restrictions on resale/stores as a permitted use; 3. Allow retail businesses to use a limited percentage of their floorplates for other purposes besides sale of merchandise to on-premises customers; and 4. Provide greater clarity and less room for subjectivity in the distinction between "fast food", which is prohibited, and "fast-casual", which is permitted.	Short to Medium Term (1-3 years)	City of Winter Park, with input and buy-in from Orange Avenue landlords/merchants.	Chief arguments for each of these proposed modifications are as follows: 1. Such tenancies do not typically generate much street-level interest in, widespread excitement about or destination appeal for the district, nor do they provide more than limited spin-off for nearby businesses; 2. Vintage/resale has long been popular among neo-hipsters while no longer carrying quite the same stigma more broadly (as evidenced by the proliferation of stores selling "designer consignment"); 3. With the rise of "omni-channel" business models, retailers are increasingly valuing and utilizing brick-and-mortar spaces for multiple purposes, including fulfillment for on-line delivery; and 4. Gourmet "foodie" dining among younger generations often takes a fast-casual form (without the attributes of traditional "fine" dining, e.g. reservations, waiters, white tablecloths, etc.), yet differentiation vis-à-vis fast food that is based solely on what constitutes "freshly-prepared, higher-quality food" leaves prospective tenants vulnerable to personal tastes and discretion, resulting in a lack of predictability that can act as a deterrent.
Off-Street Parking in the Orange Avenue Corridor – **CAPITAL IMPROVEMENTS**	With the help of an appropriate consultant, consider a special assessment district that identifies and secures a centrally-located parcel for as well as funds the design, construction and management of a public parking structure in or near the Orange Avenue Corridor; and, if realized, relax requirements for off-street parking in said Corridor (e.g. for redevelopment that adds square footage, change-of-use to food and beverage, etc.) as well as extend the distance threshold from 750 to 1,320 feet.	Long Term (3+ years)	City of Winter Park, with input and buy-in from Orange Avenue landlords/merchants.	Redevelopment and re-tenanting in the corridor is currently challenged—and traffic congestion exacerbated—by a number of undersized, under-parked properties, while the benefits of a new parking scheme will no doubt accrue to the owners and tenants of the same; planners and urban designers routinely define "walking distance" as a quarter-mile radius, which translates to 1,320 feet.

CONTINUATION OF **IMPLEMENTATION MATRIX**

Area – Bucket	Specific Action Item(s)	Time Horizon	Chief Sponsor(s)	Context/Commentary
Zoning for 17/92 and Fairbanks Avenue – **ZONING**	Consider changes in the ordinance which create different rules for 17/92 (north of Orange Avenue) and Fairbanks (west of Denning Avenue), both of which are largely designated as Commercial (C-3): **17/92** – as the "A" commercial corridor, with the following permitted: theaters, restaurants, bars, taverns and cocktail lounges, fitness facilities, exercise or health clubs, buildings over 10,000 sq ft (or any addition over 500 sq ft to such a building, etc.); with the following requiring conditional use permits (and prohibited along the frontage): personal or business services (including banks or similar financial institutions), business, financial, governmental, medical and professional offices, agencies and clinics, blueprinting, photocopying and printing offices, animal hospitals, veterinary clinics and other animal case businesses; and with the following prohibited in any location: funeral homes and cemetery monument sales, churches, community clubs, nonprofit organizations' halls/lodges and schools, publicly-owned recreational facilities, repair and servicing of motor vehicles (also, as an ancillary use to a vehicle sales showroom), paint and body shops, office/showroom/warehouse uses, conditional uses provided in the R-3 and R-4 districts; and **Fairbanks Avenue** – as the "B" commercial corridor, with the same as the existing Commercial (C-3) zoning except that the following are also permitted: fitness facility, exercise or health clubs; Shopping Centers designated as Commercial (C-1): revise in accordance with the above classifications, depending on corridor.	Long Term (3+ years)	City of Winter Park, with input and buy-in from landlords/merchants on 17/92 and Fairbanks Avenue.	1) 17/92 and Fairbanks Avenue currently occupy very different positions in the ecology and hierarchy of Winter Park retail, suggesting different approaches to land use and zoning, with the following goals: (i) reserving the precious real estate along the space-constrained "Golden Mile" (and especially the frontage) for the tenancies with the greatest need for such visibility and access as well as the most potential for generating widespread interest; and (ii) establishing Fairbanks Avenue as a more viable alternative for uses prohibited, requiring a conditional use permit or otherwise unable to secure locations along 17/92; In addition, the requirement for a conditional use permit for any building of 10,000 sq ft or more seems overly restrictive for a corridor like 17/92 with so many big and medium-box uses; and 2) With the rise of "omni-channel" business models, retailers are increasingly valuing and utilizing brick-and-mortar spaces for multiple purposes, including fulfillment for on-line delivery and distribution for wholesale -- which seems especially appropriate for commercial corridors with large-floor plate tenancies, surface-parking fields, loading docks, etc.
Approvals and Permitting Process – **INCENTIVES**	Undertake a comprehensive review of the current process that prospective retail tenants must navigate in order to secure necessary approvals and permits, including (but not limited to) consideration of a new, more flexible approach for evaluating proposed uses and tenancies that acknowledges today's rapidly-evolving and fiercely-competitive retail industry.	Long Term (3+ years)	City of Winter Park, with requisite buy-in from relevant stakeholders as part of a mandated process.	Prospective retail tenants frequently cite approvals and permitting as a decisive factor in where they do and do not choose to locate, and can be deterred by processes which provide ample opportunity for elected officials and staff planners to inject their subjective tastes and preferences into the process; at the same time, the conventional approach of prohibiting any use not specifically enumerated in (a periodically-updated) zoning code has always been unable to "keep up" with changes and innovations in retail tenancy -- and never more so than now, with new concepts and formats (as well as combinations thereof) emerging at an especially fast clip, and with the need to stay ahead of and differentiated from the competition (both physical and digital) becoming ever more urgent.

PROJECT UNDERSTANDING

In March 2022, the City of Winter Park ("Client") hired MJB Consulting, as a sub-consultant to GAI Consultants' Community Solutions Group ("Project Team"), to undertake an extensive scope-of-work designed to arrive at and secure buy-in to retail strategies for Winter Park's six main business districts and commercial corridors, listed below and illustrated on the map on the following page:

- Park Avenue and Side Streets
- Hannibal Square
- Fairbanks Avenue
- Orange Avenue
- 17/92 ("The Golden Mile")
- Aloma Corners

Phase I in this scope-of-work analyzed retail conditions, opportunities and challenges, culminating in a memorandum that assessed whether Winter Park's retail mix has been fully leveraging its synergistic potential and, if not, what market and real estate-related factors might be responsible.

As part of this exercise, the Project Team conducted interviews with the following[1]:

- Teri Gagliano, Chez Vincent
- John Crossman, CrossMarc Services
- Damien Madsen, Harbert Realty Services
- Darryl Hoffman, JLL
- Sam Stark, Rollins College
- Dan Butts, Crossman & Company
- Tracy Brand-Liffey, New General
- David Gabbai, Colliers
- Matthew McKeever, Colliers
- Drew Hill, Hill Gray Seven
- David Albertson, Park Avenue landlord
- Brenda Carey, Great American Land Company
- Palmer Vietor, Owens Realty Capital
- James Petrakis, The Ravenous Pig/ Swine & Sons

In addition, the Project Team met with and presented to the members of the Economic Development Advisory Board ("EDAB") on various occasions throughout 2022—July, September, and October—integrating the EDAB's input and feedback into our ultimate findings and conclusions.

In Phase II, the Project Team has developed a host of recommendations that the City and various other stakeholders might consider in the name of more fully realizing such retail potential.

These recommendations are based on our extensive research and national experience as well as initial input and feedback from the EDAB (at a March 2023 meeting) and the City's Planning Department.

[1]The Project Team also reached out to a number of other stakeholders who did not respond.

Image Source: City of Winter Park

Note, however, that these recommendations are *preliminary*. There are many more stakeholders to interview for comments and buy-in. Even then, each of the individual action items would need to travel through the same mandated approval processes as any other such proposals.

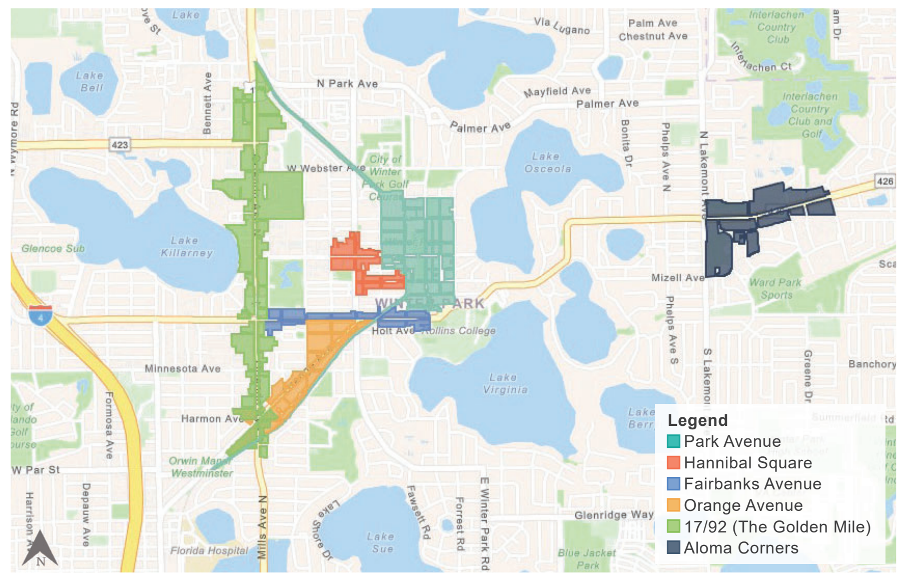
The following *Implementation Matrix* provides detail on these recommendation items, including the following:

- Area – Bucket, with recommendations assigned to one of four "buckets", which include: (1) Marketing, (2) Incentives, (3) Zoning and (4) Capital Improvements.
- Specific Action Item(s), with specifics on what the proposal consists of and requires.
- Time Horizon for Implementation – ranging from 0 to 1 years (short-term), 0 to 3 years (short- to medium-term) and 3+ years (long-term), as based on the need for adjustments or deeper dives, the process for securing buy-in as well as the practicalities of capacity, timing and priority.
- Chief Sponsor(s), including those spearheading execution, supplying funding and/or otherwise impacted.
- Context/Commentary, summarizing the reasoning and rationale.

Briefly, the three most immediate priorities that emerged from this exercise are as follows:

1. Creation and dissemination of retail marketing collateral.
2. Tweaks and adjustments to C-2 Zoning
3. Incentives for comparison goods retailers in Park Avenue Corridor.

Focus Districts and Corridors in Winter Park



CITY OF WINTER PARK
RETAIL STRATEGIES

PHASE II IMPLEMENTATION MATRIX I JUNE 2023

Prepared by MJB Consulting and GAI Consultants, Inc.
Prepared for City of Winter Park, Florida

CITY OF WINTER PARK
RETAIL STRATEGIES

PHASE II IMPLEMENTATION MATRIX I JUNE 2023

ACKNOWLEDGMENTS

Kyle Dudgeon | Assistant Division Director, *Economic Development/CRA*
Peter Moore | Division Director, *Office of Management and Budget*

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9. Winter Park Market Area- MJB Phase 1 excerpt

Questions

a. Why does polygon stop at Colonial? What economic impact do College Park, Thornton Park and Lake Osceola play (since there is no definitive restaurant corridor on central Orlando)? Do they go to Sand Lake Rd instead?
b. Are there under-represented sectors?

Demographics, Psychographics and Trade Areas

To better understand the demographic characteristics of Winter Park residents, we retrieved and interpreted data from ESRI, one of the industry's major data-mining companies that provides 2022 estimates on the basis of information from the U.S. Census Bureau and other sources as well as its own proprietary methodology.

	Winter Park (City)	Orlando CBSA
Population	30,734	2,799,598
Median Household Income	**$92,058**	$67,299
% HH Earning $150K+	**32%**	15%
Median Home Value	**$464,169**	$288,826
% Homes Valued $750K+	**26.1%**	3.5%
% B.A. or Higher	**62%**	35%
% Working in Management, Business, Financial or Professional Occupations	**62%**	40%

Table: Winter Park – Demographic Profile
Source: ESRI, MJB Consulting

Not surprisingly, Winter Park's population boasts much higher household incomes and home values than metro Orlando as a whole, a reflection in part of its educational attainment and occupational profile.

Winter Park is also atypical psychographically for Central Florida, closer in its lifestyles and sensibilities to the communities that predominate along the so-called "Acela Corridor" in the Northeast (from Boston to Washington, D.C.) as well as coastal California.

The biggest spenders are middle-aged married couples who own their homes. Well-educated and well-traveled, they are patrons of "high" culture. As consumers, they favor upscale goods and services but will also shop at select value retailers like Costco, Target and Trader Joe's.

The residents of Winter Park, however, account for just a small percentage of what would properly be understood as its "trade area."

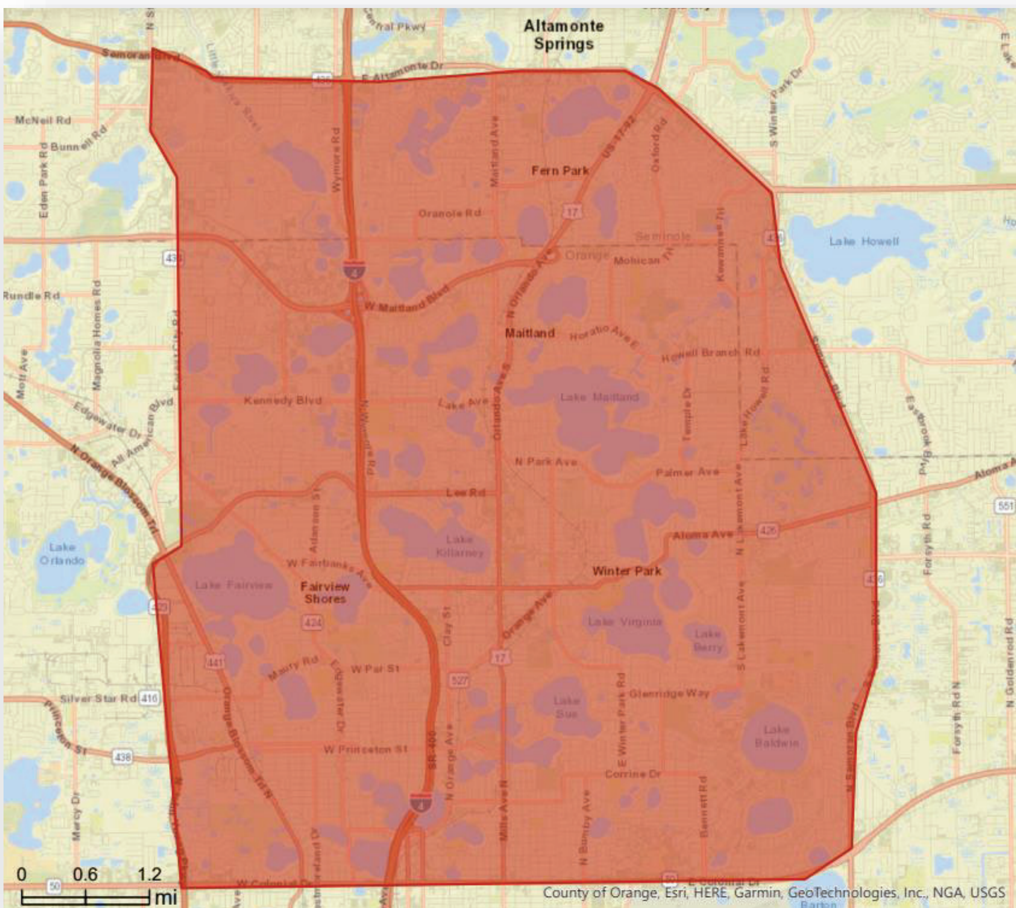
A term of art in the retail industry, trade area refers to the rough geography or polygon within which a given location derives roughly 70% of its customer base. Put in simple terms, it is meant to represent that location's most frequent and reliable patrons. And it does *not* necessarily conform to municipal boundaries.

Moreover, trade areas vary by retail category. For goods and services generally understood as "convenience-driven", like basic groceries, prescription drugs and dry cleaning, the relevant geography tends to be local, and the resulting polygon, relatively small. After all, why drive across town for a CVS if there is one just around the corner?

For “comparison goods” such as apparel, footwear or home furnishings, on the other hand, consumers will typically gravitate to centers or districts where they can peruse – indeed, “compare” -- multiple options at a range of styles, price points and levels of quality.

In such categories, there are increasing returns to scale: as a given cluster grows in size, its draw expands both in penetration and geographic reach. Shoppers, for instance, will bypass a standalone clothier and drive further afield for a larger concentration of such stores.

Winter Park is very fortunate that it can pull from well beyond its borders and should welcome such patronage with open arms, for a population of just 31,000 represents but a fraction of the consumer demand needed to support its current inventory of retail space.



Winter Park - Trade Area Polygon
Source: MJB Consulting, GAI Consultants, ESRI

For the sake of this analysis, we have collaborated with GAI Consultants to draw the following polygon as a representation of Winter Park’s true trade area. Its boundaries are defined as SR 536 to the north, SR 536 to the east, SR 10 (Colonial Drive) to the south and SR 423 / SR 434 to the west.

Keep in mind that this polygon is *not* meant as a precise rendering, and should therefore not be evaluated as such. Indeed, given what was just said about the range of retail categories, such exactitude is not even possible. Nor, for that matter, is it necessary, for the placement of a boundary along one street versus another a few blocks over is unlikely to make much of a difference. Again, the point here is to arrive at a *general* understanding of those residents whom a given location draws most frequently and reliably, for *roughly* 70% of its sales.[2]

	Winter Park Trade Area	**Winter Park (City)**
Population	161,634	30,734
Population Change (2010 to 2022)	+24,105	+3,018
Median Household Income	$76,732	$92,058
Median Home Value	$359,662	$464,169
% Working in Management, Business, Financial or Professional Occupations	53%	62%
Median Age	40.6	45.5
% Aged 25 to 44	29%	23%
% Aged 65+	19%	24%

Table: Winter Park Trade Area – Demographic Profile
Source: ESRI, MJB Consulting

Comparing the demographic data of Winter Park's trade area to that of the political jurisdiction, a few significant differences emerge.

One, not only does Winter Park itself represents less than 20% of the trade area's consumer demand, but also, that share continues to decline, as the city accounted for just 12% of the polygon's population growth over the last twelve years. In other words, the communities outside Winter Park proper will loom even larger in the years ahead.

Two, those communities are characterized by comparatively weaker demographics, resulting in trade area medians that, while still well above the metro's, are considerably lower than the city's. This would imply somewhat more of a value orientation than one might associate with Winter Park.

[2] From the other extreme, one might also wonder why the trade area does not comprise the entire metropolitan area. After all, Winter Park pulls from all of Greater Orlando. However, if the polygon were extended across too large of a geography, the data would start to become meaningless. Not only would it include a swath of people who visit Winter Park sparingly, but also, it is large and varied enough that one could find evidence of almost any consumer submarket and for virtually any niche opportunity.

Three, the age profile beyond the city's boundaries is much younger, with higher percentages in their 20's and 30's as well as lower ones for seniors. This points to an emerging trend, and indeed a larger opportunity, for Winter Park itself, especially along the Orange Ave corridor.

Looking more closely at the psychographics, this cohort can bring an entirely new dimension to Winter Park's retail mix and identity. It consists primarily of Millennial singles earning moderate incomes today yet well-educated and upwardly mobile. Early adopters drawn to novelty, they value the creative impulse, often gravitating to distinctive "craft" and artisan businesses.

The presence of such "Millennial neo-hipsters" within the trade area is not entirely surprising, given that the geography encompasses several Orlando neighborhoods to the north of Downtown where that psychographic appears to have concentrated in the last couple of decades, including Mills 50, Milk District, Audubon Park, College Park and Ivanhoe Village.

Of course, trade area residents constitute just one (albeit the most significant) of the consumer submarkets that inform Winter Park's retail potential.

As noted earlier, Winter Park – especially Park Ave – is also a destination for out-of-town tourists. And while the family-oriented theme park experience is a *very* different one, it is safe to assume that at least some percentage of those visitors would also be interested in what Winter Park has to offer. Even if just 1%, that would equal 500,000 of Disney World's 50 million annual guests.

According to ESRI data, Winter Park also boasted 35,348 daytime workers in 2022, including significant numbers of well-paid employees in professional, scientific and tech services (5,094), finance, insurance and real estate (4,254), information (1,285) as well as medicine (with AdventHealth Winter Park) and higher education (with Rollins College).

Finally, Rollins College reported an enrollment of roughly 3,100 students[3] in the 2020-2021 school year, 2,800 of them full-time and 2,500 of them undergraduates. Its reputation as a school for "rich kids" notwithstanding, 85% receive some form of financial aid. Coeds are once again required to live on campus for at least three years, and the 17 residence halls contained a total of 1,554 beds in 2021.[4]

[3] Note that, except for the (presumably) tiny percentage who commute from housing elsewhere, students – even those living in "group quarters" (i.e. residence halls) – are already counted in the overall Winter Park population.
[4] https://www.thesandspur.org/record-number-of-students-live-on-campus/.

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Memorandum

To:	Kyle Dudgeon Assistant Division Director, Economic Development/CRA City of Winter Park
	Peter Moore Division Director, Office of Management & Budget City of Winter Park
Cc:	Owen Beitsch Senior Director, Economic and Real Estate Advisory Services GAI Consultants Inc.
From:	Michael Berne President, MJB Consulting
Re:	Phase I Executive Summary Memo (Draft #2)
Date:	February 3, 2023

In March 2022, the City of Winter Park hired MJB Consulting, as a subconsultant to GAI Consultants Inc.'s Community Solutions Group, to undertake an assessment of retail

Economic
Development
Advisory Board

agenda item
6.a

item type
Staff Updates

meeting date
July 9, 2024

prepared by
Kyle Dudgeon, Assistant Division Director of Economic Development/CRA

approved by
Peter Moore, Director of Office of Management and Budget

subject
EDAB Commercial Performance Report

motion | recommendation
N/A

background
Monthly reports as requested

alternatives | other considerations

fiscal impact

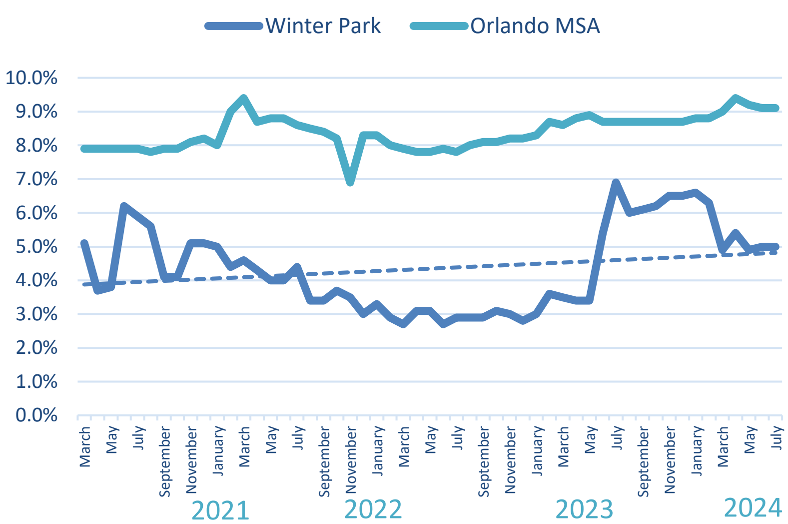
attachments
1. EDAB Commercial Performance Report_July 2024
2. Ped Count_Ecocounter July 2024

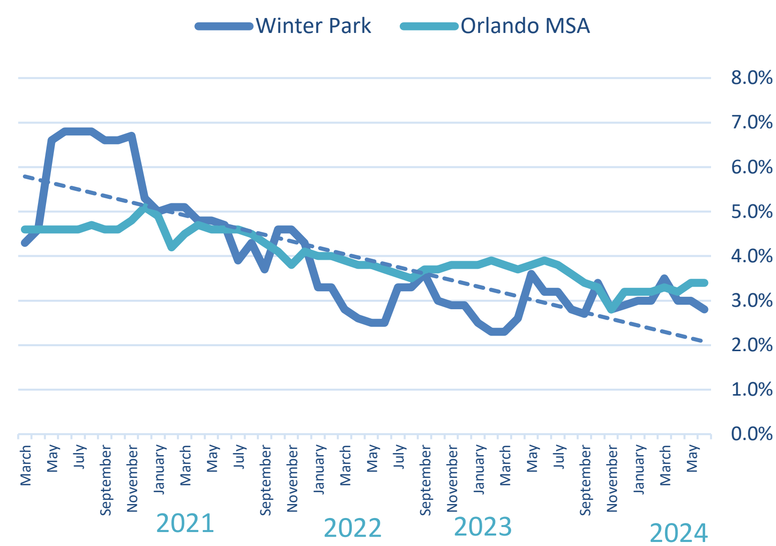
Commercial Performance Report 7/24

Full list of quarterly reports including annually recorded metrics are available at www.cityofwinterpark.org/pm

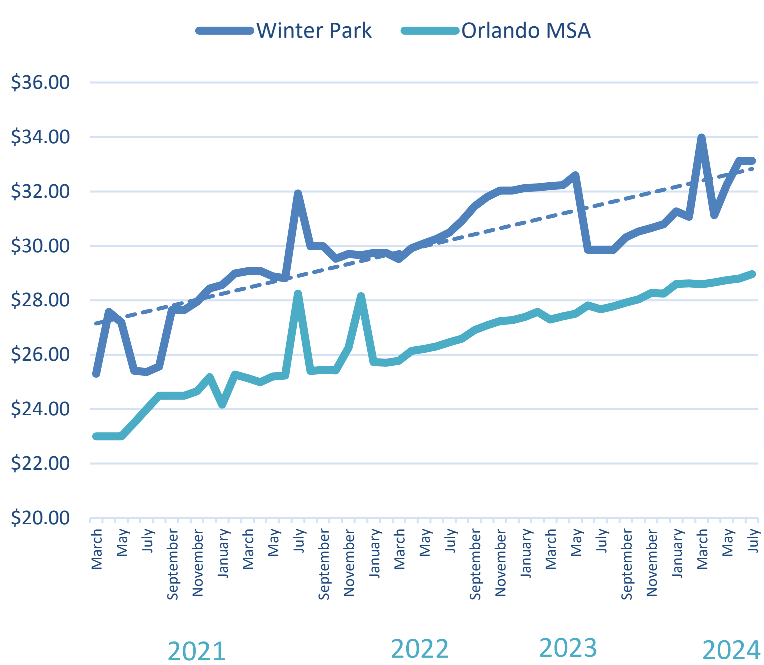
Sources: ESRI, CoStar, BLS

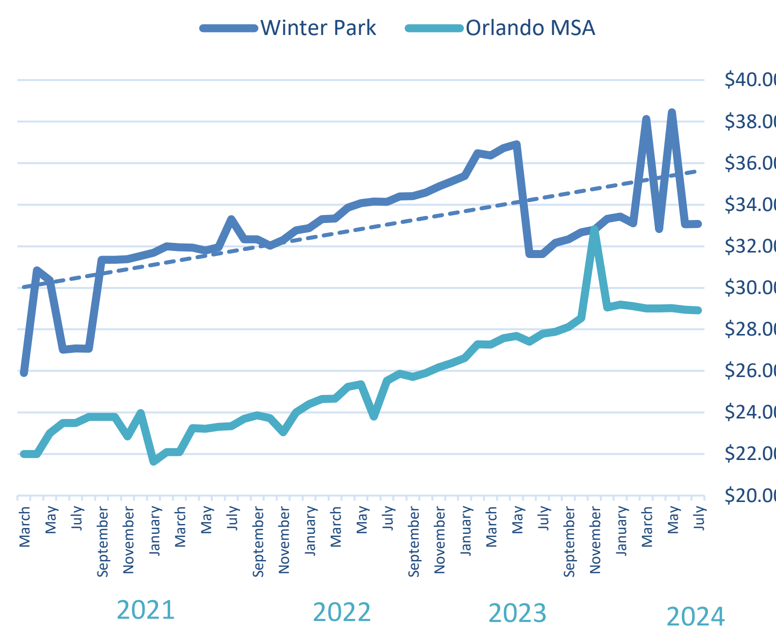
OFFICE — Vacancy — RETAIL





Rental Rate





City of Winter Park

Kyle Dudgeon
07/01/2024

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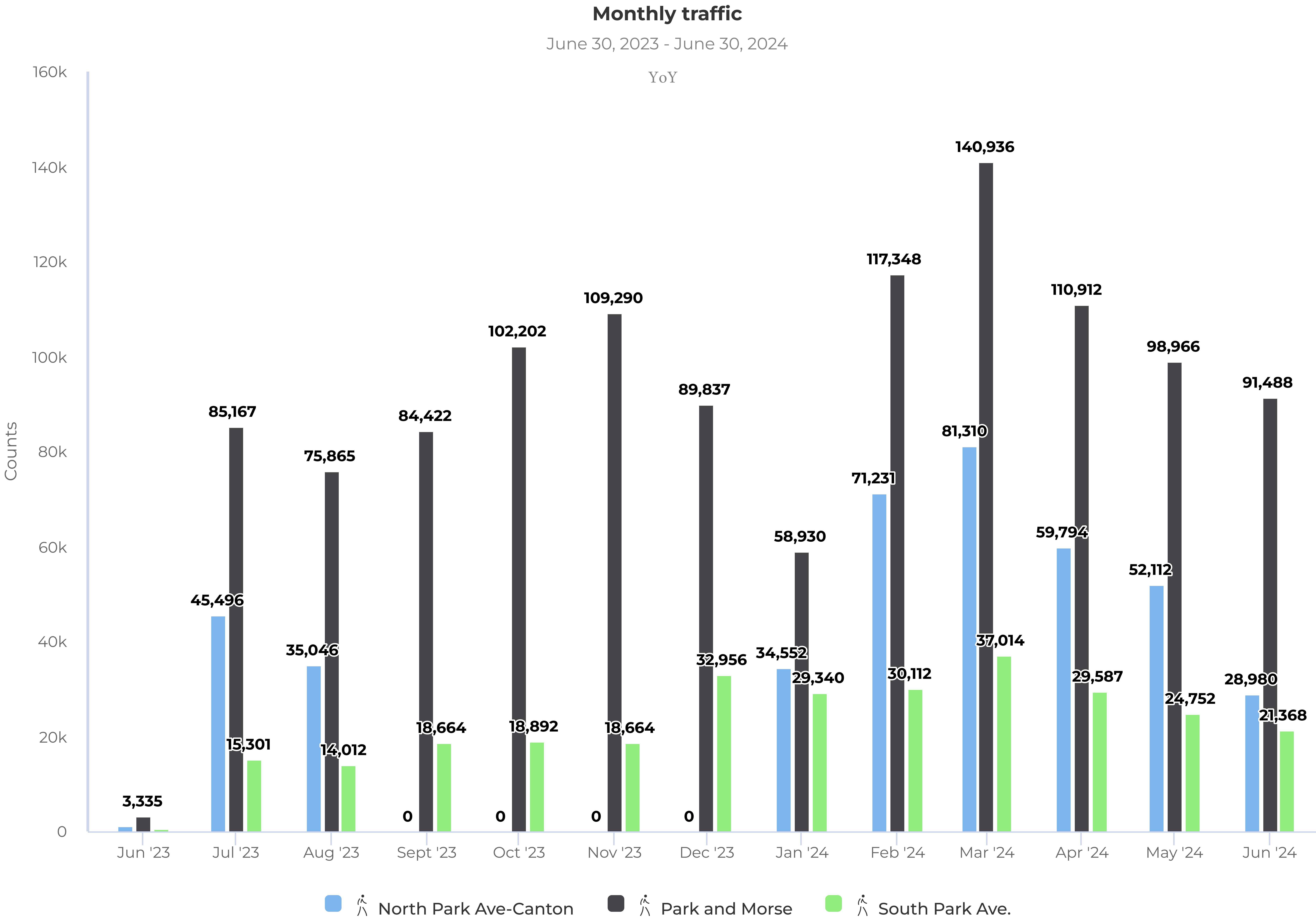

Monthly traffic
June 30, 2023 - June 30, 2024
YoY
Counts
160k
140k
120k
100k
80k
60k
40k
20k
0
3,335
45,496
85,167
15,301
35,046
75,865
14,012
0
84,422
18,664
0
102,202
18,892
0
109,290
18,664
0
89,837
32,956
34,552
58,930
29,340
71,231
117,348
30,112
81,310
140,936
37,014
59,794
110,912
29,587
52,112
98,966
24,752
28,980
91,488
21,368
Jun '23
Jul '23
Aug '23
Sept '23
Oct '23
Nov '23
Dec '23
Jan '24
Feb '24
Mar '24
Apr '24
May '24
Jun '24
North Park Ave-Canton
Park and Morse
South Park Ave.

Key Figures

June 1, 2024 → June 30, 2024

Total

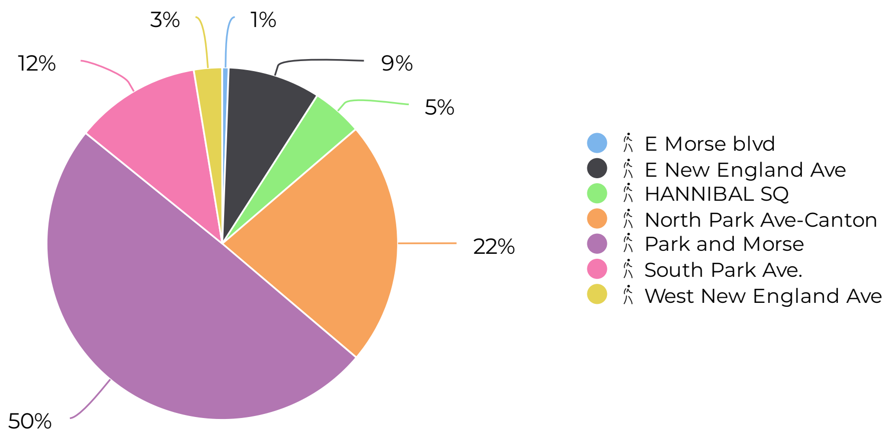
170,435

Peak Day

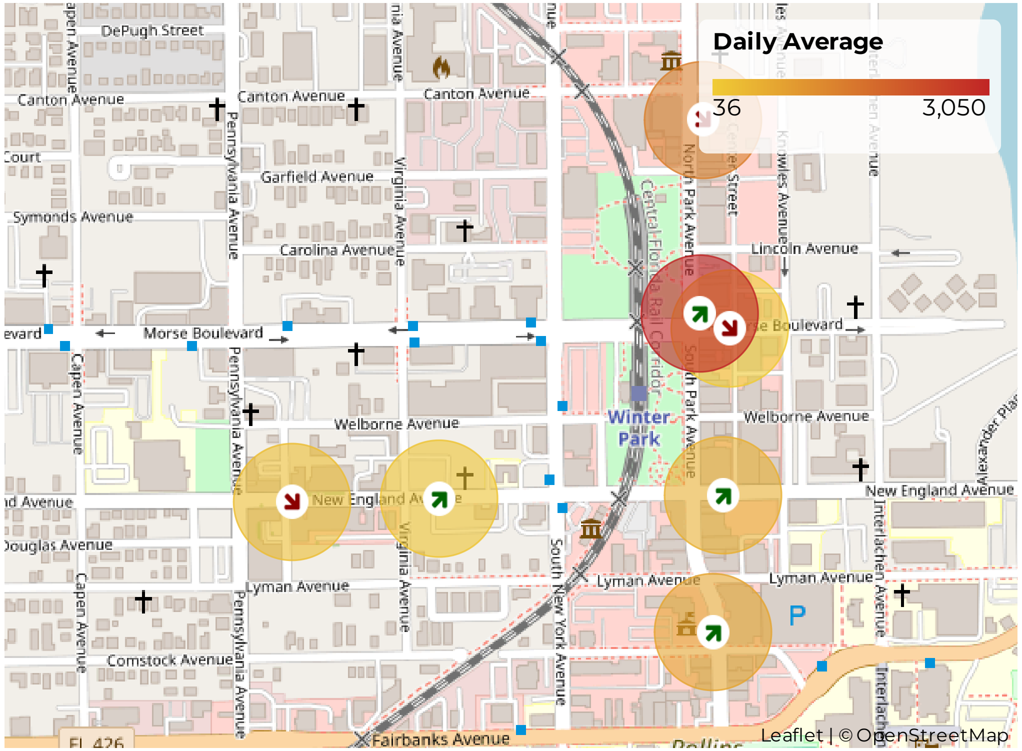
Saturday
Jun 15, 2024

9,331

Distribution



Key Figures Map

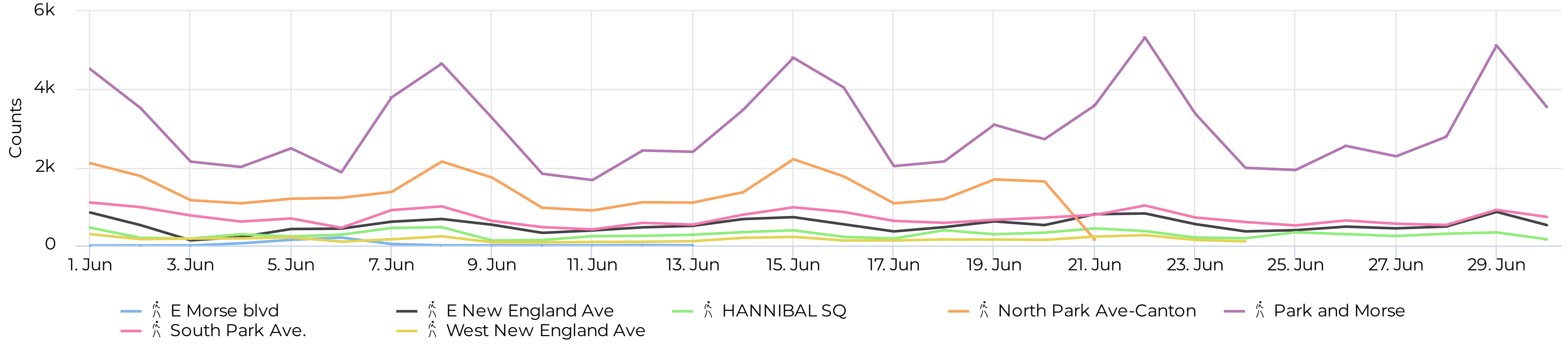


Compared to 06/03/2023 → 07/02/2023

Key Figures

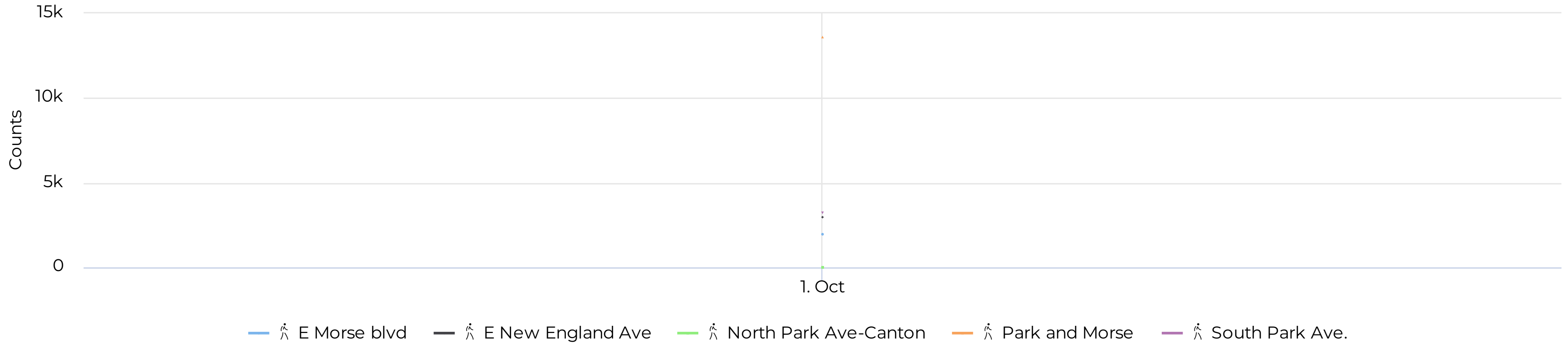
June 1, 2024 → June 30, 2024

Daily traffic



Monthly traffic

10/07/2023 → 10/08/2023

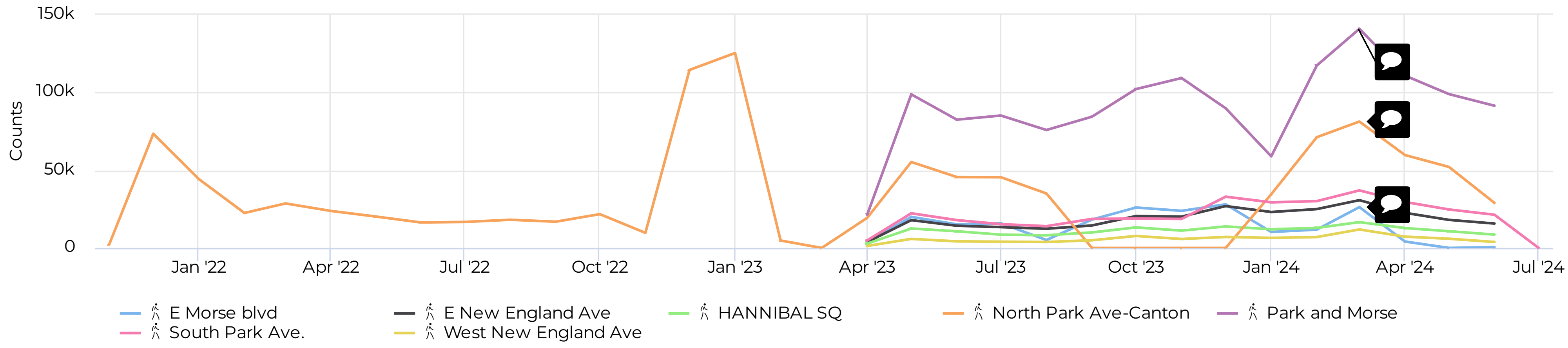


Key Figures

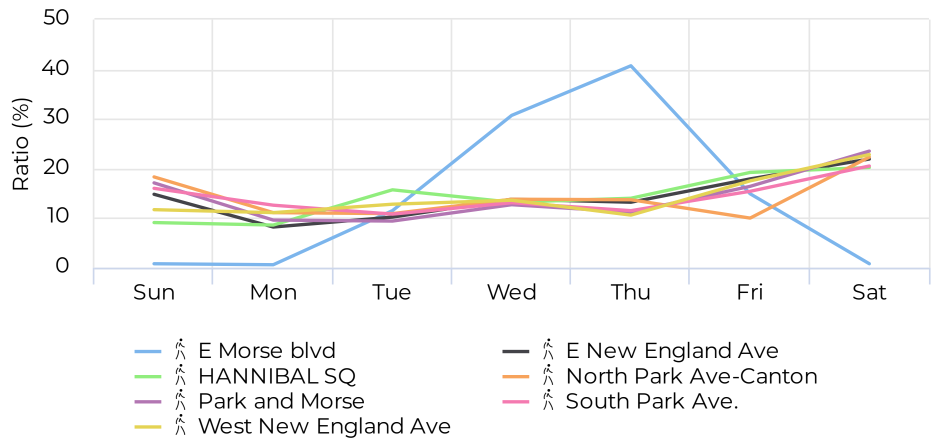
June 1, 2024 → June 30, 2024

Monthly traffic

Whole Period

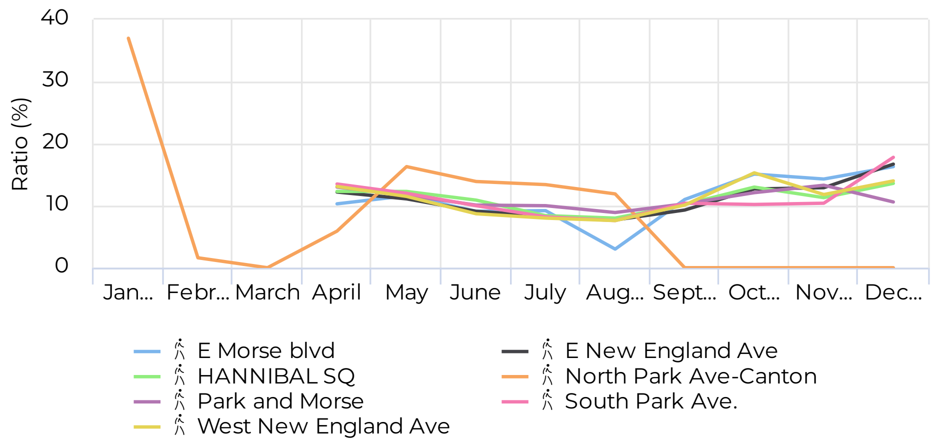


Daily Profile



Monthly Profile

01/01/2023 → 12/31/2023

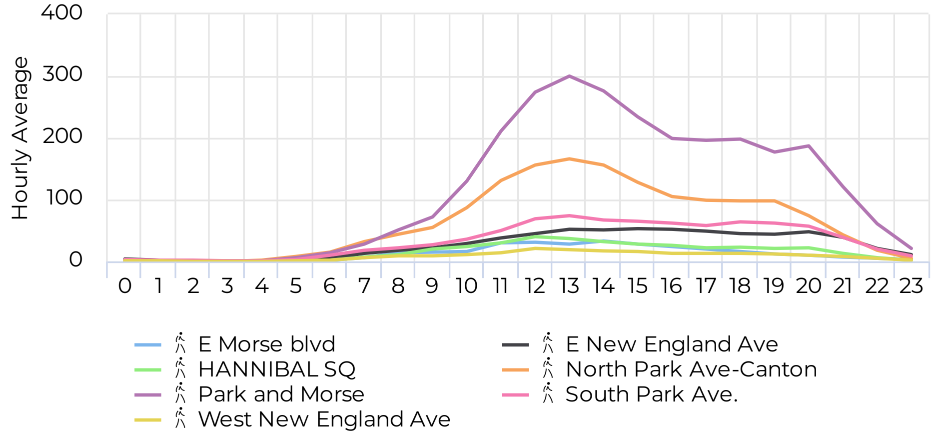


Key Figures

June 1, 2024 → June 30, 2024

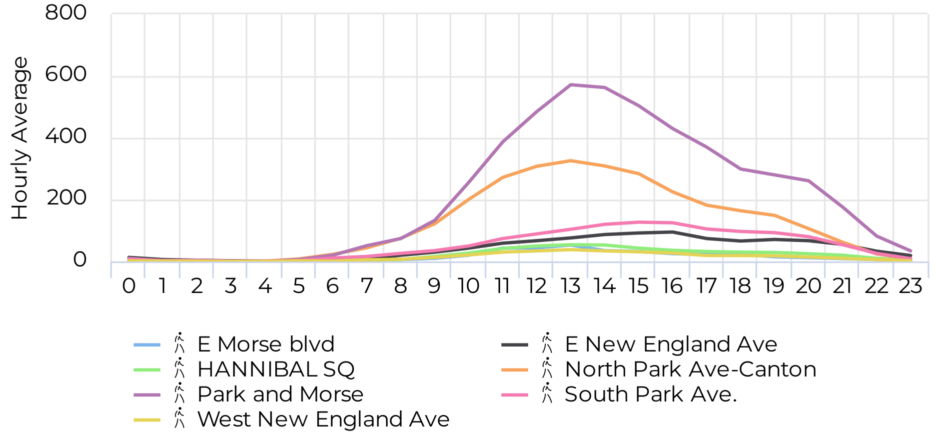
Hourly Profile - Weekdays

01/01/2024 → 06/30/2024



Hourly Profile - Weekend

01/01/2024 → 06/30/2024



Key Figures

June 1, 2024 → June 30, 2024

Key Figures Summary

Site	Daily Average ▼		Peak Day		Peak Count	
Park and Morse	3,050	▲ 8.4%	Sat Jun 22, 2024	Sat Jun 24, 2023	5,328	▲ 9.3%
North Park Ave-Canton	1,380	▼ -10.0%	Sat Jun 15, 2024	Sat Jun 24, 2023	2,209	▼ -17.6%
South Park Ave.	712	▲ 20.2%	Sat Jun 1, 2024	Sun Jun 18, 2023	1,102	▲ 34.4%
E New England Ave	523	▲ 9.4%	Sat Jun 29, 2024	Sat Jun 17, 2023	861	▲ 17.0%
HANNIBAL SQ	286	▼ -17.6%	Sat Jun 8, 2024	Sat Jun 17, 2023	468	▼ -12.4%
West New England Ave	160	▲ 13.4%	Sat Jun 1, 2024	Sat Jun 3, 2023	290	▲ 22.4%
E Morse blvd	36	▼ -92.9%	Thu Jun 6, 2024	Sat Jun 10, 2023	203	▼ -76.9%

Compared to 06/03/2023 → 07/02/2023

Economic
Development
Advisory Board

agenda item
6.b

item type
Staff Updates

meeting date
July 9, 2024

prepared by
Kyle Dudgeon, Assistant Division Director of Economic Development/CRA

approved by
Peter Moore, Director of Office of Management and Budget

subject
Generic WP Banners

motion | recommendation
N/A

background
The ED/CRA department runs the banner program to help promote the economic vitality of the city as well as offer opportunities for city and non-profit partners to showcase upcoming events. During times where no banner applications have been submitted, staff is considering a generic banner to add charm and culture to the city. Staff is requesting the board to opine on two such options for generic banners for insight and comment.

alternatives | other considerations

fiscal impact

attachments
1. City Banner Option II 23.125x51
2. City Banner Option III 23.125x51

WP