



Economic Development Advisory Board Regular Meeting

Agenda

August 8, 2023 @ 8:15 am

City Hall - Commission Chambers

401 S. Park Avenue

Winter Park, FL

welcome

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assistance & appeals

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please note

Times are projected and subject to change.

-
1. **Call to Order**
 2. **Consent Agenda**
 - a. [Approve the minutes of the regular meeting June 13, 2023](#) 1 minute
 3. **Public Comments (for items not on the agenda): Three minutes allowed for each speaker**
 4. **Action Items**
 - a. [National Entrepreneurship Center pilot project](#) 20 minutes
 5. **Non-Action Items**
 - a. [EDAB Retail Strategies Report - Commission Feedback](#) 25 minutes
 6. **Staff Updates**
 - a. [EDAB Commercial Performance Report](#) 5 minutes
 7. **Board Comments**
 8. **Upcoming Agenda Items**
 9. **Adjournment**

item type	Consent Agenda	meeting date	August 8, 2023
prepared by	Tatia Ghviniashvili	approved by	
board approval			
strategic objective			

subject

Approve the minutes of the regular meeting June 13, 2023

motion / recommendation

background

alternatives / other considerations

fiscal impact

ATTACHMENTS:

Draft Minutes.pdf



Economic Development Advisory Board Meeting Minutes

June 13, 2023 at 8:15 a.m.

City Hall, Commission Chambers
401 S. Park Avenue | Winter Park, Florida

Present

Sarah Grafton, Kevin Mcclanahan, Tracy Liffey, Elijah J. Noel and Ginny Enstad;
Virtually: Drew Madsen; Board Coordinator Tatia Ghviniashvili.

Absent

Betsy Gardner Eckbert.

Staff Present

Assistant Division Director of Economic Development/CRA Kyle Dudgeon; Budget & Management Division Director Peter Moore; Economic Development/CRA Coordinator Anne Sallee.

1) Call to Order

Chair Sarah Grafton called the meeting to order at 8:20 a.m.

- a. Select Chair and Vice Chair

Motion made by Kevin Mcclanahan to re-elect Sarah Grafton as Chair; seconded by Ginny Enstad. Motion carried unanimously with a 4-0 vote.

Motion made by Ginny Enstad to elect Tracy Liffey as Vice Chair; seconded by Kevin Mcclanahan. Motion carried unanimously with a 4-0 vote.

2) Consent Agenda

- a. Approve the minutes of regular meeting May 9, 2023

Motion made by Kevin Mcclanahan to approve the minutes as presented; seconded by Tracy Liffey. Motion carried unanimously with a 4-0 vote.

3) Public Comments (for items not on the agenda):

Phil Anderson, 1621 Roundelay Ln., gave brief comment on the Retail Strategies Report and suggested the board/staff consider including an appendix with Phase I findings for the City Commission to reference when reviewing the report.

4) Action Items

- a. Approval of Retail Strategies Report

Elijah J. Noel arrived at 8:23 a.m.

Staff gave a brief overview of the report thus far, and highlighted that some findings from Phase I will be included as an appendix. Necessary modifications were made based on board feedback at previous meetings and the finalized report stands as a digestible deliverable which includes specific actions, time horizons, chief sponsors, and context/commentary. At this time, approval for recommendation to the City Commission is sought from the board. Michael Berne, MJB Consulting, further noted that board comments were considered and adjustments were made to organize and prioritize the content of the report.

The floor opened for discussion and the board made various comments and suggestions. One suggestion was to include an assumption based off tools already available such as traffic counters when looking at marketing campaigns. Further questions were asked about the data presented in the report, and staff agreed to make minor changes to formatting for purposes of clarity. The board also noted that the report contains a large number of suggestions and insights for Park Avenue and Fairbanks Avenue, neglecting other areas discussed such as Hannibal Square, Aloma, etc. A discussion followed and staff agreed to include an underscore in the guiding principles which notes that there are visions for every corridor, and the specific action items reflect not necessarily the relative importance of any one district versus any other. Staff will also adjust the Chief Sponsor section to clarify that Park Avenue is working together with the Chamber of Commerce and the City as part of a joint effort.

Motion made by Sarah Grafton to recommend for approval to the City Commission the Retail Strategies Report with the amendments presented by the board; seconded by Ginny Enstad. Motion carried unanimously with a 5-0 vote.

5) Non-Action Items

There were none.

6) Staff Updates

a. EDAB Commercial Performance Report

Traditional reports were presented, highlighting healthy office and retail rental rates and vacancies. Per previous meeting discussions, pedestrian counters were successfully installed in Hannibal Square.

Staff gave a brief introduction to a new pedestrian counter technology, Placer ai., which is a foot traffic analytics platform that provides insights into the offline

behavior of consumers, including visitor routes, time duration, favorite sports, etc. Placer ai. can be used to understand what activity and economic vitality looks like and provide dimension to foot traffic data.

A brief discussion ensued and the board asked a few clarifying questions.

b. Denning Wi-Fi Project Update

Per a discussion held at the April 2021 meeting, of the board approving a grant scope for public Wi-Fi for Denning Dr., staff was successful in the application and attained \$125,000 in grant funding. A vendor has been selected and the work on the project has begun. Updates will be provided as needed.

7) Board Comments

There were none.

8) Upcoming Agenda Items

After a brief discussion, the board agreed to cancel the July 11 meeting in favor of August, in order to give staff sufficient time to review City Commission feedback on the Retail Strategies Report and start work on a framework to then present to the board.

9) Adjournment

The meeting adjourned at 9:07 a.m.

Minutes approved by the board on _____.
/s/ Tatia Ghviniashvili, Board Coordinator

item type	Action Items	meeting date	August 8, 2023
prepared by	Kyle Dudgeon	approved by	
board approval			
strategic objective			

subject

National Entrepreneurship Center pilot project

motion / recommendation

Approve as requested

background

The 2021 EDAB strategic and action plan describes the opportunity to evaluate new programs for expanding businesses in Winter Park (Focus Area 3, strategy 1) and to establish roundtable sessions with market and subject matter experts for educational outreach (Focus Area 4, strategy 1). Further, as part of their review of the 2022 retail strategies report last month, the Commission directed staff to find strategies for the development of small entrepreneurial, minority, and home based businesses.

Based on a review of city business licenses, for FY23 the city currently has over 200 businesses a home based license. In addition, ESRI business analyst software identifies over 200 businesses with less than 5 employees and 170 businesses with less than \$500k in sales volume within city limits.

Towards these ends, staff has had several conversations with the National Entrepreneurship Center (NEC) about opportunities for partnership over the past few months. The attached proposal outlines a 6 month pilot program intended on working with businesses to improve awareness of resource availability, technical skill, and financial acumen. The city has been able to partner on similar efforts in the past including closed admission receptions for the Rollins Empowering Good Program over the past year.

The proposal includes both workshops and one-on-one educational business programming for those seeking support. There is no cap on the number of businesses that can be included with a rolling acceptance window through the pilot period.

alternatives / other considerations

Amend the proposal

Do not consider the proposal

fiscal impact

\$10,000

ATTACHMENTS:

[City of Winter Park Proposal 7-27-23.pdf](#)



PROPOSAL FOR CITY OF WINTER PARK





July 27, 2023

Mr. Kyle Dudgeon
City of Winter Park - Economic Development Office
401 South Park Avenue
Winter Park, FL 32789

Dear Mr. Dudgeon:

As you may know, the National Entrepreneur Center (NEC) is one of Orlando's showcase facilities that embodies the spirit of entrepreneurial collaboration. Our "one stop shop" for all business needs, houses 18 resource partners, which provide the most comprehensive programming anywhere in the United States - and possibly the world.

This year the NEC celebrates 20 years of leading local economic growth in Central Florida, and we are excited about the prospects of growing our services directly into the City of Winter Park!

We understand the importance of closely aligning NEC services with the vision and goals of all our funding partners. Specifically in Winter Park, we'll work to complement and grow the existing business support services currently offered. Together we will take our expression of "Collaborative Impact" to another level.

Attached, please find a proposal with the breakdown of services we'd like to offer. As we discussed the narrative should capture the educational elements you'd like to offer your business community to help them grow.

To quote Henry Ford, "Coming together is a beginning, staying together is progress, and working together is success." I am personally excited at the opportunity to work with the City of Winter Park. Thank you in advance for your interest in working with the NEC. Please let us know if you have any questions or if we can ever be of any assistance to you.

Smile,

Belinda O. Kirkegard
President

City of Winter Park Proposed Funding Amount: \$10,000

Funding Term:
6-month pilot program

Funding Period:
10/01/2023 – 03/31/2024

Breakdown of Fund Utilization

Program / Initiative		Proposed Scope of Work	Funding Amount
1.	NEC Entrepreneurial Workshops	- Conduct an educational workshop(s) on how entrepreneurs/small business owners can utilize the BizLink Orange platform to start and grow a business. - Provide personalized action plans to business owners via Bizlink Orange portal. - Educational workshop(s) by Central FL International Trade Office to provide information and support to businesses interested in exporting their products and services. - Provider Winter Park Business owners international trade business coaching (in person & virtual sessions)	\$2,500
2.	Educational Business Programming	- Create a “Winter Park Business Academy”. - Ongoing curriculum which includes online educational programming that can be adjusted to meet the individual business owner’s needs. - One-on-one coaching for businesses as they progress through curriculum &/or regrouping sessions to help business owners implement what they’ve learned into their business model. - Team of SCORE coaches/mentors to provide free one-on-one coaching sessions to business owners throughout the duration of this program.	\$5,000
3.	UCF Sponsored Research	Required 25% for UCF Sponsored Research	\$2,500
Proposal Requirements		- To conduct seminars for entrepreneurs we will need assistance from the City of Winter Park, to provide training room/classroom space. - NEC would ask for support to enhance the marketing of all program components through any City of Winter communication methods available. <i>NOTE: The NEC fiscal agent (UCF), requires additional steps to formalize proposals. We will begin that process upon the City of Winter Park’s acceptance of this proposal.</i>	

About Us

The National Entrepreneur Center (NEC) is a one stop solution center for entrepreneurs and small businesses looking for resources to launch and grow businesses in Central Florida. Our center is home to 18 resource partners (non-profit technical service providers, business support organizations, microloan services and niche regional chambers of commerce) all under one roof. Together, we serve diverse communities with expert mentoring, technical coaching, and invaluable resources to help new businesses form and empower existing businesses to scale further at no or low cost.

The NEC's achievements during a 20-year history have been possible thanks to the generous support and trust of our financial sponsors. Sponsors and funders who share our collective mission have become the biggest drivers of our continued success in promoting and supporting entrepreneurship and small business development in Central Florida.

The NEC and its resource partners have a strong record of successes which includes:

- High-touch contacts made across the entire NEC's ecosystem average over 300,000 each year.
- Annually averaging the training or coaching of over 15,000 entrepreneurs.
- Over 288,000 entrepreneurs have been trained or counseled since our inception in 2003.
- Loan facilitation for over 2,700 businesses with a value of over \$320 million since 2003.
- Annually visited by national/international government delegations attempting to replicate this model.
- 2022 Angelou Economics NEC Impact Study proved ROI of over \$11 for every \$1 invested in the center.

Narrative of Proposed Winter Park Partnership:

There's nothing like making a difference in the lives of those around you. Since our inception, the NEC has remained steadfast in its mission to make a difference in growing our Central Florida local economy and we are committed to tailoring educational opportunities to Winter Park businesses in this partnership. This includes multiple touch points to connect with your entrepreneurs. We'd like to begin our partnership by offering NEC Entrepreneurial Workshops utilizing the highly skilled program managers of our BizLink Orange and Central Florida International Trade Office team.

BizLink Orange is the NEC's virtual platform. It is a powerful online tool that connects businesses to resources anywhere across the Central Florida 6-county region. The program was designed to assist companies in starting or growing their business. The How-to Business Guides provide expert guidance to start and grow a business, as well as learn about licensing requirements, government contracting, funding opportunities, certifications, and much more. This platform also includes a Resource Navigator, to find and connect with local business support organizations; a Business Calendar which highlights regional training seminars, and networking events; a portal for Personal Action Plan requests, which will yield a tailored business outline of next steps for that entrepreneur's business journey. In this Partnership, we'd like to offer a workshop(s) to the business community on all the free resources available to them. This would begin the conversation for the proposed "Winter Park Business Academy" which we'll expand a little further in this proposal.

Fun fact – 56% of the US companies that export have fewer than 20 employees. International trade is accessible to all companies with the tools we offer. The NEC's **Central Florida International Trade Office (CFITO)** provides comprehensive support to businesses interested in international trade. We offer tailored counseling, guiding small businesses in evaluating trade suitability, and enhancing export readiness. The office organizes impactful events (workshops and webinars) and delivers presentations around the region on a variety of trade topics. We also foster connections through hosting foreign delegations and introducing clients to resource providers (both public and private sector). CFITO also serves as the one-stop-shop for regional trade data and produces the Central Florida Export Report and Fact Sheets for specific sectors and markets. Should the City be visited by a particular foreign delegation, our office is always available to provide you with a quick one-page reference guide containing information on the types of business currently occurring within Central Florida. In this Partnership we'd like to host a workshop on international trade opportunities to get companies thinking global as a pathway to grow their business.

Additionally, the NEC with the support of our SCORE Resource Partner would like to offer a **“Winter Park Business Academy”** to help grow your local companies in any industry. This program would have a virtual educational program, as well as provide one-on-one coaching to entrepreneurs. We would start with the development of two (2) educational tracks: General Business educational content & Retail centric education based.

The General Business track is a 5-video series that would cover business education that applies to all industries – these are fundamental topics (like bookkeeping, human resources, etc.) which often small businesses skip over, or could benefit from a refresher, as they work to reinvigorate their business. The second track - Retail Business - would include those core elements plus items more unique to this type of industry (like storefront management, exporting products, etc.). This program would also provide one-on-one coaching opportunities for entrepreneurs as they need it. They would have access to a coaching session between video sessions, or at the pace they need, to provide them with expert guidance on implementing what they learned into their business model.

There would be no limiting caps on the number of businesses we would welcome to participate in the Winter Park Business Academy, or on the number of coaching sessions offered in total or to each company. Our objective, like yours, is to provide support to the business community to grow our local economy.

Separately, as you see below, the NEC is a collaborative organization that has 18 resident resource partners. If Winter Park were amenable, we’d like to allow our resource partners the opportunity to provide any **additional free business educational workshops** to Winter Park businesses.

Lastly, under this Partnership, the NEC would need access to classroom/training room/meeting space to workshops and in-person business coaching sessions. We would work with you on determining the dates/times/location for the workshops. Ideally these would be pre-programmed to maximize coordinated marketing efforts. Furthermore, although the NEC has a very strong social media presence, any additional communication methods available through the city to market activities would be appreciated.

NEC Resident Resource Partners:



NEC Investors: *We look forward to adding the City of Winter Park to our wall of investors!*



item type	Non-Action Items	meeting date	August 8, 2023
prepared by	Kyle Dudgeon	approved by	
board approval			
strategic objective			

subject

EDAB Retail Strategies Report - Commission Feedback

motion / recommendation

N/A

background

Staff will provide an update on Commission feedback related to the Retail Strategies report given on July 26th. Meeting minutes, video, and agenda can be found on the city's website.

alternatives / other considerations

fiscal impact

ATTACHMENTS:

[Winter Park Retail Strategies Report_June 2023_Final Draft v3.pdf](#)

ATTACHMENTS:

[WinterParkRetailVisionOnePagerFinalv1.pdf](#)

ATTACHMENTS:

[Economic_Development_Subcommittee_Statement__Guiding_Principles_DRAFT_V1.1.pdf](#)



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 | JUNE 2023

ACKNOWLEDGMENTS

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

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This document has been prepared by MJB Consulting and GAI Consultants, Inc. on behalf of the City of Winter Park, Florida.



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 following¹:

- 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.

¹The 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

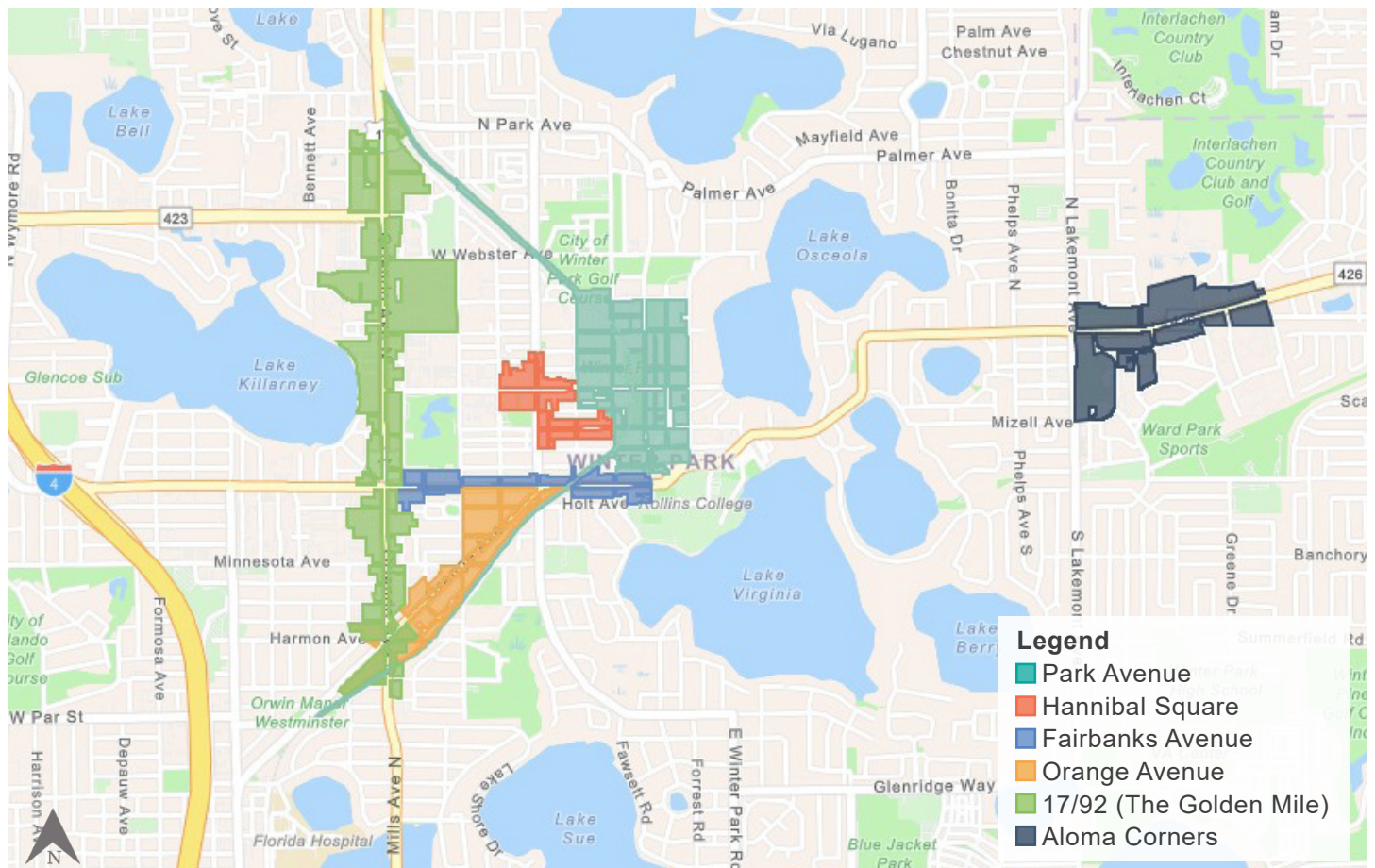
3+ years (long-term), as based on the need for adjustments or deeper dives, the process for securing buy-in as well as the practicalities of capacity, timing and priority.

- 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



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

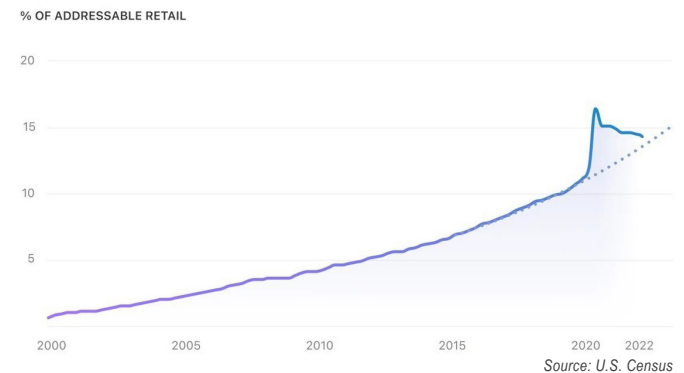
The realization that flexibility—in policy, zoning, approvals, and permitting—will be essential to keeping Winter Park relevant and differentiated in a rapidly-evolving and fiercely-competitive industry.

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.

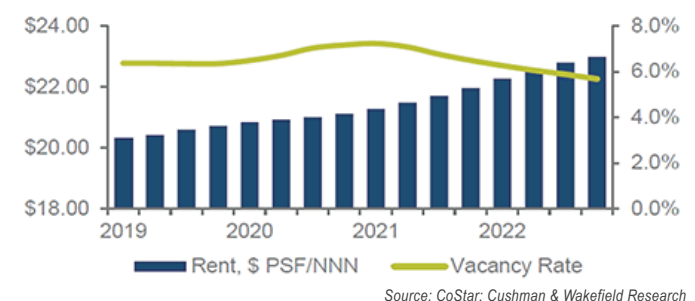
DEFINITION: “Retail” for the purposes of this scope-of-work has been defined broadly, to include any ground-floor uses that are consumer-facing—that is, welcoming potential customers either on a walk-in or subscription basis. This would encompass, then, personal services, food and beverage as well as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

US Ecommerce Adoption Growth Rate



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



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.

IMPLEMENTATION MATRIX

Area – Bucket	Specific Action Item(s)	Time Horizon
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)
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)
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)

Chief Sponsor(s)	Context/Commentary
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.
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.
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
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)
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)
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)

Chief Sponsor(s)	Context/Commentary
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.
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.
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
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)
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)
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)

Chief Sponsor(s)	Context/Commentary
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).
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.
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
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)
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)

Chief Sponsor(s)	Context/Commentary
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.
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.

Prepared By:



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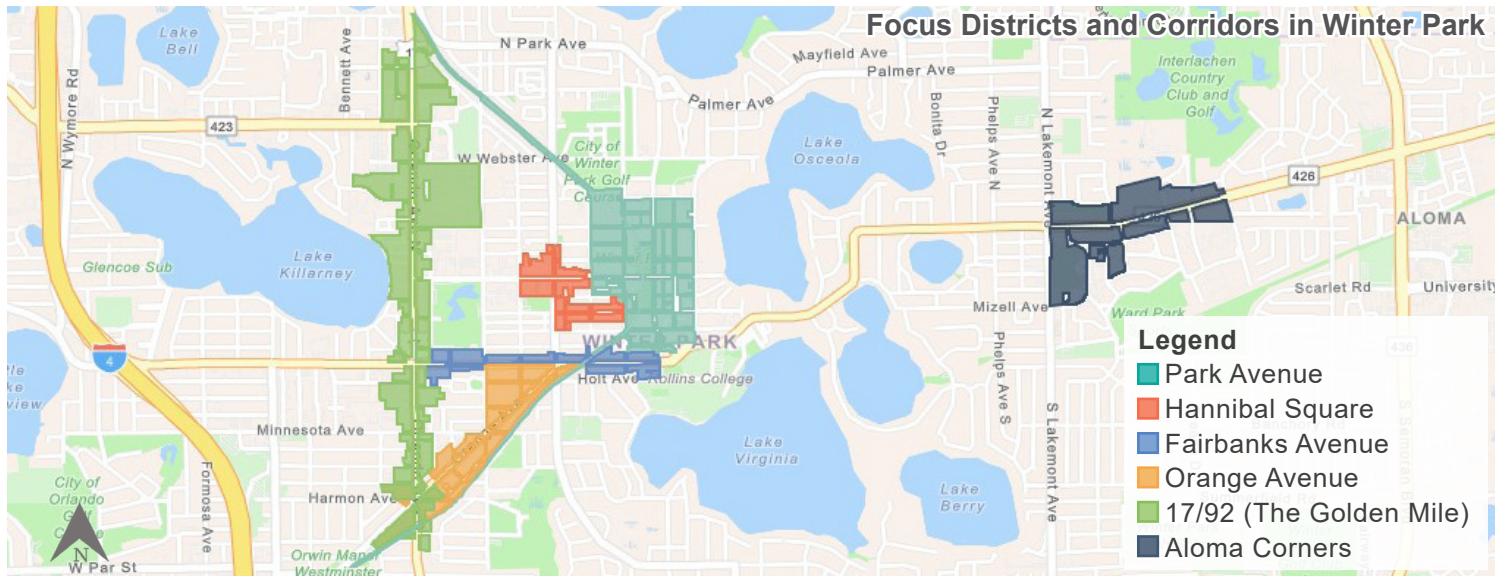


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WINTER PARK RETAIL VISION

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



HANNIBAL SQUARE

Current Positioning

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

Potential

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



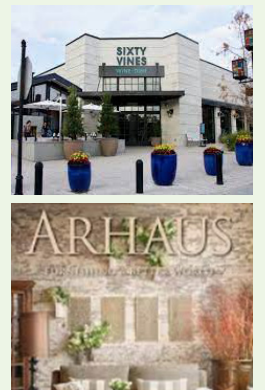
17/92 (THE GOLDEN MILE)

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



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

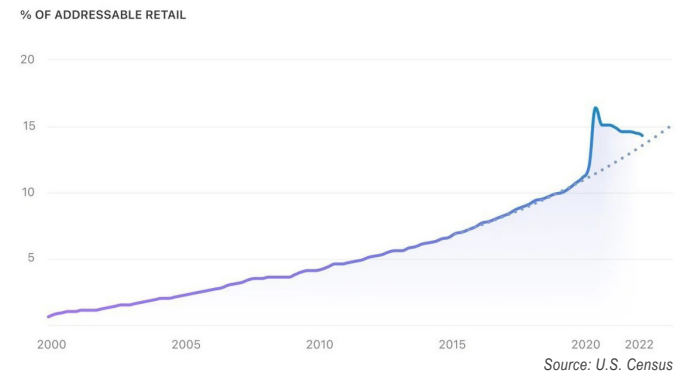
The realization that flexibility—in policy, zoning, approvals, and permitting—will be essential to keeping Winter Park relevant and differentiated in a rapidly-evolving and fiercely-competitive industry.

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.

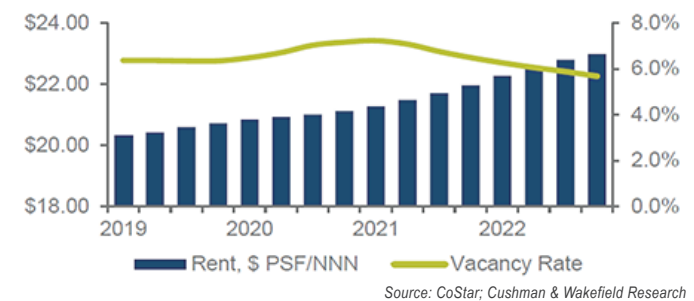
DEFINITION: “Retail” for the purposes of this scope-of-work has been defined broadly, to include any ground-floor uses that are consumer-facing—that is, welcoming potential customers either on a walk-in or subscription basis. This would encompass, then, personal services, food and beverage as well as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

US Ecommerce Adoption Growth Rate



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



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.





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 hireable, 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.

item type	Staff Updates	meeting date	August 8, 2023
prepared by	Kyle Dudgeon	approved by	
board approval			
strategic objective			

subject

EDAB Commercial Performance Report

motion / recommendation

N/A

background

Monthly reports as requested

alternatives / other considerations**fiscal impact****ATTACHMENTS:**

[Park Avenue.Hannibal ped counters July 2023.pdf](#)

ATTACHMENTS:

[EDAB Commercial Performance Report.August 2023.pdf](#)

City of Winter Park

Kyle Dudgeon
08/02/2023



Key Figures

July 1, 2023 → July 31, 2023

Total

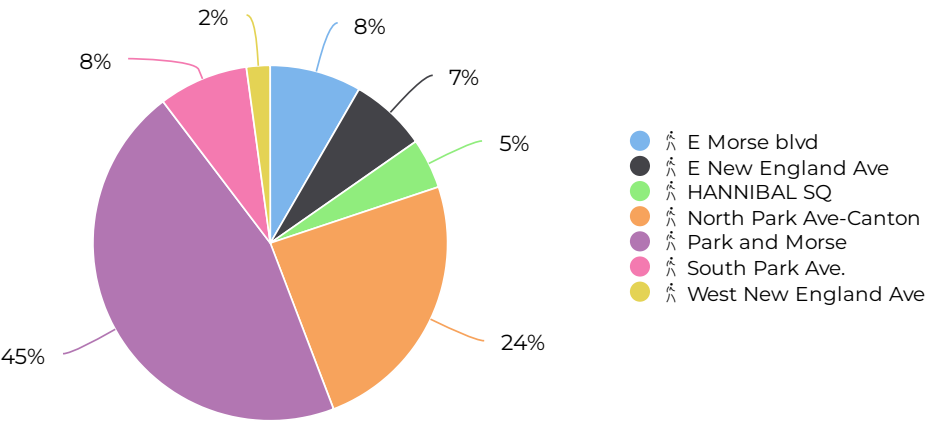
187,231

Peak Day

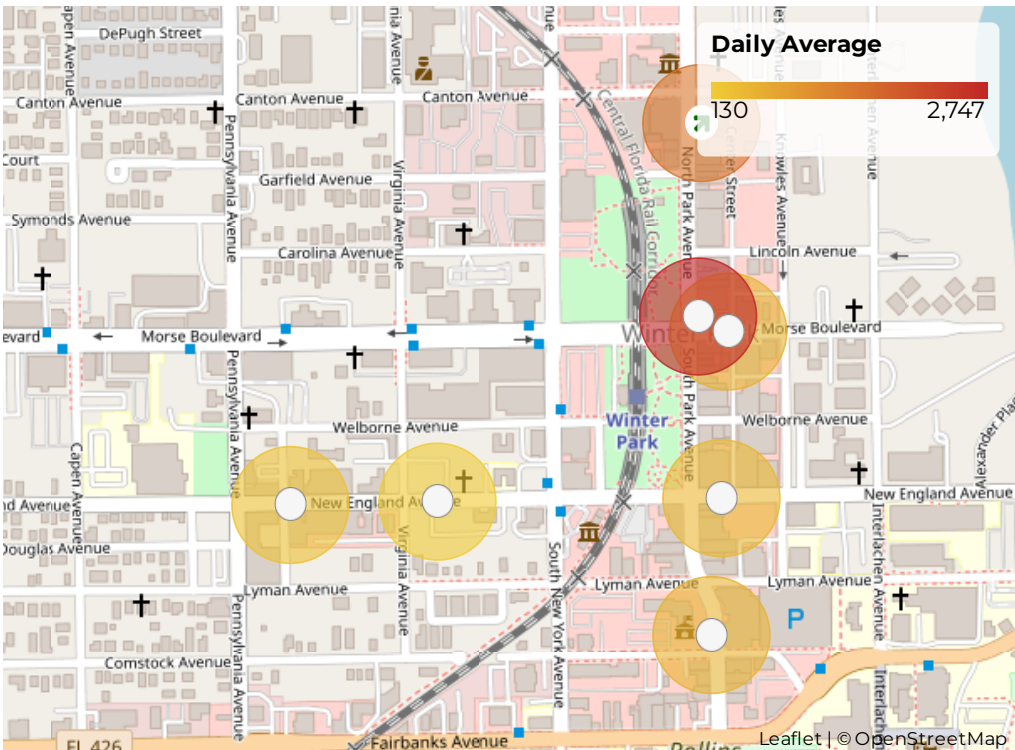
Saturday
Jul 8, 2023

10,671

Distribution



Key Figures Map

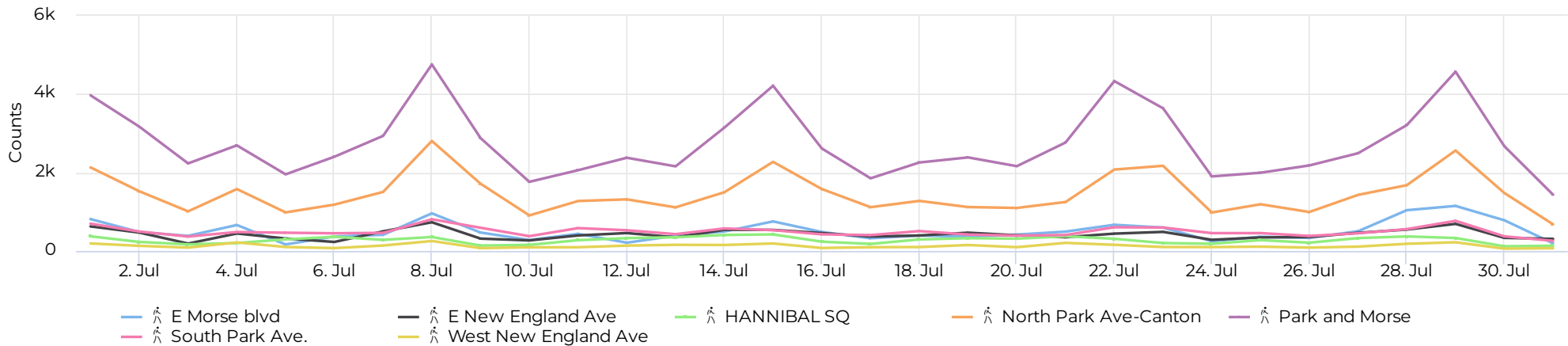


Compared to 07/02/2022 → 08/01/2022

Key Figures

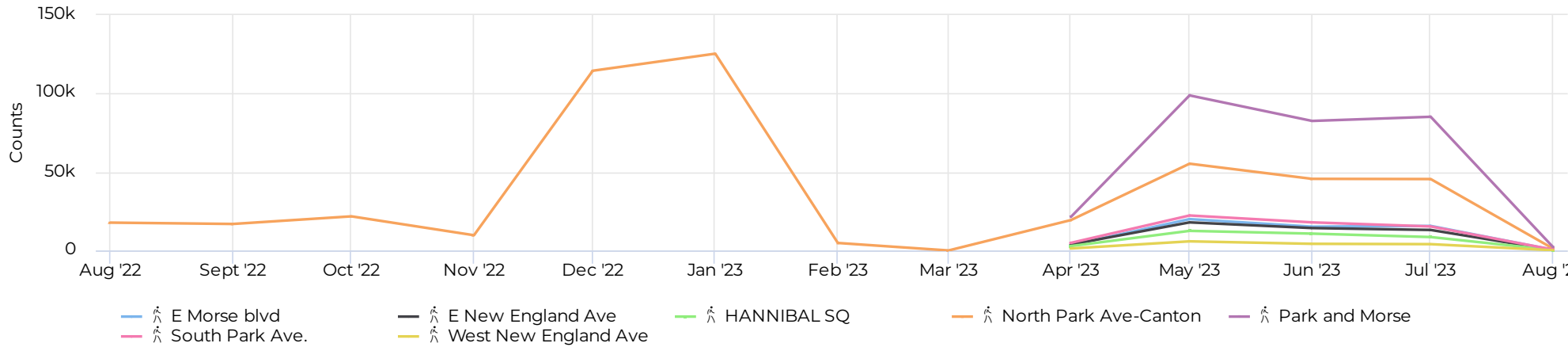
July 1, 2023 → July 31, 2023

Daily traffic



Monthly traffic

08/02/2022 → 08/01/2023

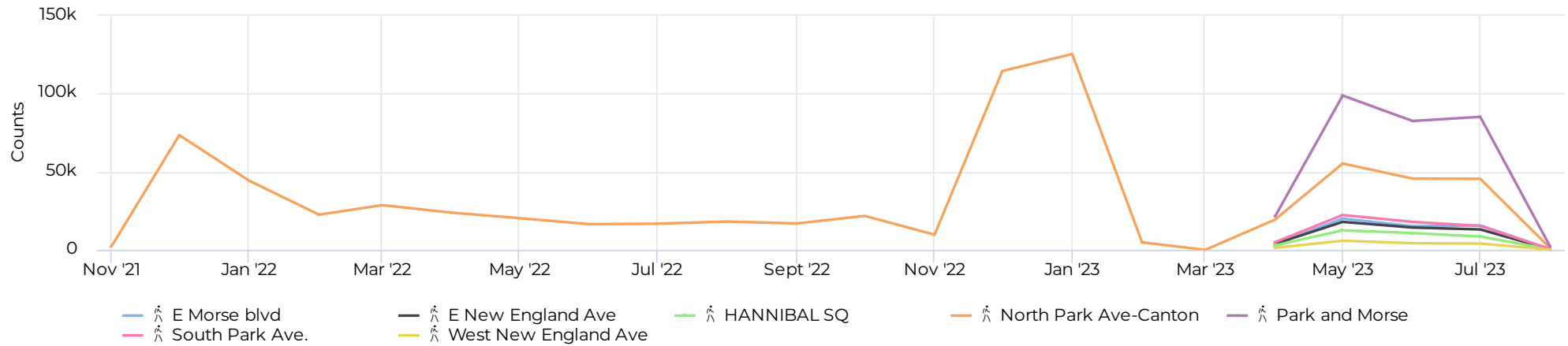


Key Figures

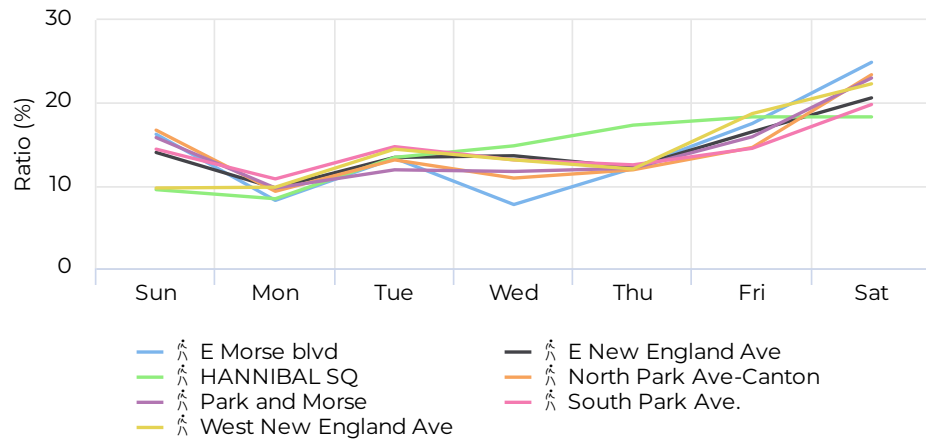
July 1, 2023 → July 31, 2023

Monthly traffic

📅 Whole Period

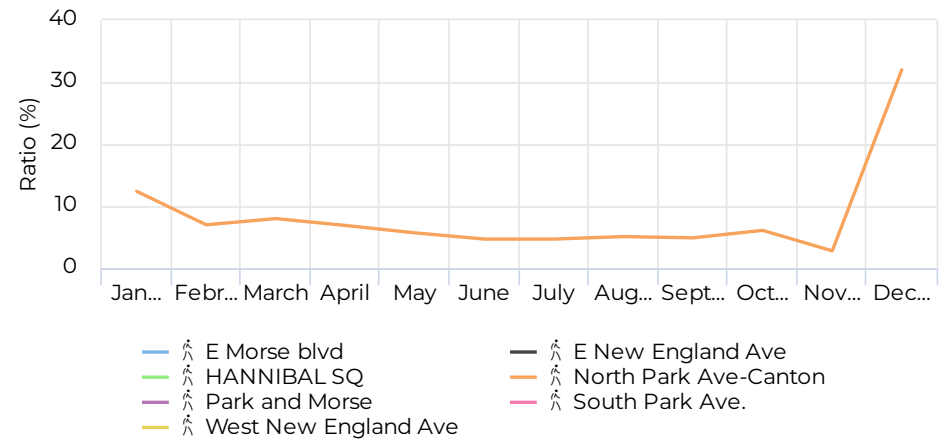


Daily Profile



Monthly Profile

📅 01/01/2022 → 12/31/2022

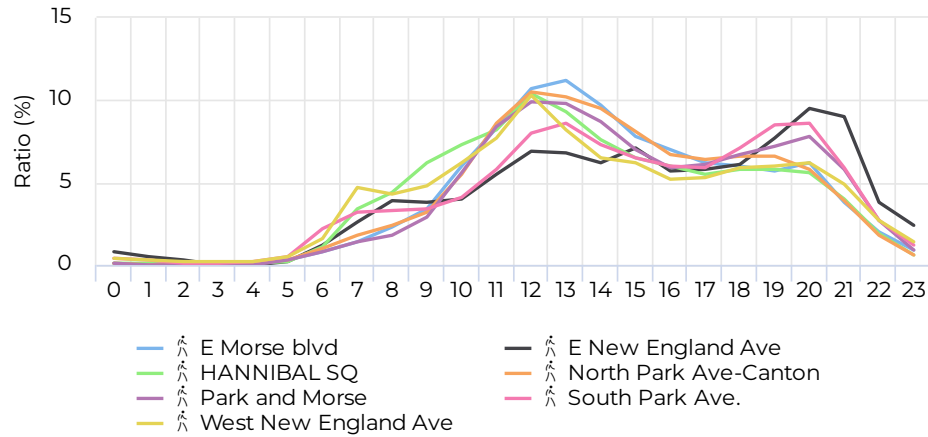


Key Figures

July 1, 2023 → July 31, 2023

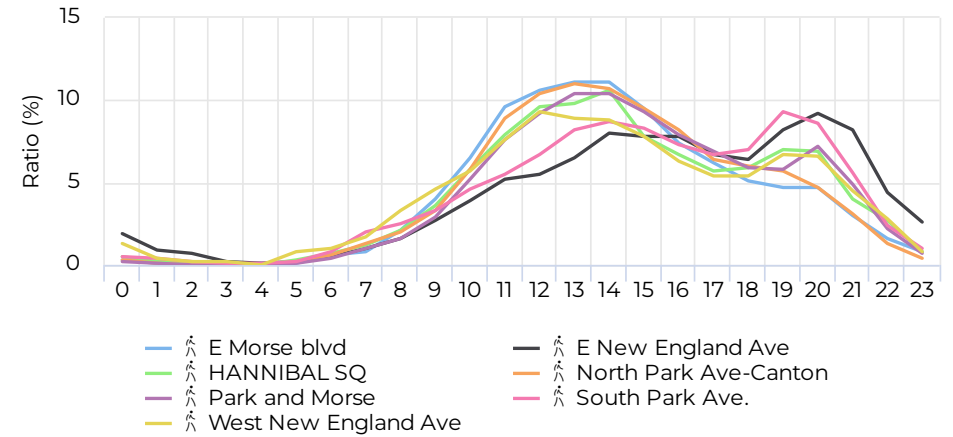
Hourly Profile - Weekdays

01/01/2023 → 08/01/2023



Hourly Profile - Weekend

01/01/2023 → 08/01/2023



Key Figures

July 1, 2023 → July 31, 2023

Key Figures Summary

Site	Daily Average ▼		Peak Day		Peak Count	
Park and Morse	2,747		Sat Jul 8, 2023		4,756	
North Park Ave-Canton	1,468	▲ 177.4%	Sat Jul 8, 2023	Thu Jul 28, 2022	2,806	▲ 220.0%
E Morse blvd	505		Sat Jul 29, 2023		1,149	
South Park Ave.	494		Sat Jul 8, 2023		808	
E New England Ave	421		Sat Jul 8, 2023		732	
HANNIBAL SQ	276		Sat Jul 15, 2023		422	
West New England Ave	130		Sat Jul 8, 2023		254	

📈 Compared to 07/02/2022 → 08/01/2022

Commercial Performance Report

8/23

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

Sources: ESRI, CoStar, BLS

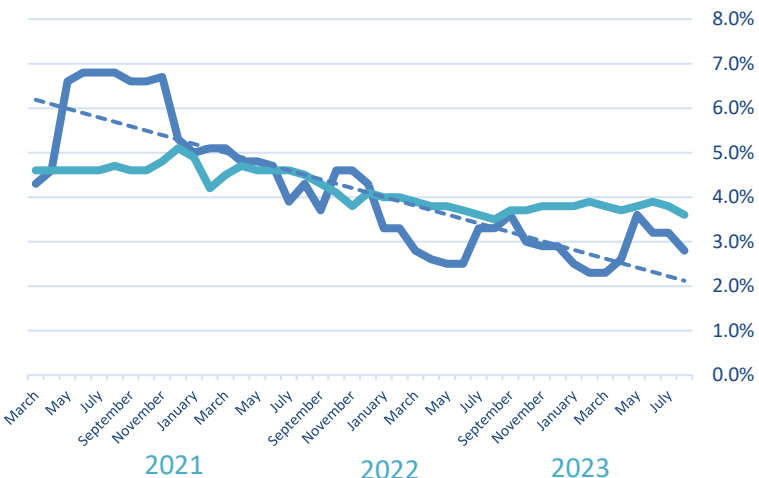
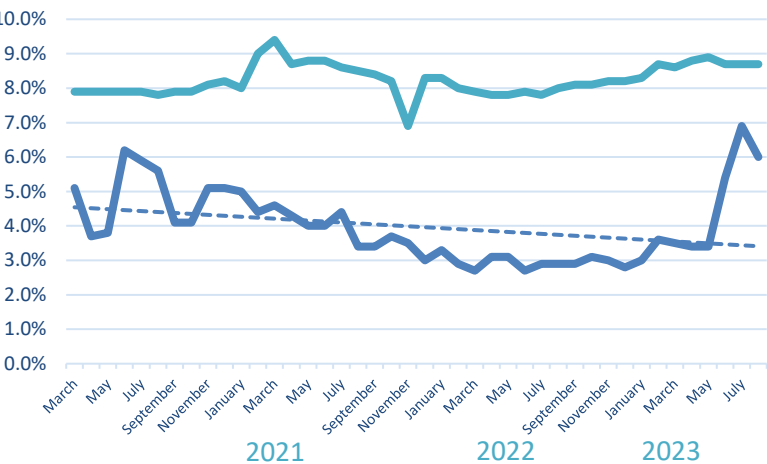
OFFICE

Vacancy

RETAIL

Winter Park Orlando MSA

Winter Park Orlando MSA



Rental Rate

Winter Park Orlando MSA

Winter Park Orlando MSA

