

Town of Palm Beach Project for Code Reform Project Brief and Proposed Work Plan

Final Draft date: August 28, 2019

The Town of Palm Beach seeks to reform its conventional zoning code. In addition to being based on outdated auto-centric land use patterns, the current code is also unmanageable due to extensive, contradicting standards and special district conditions added over the past several decades.

Most existing zoning codes, including that of Palm Beach, were written to guide the post-war housing boom. While these codes were able to accommodate unprecedented growth, many had unintentional consequences that hampered the ability to develop more of the walkable, vibrant streets and neighborhoods that were the historic hearts of many villages and cities. In Palm Beach, it is illegal in the Town's zoning code to build a replica of a beloved building or neighborhood of Historic Palm Beach. Furthermore, the process of updating a code can be expensive and time consuming, requiring significant municipal capacity.

In 2016, the Congress for the New Urbanism (CNU -- CNU is a nonprofit 501(c)(3) organization headquartered in Washington, DC) launched the Project for Code Reform to streamline the code reform process by providing local governments with place-specific incremental coding changes that address the most problematic barriers first, build political will, and ultimately create more walkable, prosperous, and equitable places. While the reform strategies developed through the project have been met with widespread support, an opportunity to fully demonstrate the systemic implementation of incremental reform would provide key learnings for the project and illustrate a front-to-back strategy that other communities could model.

As a result, CNU now seeks to leverage the Project for Code Reform by partnering with the Town of Palm Beach, as a case study for analyzing the full extent of regulations that can inhibit the placemaking, historic preservation, and historic form promotion strategies that have a demonstrated track record of increasing financial performance, preserving and revitalizing historic commercial corridors, protecting the environment, and helping to create more equitable communities. As a byproduct of this research, CNU will then empower expert code-writing members to draft an orderly, incremental but comprehensive code reform process based on current research, best practice, and community context, delivered with significant public education and engagement. The outcome will be a radically simplified town-wide zoning code, easily understood and fully integrated across all land use regulations.

CNU is proposing a five-step process for implementing this project, which will be implemented through six categories of research. The five-step process includes:

- Analysis of existing code elements across all land use regulations,
- Research into existing federal and state regulations that impact local development,
- A half-day symposium led by national experts on critical coding considerations and town building principles,
- A half day public engagement exercise following each symposium, and

- Provision of recommended code changes (or language for new land use regulations) that incorporates all of the above.

The six categories of land use regulatory research through which this process will be delivered include:

- The History, Theory and Practice of Land Use Codes
 - Speaker 1: (Leading Expert in Urban Design)
 - Speaker 2: (Leading Academic in Planning History)
- Place, Form, and Space in the Town of Palm Beach
 - Speaker 1: (Leading Expert in Code Writing)
 - Speaker 2: (Leading Expert in Architecture)
- Vulnerability Analysis and Design & Regulation for Resiliency
 - Speaker 1: (Leading Expert in Sustainability)
 - Speaker 2: (Leading Expert in Resiliency)
 - Speaker 3: (Leading Expert in Climate-Responsive Design)
- Historic Preservation and Landscapes, Landmarking, and Protection Best Practices
 - Speaker 1: (Leading Expert in Historic Preservation)
 - Speaker 2: (Leading Expert in Landscape Design)
- Complete Streets, Retail Trends, and Parking Resource Management
 - Speaker 1: (Leading Expert in Retail)
 - Speaker 2: (Leading Expert in Transportation)
- The Power of Good Design in Coding Urban Outcomes
 - Speaker 1: (Leading Expert in Urban Design)
 - Speaker 2: (Leading Expert in Public Health)
 - Speaker 3: (Leading Expert in Architectural Design)

Through these six categories of research, all major factors mitigating the built outcomes of the Palm Beach zoning code will be researched and analyzed, and specific coding recommendations will be developed. At the completion of the process, these coding recommendations will be compiled into a completely reformed zoning code for the Town.

A town-wide incremental zoning overhaul this systemic has never been done in the U.S. By breaking the process and the analysis into incremental phases, and educating the public on the essential elements of land use regulations and state requirements, CNU believes the result will deliver a code reform process that is replicable in other cities and towns in the U.S. A partnership between CNU and the Town of Palm Beach will not only provide the Town with a newly reformed code, it will also provide CNU with insights on the incremental code reform process: what works, what doesn't, and how it can be replicated in other places.

PROPOSED WORKPLAN

Task 1 - Kickoff & Research: *Identify the Needs for Code Reform in Palm Beach*

In order to fully understand the breadth and depth of the code reform needs in the Town of Palm Beach, a formal project launch and thorough background of research is necessary. CNU will lead a Kickoff meeting with Town elected officials, staff, and stakeholder group representatives to launch the project, explain the incremental code reform process, and solicit feedback and facilitate a dialogue on the common zoning obstacles. Additionally, CNU will conduct an analysis of the land use regulations across the 6 identified categories of research that are contributing to the challenges of placemaking in the Town of Palm Beach, identified the major obstacles to be addressed through the code reform process.

Strategy: Kickoff Meeting and Research Papers on Land Use Regulatory Themes

Objective: Analyze existing regulatory obstacles to best practice placemaking strategies across 6 identified categories of research

Primary Team Members: CNU (Mallory Baches, Avery Kelly), Researcher (Bruce Donelley)

Secondary Team Members: CNU (Lynn Richards), Code Experts (Matt Lambert, Marina Khoury)

Sub-tasks:

- Kick-off meeting with Town of Palm Beach and Project Team to cement scope, confirm approach, and engage local departmental partners in process of project
- Research of relevant local, state, and federal regulations on land use
- Distillation of research into major placemaking-inhibiting obstacles
- Delivery of research in an easy to read, annotated document suitable for publication

Deliverables:

- 6 @ 3-5 page reports on each of the identified categories of research
- Preparation work associated with each research paper
- Design/layout work associated with each research paper

Task 2 - Symposium Series: *Link Code Reform to Stakeholder Interests and Address Community Concerns*

In order to engage and ground the Palm Beach community in the need for, implications of, and considerations associated with the incremental code reform process, CNU will facilitate individual symposia focused on the six (6) identified categories of land use regulation research. To deliver this public education, CNU will leverage the expertise of nationally-recognized experts in fields critically associated with zoning, including: architecture, urban design, planning, historic preservation, landscape, sustainability, resiliency, transportation, commercial development, housing, and public health. Additionally, CNU will facilitate community listening sessions in conjunction with each symposium, to gauge concerns and solicit feedback on the subject.

Strategy: Organization and Execution of Symposium Series

Objective: In incremental phases, provide public educational grounding, fostered by national industry experts speaking on the primary land use regulatory themes impacting the Town of Palm Beach

Primary Team Members: CNU (Mallory Baches, Tracy Cooper)

Secondary Team Members: CNU (Lynn Richards), Code Experts (Matt Lambert, Marina Khoury)

Sub-tasks:

- Coordinate with speakers on preparation for presentations
- Collaborate with Town of Palm Beach on outreach for series
- Record and publish presentations online
- Facilitate public listening sessions following each presentation
- Record and document community feedback

Deliverables:

- 6 @ 2-day site visits for symposium series
- Preparation work associated with each site visit
- Documentation/publication work associated with each site visit

| Symposium Series Schedule | | | |
|---------------------------|--|---|---|
| January 23 | Symposium 1: History of Codes/Code Theory/Zoning Codes Best Practices | Leading Expert in Urban Design / Leading Academic in Planning History Lynn Richards Mallory Baches Marina Khoury | Organizational Approach, Short Term vs Long Term Fixes, Vision for Code |
| February 6 | Symposium 2: Place Types, Form, Height/Scale/Mass, Landscape, Open Space | Leading Expert in Code Writing / Leading Expert in Architecture Mallory Baches Marina Khoury | Architectural Standards, Height Districts, Frontage Types, Composition Adjacency Requirements, Transition Principles, Use/Form |
| February 20 | Symposium 3: Vulnerability Analysis, FEMA Regulation, Local Regulations, Disaster Regulations, Design | Leading Expert in Sustainability / Leading Expert in Resiliency / Leading Expert in Climate-Responsive Design Mallory Baches Marina Khoury | FEMA Design Strategies, Sustainability Strategies, Stormwater Strategies |
| March 5 | Symposium 4: Historic Preservation and | Leading Expert in Historic Preservation / Leading Expert in | Historic Preservation Strategies, Demolition, Revisions to Landmarking, |

| | | | |
|----------|--|--|--|
| | Landscapes (Historic Districts, Landmarking, Native Landscape, Best Practices) | Landscape Design Mallory Baches Marina Khoury | Evaluation of Historic Districts, Grade/Category (1/2/3), Native Vegetation and Landscapes |
| March 19 | Symposium 5: Retail + Parking + Transportation (Complete Streets) | Leading Expert in Retail / Leading Expert in Transportation Mallory Baches Marina Khoury | Retail Strategy (Main Street District), Parking Standards and Management Strategy, Transportation and Streetscape Network |
| April 2 | Symposium 6: Inclusive Mobility/Public Health/the Power of Good Design | Leading Expert in Urban Design / Leading Expert in Public Health / Leading Expert in Architectural Design Lynn Richards Mallory Baches Marina Khoury | Urban Standards, Lot Coverage, Frontage Buildout, Additional Requirements and Guidelines, Sign Standards |

Task 3 - Workshop: *Determine Place Types, Map the Municipality, and Draft Code Reform Framework*

CNU will lead a five day workshop, where the team will work directly with Town staff to learn about the most prevalent planning and zoning obstacles to livable, walkable placemaking specific to the needs and concerns of the Town of Palm Beach. The team will determine the place types and context zones present in Palm Beach, map the municipality based on these place types and context zones, and develop protection and/or enhancement goals for each. The outcome of the workshop will be a Code Reform Framework, which the team will use as a tool when compiling the specific replacement code elements for each place type in Palm Beach, based on the six (6) identified categories of land use regulation.

Strategy: Incremental Coding Workshop

Objective: Utilizing background research on existing regulations, Determine Place Types and Map Municipality in order to draft corresponding Code Reform Framework, outlining the structure for delivering replacement code elements based on land use regulatory themes

Primary Team Members: CNU (Lynn Richards, Mallory Baches), Code Experts (Matt Lambert, Marina Khoury), Renderer (DPZ CoDesign)

Sub-tasks:

- Determination of place types
- Mapping of districts
- Building of code reform framework
- Preliminary structuring of replacement code elements
- Illustrating of common existing code conditions, as needed

Deliverables:

- 1 @ 1-week workshop to analyze existing code and propose conceptual recommendations
- Preparation work associated with planning workshop
- Draft framework for revised code elements
- Illustrations associated with code conditions

Background Base Mapping needed from Town of Palm Beach:

- Existing Building Types/Lot Types/District Types documentation
- Synoptic Survey results

Task 4 - Code Elements Framework: *Deliver, Review, and Adopt Replacement Code Elements*

Utilizing the Code Reform Framework created during the five day workshop, the team will develop specific incremental land use regulation changes for each place type within the Town of Palm Beach. The resulting place-specific strategies will identify the incremental reform that Palm Beach should implement in each of the critical coding areas. CNU will facilitate the delivery of these replacement code elements, in incremental phases based on the six (6) identified categories of land use regulation and in conjunction with each of the six (6) symposia, to the Town of Palm Beach for review and adoption.

Strategy: Code Element Drafting, Listening Sessions and Review, Code Element Refinement, and Incremental Adoption

Objective: Deliver replacement code elements with precise code text and corresponding diagrams, inserted into draft code reform framework incrementally with the subject matter and phasing of 6 symposiums, to be reviewed to ensure they respond to the zoning reform challenges facing the Town of Palm Beach and are easily implemented, in preparation for refinement and incremental adoption

Primary Team Members: Code Experts (Matt Lambert, Marina Khoury)

Secondary Team Members: CNU (Lynn Richards, Mallory Baches)

Sub-tasks:

- For each land use regulatory theme, draft recommended replacement code elements and insert into code reform framework
 - Incorporate review/ground truthing by Town of Palm Beach and stakeholders
 - Incorporate community feedback based on listening sessions
- Refine recommended code elements as necessary
- Publish recommended code elements
- Facilitate adoption of recommended code elements

Deliverables:

- 6 @ reviewed individual land use regulatory-thematic sets of recommended code elements

Task 5 - Code Documents Creation: *Layout Document Structure and Design Individual Code Deliverables*

CNU will design and layout an overall document structure, within which to embed each of the 6 sets of specific incremental land use regulation changes for each place type developed by the team as well as any related guidance materials necessary. The layout will be designed with the goal of creating a user-friendly document that breaks down complicated information so that it is easily understood and more accessible to non-planning professionals, as well as easily applied and administered by the Town of Palm Beach staff.

Strategy: Create a Comprehensive Community Code Document

Objective: Provide a simple organizing structure and incrementally embed strong, easy-to-understand code deliverables, as will be essential for the Town of Palm Beach to use the complete document and adopt the individual sets of recommendations embedded within

Primary Team Members: CNU (Mallory Baches), Renderer (DPZ CoDesign), document designer

Secondary Team Members: Code Experts (Matt Lambert, Marina Khoury)

Sub-tasks:

- Acquire images from Team and Town of Palm Beach, as needed
- Develop iconography/graphics/diagrams necessary for clearly conveying individual sets of replacement code elements
- Layout of document structure
- Embedding of replacement code elements
- Illustrating of common replacement code conditions, as needed
- Draft review of each set of code deliverables by Town of Palm Beach
- Finalization of each set of code deliverables

Deliverables:

- 6 @ fully formatted draft/final code documents for review by Town of Palm Beach

Task 6 - Final Report and Analysis: *Draft Summary Report of Incremental Code Reform Process and Final Coding Results*

CNU will lead a review workshop with the team, in order to analyze the project and provide a final reporting document that summarizes the research and specific incremental code reform of the 6 identified categories of land use regulation and for each Palm Beach place type, based on the learnings from the 5-day workshop, the review of the replacement code elements, and the feedback from the community listening sessions. The layout will be designed to provide an easy-to-read document that fully summarizes the code reform process and products delivered to the Town of Palm Beach. CNU will then work with the Town to facilitate outreach and communication of the final report to the audiences of both CNU nationally and the Town of Palm Beach locally.

Strategy: Review Workshop to Compile Research and Replacement Code Elements into Final Findings Report

Objective: Compile the research and product developed through the Incremental Code Reform Process and Model Comprehensive Community Code delivered to the Town of Palm Beach through this project into a final findings report suitable for publication and distribution

Primary Team Members: CNU (Lynn Richards, Mallory Baches, Lisa Schamess), document designer

Secondary Team Members: Code Experts (Matt Lambert, Marina Khoury)

Sub-tasks:

- Compile and analyze the process and products derived from the project
- Summarize and provide analysis of code elements delivered to Palm Beach
- Design and layout of report
- Outreach and communication of final report

Deliverables:

- 1 @ 1-week workshop to compile and synthesize research and findings, analyze code documents, and draft final report framework
- Preparation work associated with planning workshop
- 1 @ fully formatted final report documenting process/product
- Preparation work associated with final report
- Design/layout work associated with final report

Task 7 - Conclusion: *Draft Findings Document of Incremental Code Reform Implementation*

CNU will develop a findings document that synthesizes the process and products developed for the Town of Palm Beach project, to determine lessons learned and identify areas for further research relevant to the implementation of a complete incremental code reform process. CNU will work with the Town to review the project and identify examples of best practices and opportunities for improvement, and will compile strategies for systematizing response to both. CNU will then draft a reference manual for communities to refer to when implementing their own Incremental Code Reform process.

Strategy: Create an Incremental Code Reform Manual

Objective: Synthesize the outcomes developed through CNU's facilitation of a complete Incremental Code Reform Process into a findings document illustrating how other cities can replicate the process implemented in the Town of Palm Beach.

Primary Team Members: CNU (Lynn Richards, Mallory Baches, Lisa Schamess), document designer

Sub-tasks:

- Synthesize the complete research content executed through the project
- Design and layout of guide
- Outreach and communication of guide

Deliverables:

- 1 @ fully formatted findings document for broader audience
- Preparation work associated with findings document
- Design/layout work associated with findings document

PROPOSED TEAM

Research Team:

- Lynn Richards, CNU (face of project)
- Mallory Baches, CNU (PM)
- Support staff
 - Bruce Donnelly, Access Places (researcher)
 - Avery Kelly, CNU (research assistant)
 - Tracy Cooper, CNU (logistics coordinator)
 - Lisa Schamess, CNU (communications)

Coding Team:

- Marina Khoury, DPZ CoDesign
- Matt Lambert, DPZ CoDesign
- Renderer: DPZ CoDesign
- Document designer: TBD

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PROPOSED PROJECT TIMELINE

| January 2020 | | | |
|---------------|---|--|---|
| January 6 | Kickoff Meeting | Project Team: Marina Khoury, Matt Lambert, Mallory Baches, Lynn Richards | |
| January 6-10 | Incremental Coding Workshop: Analysis/Mapping/Base Materials | Project Team: Marina Khoury, Matt Lambert, Mallory Baches, Lynn Richards (Public Engagement) | Synoptic Survey, Place Types, Context Zones, Open Space, Lot Type, Building Types |
| January 16 | Symposium 1 research prep deadline | | |
| January 23 | Symposium 1: History of Codes/Code Theory/Zoning Codes Best Practices | Lizz Plater-Zyberk/Emily Talen Lynn Richards Mallory Baches Marina Khoury | |
| January 24 | Community Feedback Listening Session | Mallory Baches Marina Khoury | |
| January 30 | Symposium 1 code recommendations deadline | | |
| | Symposium 2 research prep deadline | | |
| February 2020 | | | |
| February 6 | Symposium 2: Placetypes, Form, Height/Scale/Mass, Landscape, Open Space | Victor Dover/Richard Sammons/Anne Fairfax Mallory Baches Marina Khoury | History of Palm Beach, Mapping/Synoptic Survey, Transitions, Adjacency Requirements |
| February 7 | Community Feedback Listening Session | Mallory Baches Marina Khoury | |
| February 13 | Symposium 2 code recommendations deadline | | |
| | Symposium 3 research | | |

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|-------------------|---|---|--|
| | prep deadline | | |
| February 20 | Symposium 3: Vulnerability Analysis, FEMA Regulation, Local Regulations, Disaster Regulations, Design | Bill McDonough, Kurt Bosma, FEMA Captain, FEMA+Design architect (female - new orleans, sandy, charleston) Mallory Baches Marina Khoury | (ex: elevate historic structure, new infill) |
| February 21 | Community Feedback Listening Session | Mallory Baches Marina Khoury | |
| February 27 | Symposium 3 code recommendations deadline | | |
| | Symposium 4 research prep deadline | | |
| March 2020 | | | |
| March 5 | Symposium 4: Historic Preservation and Landscapes (Historic Districts, Landmarking, Best Practices) | Ruth Todd / Landscape Designer Mallory Baches Marina Khoury | |
| March 6 | Community Feedback Listening Session | Mallory Baches Marina Khoury | |
| March 12 | Symposium 4 code recommendations deadline | | |
| | Symposium 5 research prep deadline | | |
| March 19 | Symposium 5: Retail + Parking + Transportation (Complete Streets) | Adam Decker (RCLCO)/Jeff Tumlin Mallory Baches Marina Khoury | |
| March 20 | Community Feedback Listening Session | Mallory Baches Marina Khoury | |
| March 26 | Symposium 5 code recommendations deadline | | |
| | Symposium 6 research prep deadline | | |

| April 2020 | | | |
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| April 2 | Symposium 6: Inclusive Mobility/Public Health/the Power of Good Design | Andres Duany/Dick Jackson/Deborah Berke Lynn Richards Mallory Baches Marina Khoury | |
| April 3 | Community Feedback Listening Session | Mallory Baches Marina Khoury | |
| April 9 | Symposium 6 code recommendations deadline | | |
| April 20-24 | Completion Workshop: Compilation of Research Papers into Final Recommendation Report | Project Team: Marina Khoury, Matt Lambert, Mallory Baches, Lynn Richards (Public Engagement) | |
| May 2020 | | | |
| May 14 | Draft document delivered | | |
| May 28 | Comments received from Town of Palm Beach | | |
| June 2020 | | | |
| June 5 | Final Draft document delivered | | |