

RESOLUTION NO. 11-171

A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF KEY WEST, FLORIDA, ACCEPTING THE ATTACHED REPORT ON RECOMMENDATIONS OF THE STRATEGIC PLANNING COMMITTEE; DIRECTING THE CITY MANAGER TO PRESENT A QUARTERLY REPORT ON PROGRESS OF THE CITY'S STRATEGIC PLAN; PROVIDING FOR AN EFFECTIVE DATE

WHEREAS, in Resolution No. 10-036, the City Commission established a Strategic Planning Committee to develop a clearly defined strategic plan for the benefit of the entire Key West community for consideration by the Key West City Commission; and

NOW THEREFORE, BE IT RESOLVED BY THE CITY COMMISSION OF THE CITY OF KEY WEST, FLORIDA, AS FOLLOWS:

Section 1: That the attached report of the Strategic Planning Committee is here by accepted.

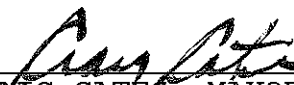
Section 2: That the City Manager is directed to prepare a quarterly report on the progress of implementing the recommendations included in the Strategic Plan.

Section 3: That this Resolution shall go into effect immediately upon its passage and adoption and authentication by the signature of the presiding officer and the Clerk of the Commission.

Passed and adopted by the City Commission at a meeting held
this 7th day of June, 2011.

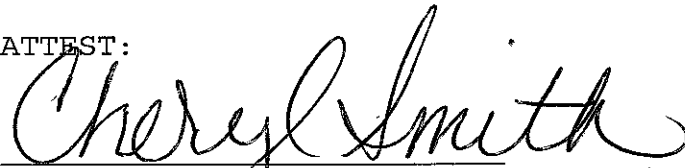
Authenticated by the presiding officer and Clerk of the
Commission on June 8, 2011.

Filed with the Clerk June 8, 2011.



CRAIG CATES, MAYOR

ATTEST:



CHERYL SMITH, CITY CLERK



2011 Strategic Plan

City of Key West, Florida

May, 2011

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This Plan is respectfully submitted by:

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ACKNOWLEDGEMENT

We would like to acknowledge and thank all those individuals who took the time to contribute their thoughts and ideas to the development of this Strategic Plan.

EXECUTIVE SUMMARY

The Key West City Commission initiated the development of the 2011 Strategic Plan in recognition of both a changing Key West and a desire to shape a broad vision for the future. This is intended as a five-year plan with a ten-year or longer perspective. The mayor expressed a deep concern that we maintain our identity as a community as we find a balance with the things that visitors and residents want. In seeking this balance, commissioners felt that we needed “an overarching vision or philosophy of what type of community we want to become,” or as another said, paying close attention to “what the community wants” and in the long-term, as another commissioner expressed, to “reinvent our image”. Clearly the intent was to focus on fundamental values that the entire community—government, business, nonprofits, individuals— would strive to achieve.

The Strategic Planning Committee held an organizing meeting in April of 2010 and over the summer heard from various city officials and others who contributed background information and perspectives important to our task. While reviewing demographic and economic data on how Key West has changed in the first decade of the 21st century, the committee also began a review of a number of surveys and studies of what Key West residents have said about their core values, as well as what visitors have indicated are important to them. These studies reflected important trends affecting the city. A review of strategic plans done by other small cities in the U.S. and a review of studies from outside the Key West borders afforded a look at ourselves through the experience of others.

An outline of the Strategic Plan that we would offer gradually emerged, organized into six domains: Economy, Environment, Culture, Infrastructure, Government and Quality of Life. The development of goals, objectives, initiatives, and indicators of progress within each domain then became the primary focus of our work. As we were working through these sections of the plan, the detail involved seemed to the Committee and may well seem to the reader rather arduous and at times exceedingly fine-grained. But the cumulative effect, the Committee believes, paints a picture of a community that is supported by those things that both residents and visitors value, as well as a “to-do” list of things that must be done to enhance our community and economy over the long term.

In the end, we came to appreciate Key West all the more for the gem that it is. There is so much to love about it. There is also reason to understand that there are trends which are impacting the economy and the community which present opportunities—and challenges. Changes over which we have limited control will force us to action even as we try to maintain our identity and provide a measure of stability in our economy.

In summary, this document is the Committee’s best effort to present to the citizens of Key West a strategic plan that will protect and enhance our core values while bending to economic and social realities.

INTRODUCTION

The Strategic Planning Committee, established by City Commission Resolution 10-036, called for each Commissioner to appoint one person from his or her district and directed the Strategic Planning Committee to appoint two additional members. The committee first met in late April, 2010 to organize, hire a consultant, and begin to study the past decade. Our charge took us beyond the 2005 Strategic Plan's focus on City government goals to include what type of society Key West was to become and what all residents collectively could do together to help create that society. We focused at first on our changing demographic context as well as a review of those surveys and studies of resident values and concerns. We then proceeded to examine strategic plans from other small U.S. cities, and began a limited consideration of nationwide research. Relevant data and insight from this material is cited and referenced in Attachment II. An early decision by the committee was to settle on a learn-as-you-go approach to planning. The more we learned about changes which had occurred, and values that were important for community and economic reasons, the better we understood the required parameters of a Strategic Plan for Key West.

From our background study and evolving concept of what needs to be protected and enhanced, we developed goals and actions that seemed both necessary and desirable. That is the backbone of our strategic plan. Following is a summary of what we learned to be of critical importance in developing the plan.*

Understandings:

- This plan will depend on mutual responsibilities for implementation among government, business, nonprofits, civic organizations and individuals.
- Though not new, we have underscored the importance of understanding the value congruence between residents and visitors: "the same things that make Key West a wonderful place to visit also make it a wonderful place to live".
- Demands from both today's residents and visitors are high: we want more and better quality everything, from infrastructure to art, "One Human Family" to a beautiful environment.
- The natural and built environment and unique culture are the essential building blocks of our "place-based" economy.
- Much of our total personal income is mobile—far above the average for other U.S. jurisdictions—and we must protect and enhance those values that draw people here.

Challenges:

- It will take skillful and thoughtful leadership to strike a long-term healthy balance between Key West tradition and vision—honoring history and becoming modern—as well as between community and commercial values.
- Key West has “destination” competitors at the state, national, and international levels who are increasingly investing in culture to spur economic growth.
- There is a documented concern from both Key West residents and visitors about “value for the price” – is Key West overpriced for “product” offered?
- When things are going well, it is difficult to spur action but our review has taught us that there will likely be a high price for inaction.

* The bullets under Understandings and Challenges are discussed in Attachment I.

UNDERSTANDING OUR PAST TO UNDERSTAND OUR FUTURE

Almost 200 years of boom and bust economic history suggests an inevitability in the fortunes and misfortunes of Key West. The 2011 Strategic Plan was framed around the idea that maybe this time it can turn out more to our advantage: **strategic investments of time and money, guided by a broad, well-informed resident and visitor-based plan, could enhance the quality of our lives and the lives of those who follow us for generations to come.**

To understand the lessons of history, it is necessary to hearken back to Key West's beginning in the early 19th century, when it was established as a base for controlling piracy in the Caribbean. Since that time it has seen periods of rapid growth and decline which were largely dependent on the decisions of entrepreneurs or the federal government. In the early to middle 1800s, Key West was the largest and purportedly the wealthiest city in Florida, built primarily on shipwrecking entrepreneurship. Those early glory years rather abruptly came to an end with the arrival of a string of lighthouses which effectively alerted ships to the dangerous reef. Within the next 100 years Key West experienced a series of ups and downs in successive economies, based on harvesting sponges, high paying jobs in the cigar industry, the coming of the railroad, turtle harvests, fishing, and the enduring military presence. But the good times have been invariably punctuated by decisions and events such as hurricanes and the Great Depression that crippled the local economy, tearing out all but the soul out of Key West.

Even the long-steadying influence of the military dramatically declined in the mid to late-20th century when the federal government decided that a federal security presence was no longer as critical as it once was in the southernmost city. A tourist industry began during the 1930s, and though helpful as a source of income for local residents, took decades to develop. Slowly, however, through persistent marketing, aided by the federal government and the unexpected but welcome arrival of writers and artists who got the word out in their own ways, visitors came and gradually the economy stabilized.

Leading up to and including the first decade of the 21st century, the Key West economy has done admirably well* with not only a flourishing tourism but also an influx of persons with wealth earned elsewhere to purchase both permanent and seasonal homes and to otherwise provide considerable sustenance to the economy. In an unusual but fortuitous development, these three crucial demographic groups—permanent residents, seasonal residents and visitors-- have formed a rare community of interests based on things many in each of these groups love about Key West. As the 2004 Key West Resident-Visitor Study put it, "The same things that make Key West a wonderful place to visit also make it a wonderful place to live." Together, our more recent demographics and those unique Key West qualities that have drawn so many to this island have become the engine of a productive economy. In short, ours has become

a “place-based economy”—an economy not reliant in the typical way on everyday things produced for export, not even cigars, turtles or sponges, but an indigenous economy dependent on where we live (natural and built environment), who we are (our history, an open and accepting and at times quirky culture) and what we do (arts, music, literature, cuisine, events and festivals).

Every epoch in Key West economic history has probably seemed at the time destined to last forever. But none did. Good times have been invariably followed by hard times—and the cycle has repeated. Perhaps the present economy will fare no better. Hurricanes will come and the larger U.S. and world economies will affect us. But the 2011 Strategic Plan suggests a vision that is practical, and aligns with predominant and stable resident and visitor values regarding our local economy as well as our quality of life. The realization of the plan depends on our willingness as a community to decide to work together to support long term interests. That is the essential lesson our Committee presents to the City Commission as it considers adoption of this Strategic Plan and our recommendation for a community-based implementation plan.

*The military continues to be a vital part of the economy and community, but is largely out of the purview of local planning.

VISION

Key West has a beautiful natural environment with a vibrant culture, interesting historical architecture, active neighborhoods, and community-wide interests that are supported by involved residents from all walks of life and a responsible and responsive government.

MISSION

Our mission is to protect our natural and built environment and honor our local heritage and cultural identity with citizens actively engaged in the life of our neighborhoods and community. Together we shall promote ongoing redevelopment of a sustainable economy, quality of life, and modern city infrastructure. Our government shall act on behalf of the long-term, generational interests of residents and visitors of Key West.

The Economy

Goal # 1: Economic growth and diversification that sustains a healthy economy

Objective: Support and nurture existing sources of income for the City and community while encouraging the development of new ventures

Initiatives:

- *Creation of a City Venture Development Office to facilitate and solicit new business ventures*
- *Initiate a study of policy alternatives that would support new economic ventures and focus on the ease of doing business for city clients and customers*
- *Recognize and nurture military and non-military government and government related employment and their contribution to the local economy*
- *The City Manager will call annual meetings of business and other interests to discuss what is happening in the U.S. and Cuba that can possibly impact the status quo*

Objective: Continue to develop the greater Duval Street area as the mixed use, vibrant, commercial and social center of the City

Initiatives:

- *Charge the Duval Street Committee to design a plan for the Duval Street corridor that reflects its multiple uses and protects its historic character*
- *Increase security through Chamber of Commerce and Business Guild programs educating employees and customers on how to stay safe*
- *Partner with local business owners and the Duval Street Committee to make streetscape improvements*
- *Review and adopt as deemed appropriate the recommendations of the Traffic Study*
- *Increase the number and ensure cleanliness of public restrooms*

Goal # 2: Commercial and residential (re)development that is appropriate to a small city and enhances the sociability of neighborhoods

Objective: City documents reflect a clear and cogent approach to development and re-development

Initiative:

- *The City Commission appoints representatives to study congruency of the development/re-development process and related documents*

Objective: Increase efforts among City, County and State governments to develop a vision for the Lower Keys area that enhances our larger regional sense of community as well as regional aesthetic appeal, environmental enhancement, and economic vitality

Initiative:

- *The City and County appoint representatives to study and recommend long-term goals for the area*

Goal # 3: Optimum 'Key West' experience

Objective: *The community understands the needs, issues and concerns of residents and visitors*

Initiatives:

- *Annual and decennial review of visitor perceptions*
- *Annual and decennial review of resident perceptions*

Goal # 4: Invest in the development of our workforce

Objective: *Understand the needs, issues and concerns of the hospitality workforce and employers*

Initiatives:

- *Review and update TDC report on the Hospitality Workforce*
- *Encourage our business community to intensely educate staff to become more knowledgeable and enthusiastic about the business, agency or interest with which they are engaged as well as about the City at-large*
- *Encourage businesses to educate their staff on the vision and ethics of the City*

INDICATORS OF SUCCESS:

- Increase in business ventures in the City
- Completion of a study of policy alternatives
- City Commission assigned contacts with the military to facilitate communication
- Meetings are held to discuss Key West/Cuban issues
- Design plan for Duval corridor is created and implemented
- Decrease in reported crimes
- Improvements undertaken by the Chamber of Commerce, the Business Guild, and Duval Street Committee
- Increase in the number of public restrooms
- Completion of a review of approach to development and redevelopment and related documents
- Annual Resident Survey
- Visitor feedback
- TDC reports
- NOAA Study
- Chamber of Commerce Annual Report

The Environment

Goal # 1: A natural environment that enhances the “Key West experience” for residents and visitors alike

Objective: Ongoing protection and monitoring of our local environment

Initiatives:

- *Partner with local environmental groups to monitor the environment*
- *Conduct an environmental scan to provide a baseline for future environmental audits*
- *Develop and implement, in collaboration with special interest groups and the Monroe County School District, a comprehensive education plan for residents and visitors which focuses on protecting and enhancing the environment*
- *Implement the guidelines spelled out in the Key West Climate Action Plan in each city department using the recommended checklist process to be signed and posted on the city website annually*
- *Place recycling receptacles throughout town*

Goal # 2: The City’s built environment reflects and supports Key West values, architectural history, and mixed uses

Objective: Strict adherence to HARC guidelines, land development regulations and the Comprehensive Plan

Initiative:

- *Annual review of approvals which fall outside HARC guidelines, land development regulations, and the Comprehensive Plan*

Objective: Establish a level of design excellence for the entire city

Initiatives:

- *City Planning Office develops an Urban Design Plan as a part of the City’s Comprehensive Plan*
- *Consider design factors such as signage, lighting, shade trees and seating which makes streets inviting and adds to the residents’ and visitors’ experience in all development and redevelopment*

Objective: Improve streetscapes

- *Enforce existing littering laws and ordinances*
- *Educate and encourage homeowners to clean from their house to the curb*

Goal # 3: The conservation and responsible consumption and disposal of all natural and manmade resources

Objective: Five percent increase in recycling per year

Initiatives:

- Adoption of mandatory recycling for all residents, businesses and non-profits and enforcement with applicable fees
- Implementation of the Vision and Mission of the Key West Clean and Green Committee

Objective: Municipal services which are environmentally sensitive and promote attractive spaces

Initiative:

- Partner with providers for monitoring purposes

Goal # 4: The City leads by example utilizing sustainable practices in city operations

Objective: Departmental action plans outlining green practices

Initiatives:

- Each city department keeps a record of efforts to go green
- Educate City department heads on 'Green Purchasing'
- Establish annual goals and develop an Action Plan for the reduction of fossil fuels by the City's fleet
- Construct all city facilities adhering to LEED or similar standards
- Establish a green house gas emission target and monitor and report on it annually

Goal # 5: Partnership with community groups to address environmental issues and increased public education about environmental concerns

Objective: A community-wide environmental agenda

Initiative:

- Collaboration with state, county, and community partners to develop a community-wide environmental Action Plan including goals and timetables

Goal # 6: Key West is seen as a viable destination for "Environmental Tourism"

Objective: Expand the brand Key West to include promoting the environmental aspects of the island

Initiative:

- Promote "Environmental Tourism" through the promotion of environmental events and festivals

INDICATORS OF SUCCESS:

- Statistics/Data collected on the condition of the reef, air and water quality
- Annual Resident Survey
- Annual report to the City Commission by the Tree Commission regarding extent of tree canopy
- Departmental checklists addressing key elements of the Key West Action Plan are developed, signed and posted on the City website
- Increase in number of recycling receptacles throughout town
- Annual Code Compliance reporting
- Number of HARC approvals granted which fall outside their guidelines
- Annual HARC report to the City Commission on issues and improvements in protecting historical architecture
- Increased percentage of solid waste being recycled
- Development and implementation of an Urban Design Plan for the City
- Annual report to the City Commission on responsible consumption by the Sustainability Advisory Board
- Reported progress by the Key West Clean and Green Committee
- Annual City Manager's Report to include green initiatives
- Development of a community-wide environmental agenda and annual reporting of progress towards goals

Culture

Goal # 1: The identification and promotion of the “unique” character and culture of Key West

Objective: Recognize and promote Key West as America’s Caribbean Island; a confluence of Bahamian/British aristocracy, African American, Cuban, European, and influences from across the U.S.

Initiatives:

- *Key West’s cultural mix is reflected in marketing efforts*
- *Historical markers noting the community’s various cultural strains and their contribution to the community will be erected and maintained*
- *A map of cultural history points of interest will be created and distributed at lodging establishments, the Business Guild, and the Chamber of Commerce*
- *Capture our tradition of diversity through oral histories, documents, and historic images*

Objective: Promote Key West as an open community in which socio-economic levels, ethnicity, and a variety of lifestyles readily mix

Initiative:

- *Marketing efforts reflect images and language that depict Key West as a broadly open community – One Human Family*

Objective: Promote our History

Initiative:

- *Nurture and promote opportunities for learning about our history through the library, the community college as well as historical, archeological and cultural resources, programs and services*

Goal # 2: Key West seen as a viable destination for “Cultural Tourism”

Objective: Expand the brand Key West to include promoting the cultural and creative spirit of the island

Initiative:

- *Support “Arts Tourism” through the promotion of culture-related events and festivals*

Goal # 3: The arts are an integral part of the living environment in Key West

Objective: Cooperative efforts among public and private art, music, dance, theater, literary and businesses and civic groups to promote the arts

Initiative:

- *Promote and support funding for the creative arts*
- *Partner with the Art in Public Places leadership to develop a Public Art Master Plan setting priorities for the locations and funding of projects and providing a framework for the shared financial and professional resources needed*

INDICATORS OF SUCCESS:

- Marketing strategies include references to our history and our culture
- Increase in the number of historical markers
- Cultural history maps have been developed and are being distributed
- Number of times “Bohemia in the Tropics” has been aired in a six month period
- Arts Council report to the City Commission
- Art in Public Places Board report to the City Commission
- Public Art Master Plan has been developed

Infrastructure

Goal # 1: A transportation system which is aesthetically attractive, functional, efficient, safe and environmentally sensitive

Objective: Completion of the Transportation Study and development of an Action Plan to address recommendations

Initiatives:

- *Development and implementation of a Multimodal Transportation Plan*
- *Coordination with the county, state, and FDOT to provide for ongoing improvements, maintenance, and ADA compliance of streets and sidewalks*

Objective: Increased usage of public transportation

Initiatives:

- *Educate residents and visitors regarding available Public Transportation*
- *Provide bus schedules at bus stops*
- *Use technology to provide bus schedule information and trip planner*

Goal # 2: Safe and secure neighborhoods and business districts

Objectives: Allocation of resources to support adequate personnel, facilities and equipment for:

Code Enforcement

Law Enforcement

Fire and Rescue

Hurricane Preparedness

Environmental Disaster Response

Homeland Security

Initiatives:

- *Proactive planning to address community safety needs*
- *Compliance with existing codes*
- *Collaboration with neighborhood associations to establish crime watch areas*

Goal # 3: Parks and recreation areas are accessible to all residents and visitors

Objective: Parks and recreation areas distributed throughout the community which are appropriately staffed and equipped to provide safe, healthy, and constructive recreational opportunities for children, youth and adults

Initiatives:

- *Conduct an assessment of the City's parks and recreational areas and develop an Action Plan to address deficiencies*
- *Develop Truman Waterfront Park*

Goal # 4: Long term sustainability of the City's hard assets

Objective: Accurate inventory of the City's hard assets including review of city-occupied dwellings

Initiative:

- *Development and maintenance of an ongoing inventory process for the City's hard assets*

Objective: The efficient and effective maintenance of the City's hard assets

Initiative:

- *Development and maintenance of an ongoing assessment and maintenance process for the City's hard assets*

Goal # 5: All of the City's destinations and resources are accessible to residents and visitors

Objective: Increase the visibility and viability of areas outside of the Duval Street corridor

Initiatives:

- *Create bicycle and pedestrian friendly pathways for accessing and connecting areas to each other and downtown*
- *Partner with the Key West Bicycle Association to have the City recognized as a 'Bicycle Friendly Community' by the League of American Bicyclists*
- *Install and maintain unmanned location and information kiosks throughout the city indicating attractions and available public services*
- *Bahama Village Redevelopment Advisory Committee will develop a long-term vision and plan for the development of Bahama Village and submit it to the City Commission within one year of the adoption of the 2011 Strategic Plan*
- *The City Commission will develop, or charge a committee with developing, a long-term vision and plan for the development of the Key West bight and Caroline Street corridor and submit it to the City Commission within one year of the adoption of the 2011 Strategic Plan.*

INDICATORS OF SUCCESS:

- Annual Resident Survey
- Visitor feedback
- Development and implementation of an ongoing inventory assessment and maintenance process for the City's hard assets
- Increase in number of bicycle pathways
- Key West's designation as a 'Bicycle Friendly Community' by the League of American Bicyclists
- The creation of a long-term plan for the ongoing maintenance and improvement of streets and sidewalks
- Installation of location/information kiosks
- Submission of a plan for the development of Bahama Village and ongoing annual progress reports until the plan is completed
- Submission of a long-term vision and plan for the Key West Bight and Caroline Street corridor and ongoing annual progress reports until the plan is completed
- Annual Report by the Truman Waterfront Advisory Board

Government

Goal # 1: An ethical, open and accountable relationship between City government and the citizens of Key West

Objective: A Code of Ethics governs the actions of the City Commission and all City employees and contractors

Initiatives:

- *Adoption of the Code of Ethics*
- *Citizen committee reviews adopted ethics ordinance every two years to recommend changes to the City Commission*

Goal # 2: A fair and equitable balance between those policies that address community values and those that relate to the economy

Objective: Our economy is enhanced while continuing to enhance our community values

Initiative:

- *Consider impact on the community and community values in all decision making*

Goal # 3: Team Key West - Cooperative planning efforts among organizations, businesses, and all government agencies

Objective: Collaboration among community partners to address specific concerns

Initiatives:

- *The Mayor of Key West or designee will invite members of various organizations to collaboratively address one area of need each year for the lower Keys region*
- *Development of an Action Plan for the selected area of need*

Goal # 4: The City is guided by one vision with resources focused on progress towards established goals

Objective: Alignment of the City's Comprehensive Plan, Action Plan, Capital Improvement Plan, departmental business and performance management plans and the City budget with the 2011 Strategic Plan

Initiative:

- *The City Manager and one Commissioner will co-chair a citizen and public employee appointed committee to align the plans*

Goal # 5: An operating and capital-improvement strategy which is structurally balanced over the long term and provides for the effective and efficient management of resources

Objective: Planned management

Initiative:

- *Implementation of the 5 Year Capital Improvement Plan*

Goal # 6: A legal and financial framework that develops and sustains a high performing workforce

Objective: Employee contracts and policies are fair and promote ethical conduct

Initiative:

- *Employee panel to conduct a review, every two years, of policies that affect conduct, work, and procedures*

Objective: A skilled and efficient workforce that delivers quality services and reflects the diversity of our community

Initiatives:

- *Maintain sufficiently competitive pay and benefits to attract quality employees to City government*
- *Development and implementation of an annual Employee Evaluation Process based on established performance metrics*

Goal # 7: Ongoing assessment of government functioning

Objective: Implementation of a formal citizen feedback mechanism

Initiative:

- *The City Commission shall appoint four citizens who, along with three persons appointed by the City Manager and assisted by IT, shall prepare an Annual Resident Survey, addressing issues contained in the 2011 Strategic Plan and other areas of concern for the City*

Objective: Enhance the City website

Initiatives:

- *Improve communication through increased usage of available internet tools*
- *Develop and implement a uniform resident response tracking system for all non-public safety departments*
- *Update the website format to make it more easily accessible and user friendly*

Goal # 8: The City grows and develops in a manner that supports existing values

Objective: Development in the City is guided by plans which protect and enhance the City

Initiatives:

- *A Strategic Plan Implementation Committee will be created (see Page 24) to generate the ideas, energy, and resources to guide the efforts of public, nonprofit, civic, and private sectors to steer the future direction of Key West.*
- *The City Planning Department is staffed and adequately funded so as to support the development of a Comprehensive Plan within two years of the adoption of the 2011 Strategic Plan.*

Objective: Growth and development efforts are guided by an established design plan for the entire city

Initiative:

- *An Urban Design Plan is developed and incorporated into the City's Comprehensive Plan*

INDICATORS OF SUCCESS:

- Adoption of a Code of Ethics by the City Commission
- Visitor feedback
- Development and Implementation of an Action Plan to address the area of need identified by the Mayor
- The City's Comprehensive Plan, Action Plan, Capital Improvement Plan, departmental business and performance management plans, and the City Budget have been aligned with the 2011 Strategic Plan
- Biannual report to the City Commission by the City Manager
- Formation of an employee panel to review policies that affect work, conduct and procedures
- Development and implementation of an ongoing Annual Resident Survey
- Development and implementation of a Comprehensive Plan within 2 years of the adoption of the 2011 Strategic Plan
- Development and implementation of an Urban Design Plan as part of the Comprehensive Plan

Quality of Life

Goal # 1: Key West protects and promotes the health of its residents and visitors

Objective: Community health care concerns are identified and addressed

Initiatives:

- The Monroe County Health Department will present to the City Commission a summary of the annual Health Profile
- In conjunction with the Monroe County Health Department, the City will proclaim 'Health Month' implementing a community awareness and education campaign by partnering with businesses, non-profits and the Monroe county School District

Goal # 2: Options for housing are available to meet the needs of our population demographic

Objective: Housing is available at various income levels

Initiatives:

- Support public and private efforts to make low and middle income housing attainable
- Explore means of managing insurance costs for those providing affordable housing
- Creation of tax benefits for existing affordable rental units
- Complete inventory of assigned existing affordable rental units and City owned property suitable for development as affordable housing
- The City Planning Department completes an analysis and needs assessment on the City's affordable housing

Goal # 3: Key West offers its children, youth and adults educational opportunities from early readiness through lifelong education

Objective: Increased awareness of and involvement in community educational opportunities

Initiative:

- Utilize the City's website to disseminate information on community educational opportunities

Goal # 4: Full and part-time residents (children, youth and adults) are actively involved in the community

Objective: Increased involvement in community service projects offered through schools, neighborhood associations, and civic and social groups

Initiative:

-
- *Utilize the City's website to disseminate information on volunteer opportunities*

Goal # 5: Improve the quality of life for all

Objective: Reduce homelessness

Initiative:

- *Partner with community groups to increase access to support services and medical care*
- *Partner with organizations working to prevent homelessness, provide outreach, support and services to the homeless population*

Objective: Reduce the impact of vagrancy

Initiative:

- *Strengthening and enforcement of existing laws and ordinances*

INDICATORS OF SUCCESS:

- Annual Health Profile is presented to the City Commission
- 'Health Month' declared and community awareness and education campaign takes place
- Development of inventory list of assigned affordable rental units
- How many homeless individuals have obtained permanent housing in the year
- Number of low and middle income housing units that have been added in the year
- Creation and implementation of tax benefits for existing affordable rentals
- The annual report of progress to the City Commission from SHAL in conjunction with the Mayor's Homeless Committee
- Ordinances dealing with vagrancy are strengthened and enforced

IMPLEMENTATION

Rationale:

The following recommendation follows the central idea that the 2011 Strategic Plan is a community plan, or as Commissioner Weekley expressed it, a “Plan of the citizens of Key West”. This recommendation for implementation assumes also that a successful plan will be by the citizens through the efforts of individuals, non-profit, and civic organizations as well as city government.

Implementation Plan:

The Commission will appoint a Strategic Plan Implementation Committee which will be charged with the overall implementation of the Strategic Plan. An early phase of their work might well include arranging for experienced leaders from other cities (e.g., Mayor, Commissioner, outstanding civic leader) to come to Key West to discuss lessons learned in carrying out strategic plans in their cities. The leaders’ visit to Key West may include holding discussions with the City Commission as well as with Key West community leaders invited to represent various organizations who wish to take part in implementation.

The purpose of these visits would be to help energize the political will and to demonstrate the feasibility of our shaping what we become as a community. Key West might also learn more about how other cities have supported community involvement and made discernible progress towards their goals.

Regardless of the decision to extend invitations to outside leaders, the Implementation Committee will be responsible for encouraging on-going community interest, establishing a framework for implementation, and for strategically managing the implementation process. The framework will provide for:

- a physical design of how Key West will look when the plan is implemented
- maintaining an on-going assessment of the Key West environment (e.g., demographic, economic, resident/visitor values)
- linking strategic planning to other decision-making (e.g., budgeting, planning)
- planning the over-all schedule for implementation of the initiatives (following Commission-approved priorities)
- coordinating the monitoring, evaluation, and reporting of the progress of each project
- reporting to the Commission on at least a quarterly basis, including an annual report which will summarize the annual resident surveys, progress on the Strategic Plan, and a status report on the required five year Evaluation and Appraisal Report (EAR).

Activities that are currently being carried out by city government – or clearly could best

be carried out under jurisdiction of city government --will proceed with only coordinating responsibilities with the Strategic Plan Implementation Committee.

Those community organizations that agree to take on strategic planning-related efforts, either solely or in partnership with other organizations or public agencies, will maintain management and operational independence.

ATTACHMENT I

A DISCUSSION OF THE UNDERSTANDINGS AND CHALLENGES ADDRESSED IN THE INTRODUCTION

Understandings in Developing this Plan:

In order to make the case for a strategic plan, we have provided data sources (see Attachment II) and in this section, highlights of things we learned and challenges we must confront.

First, an important insight was that a successful plan for our city will require that we **take mutual responsibility for implementing this plan**. Government, businesses, nonprofit groups, civic organizations and individuals working separately cannot get us to the future that residents and visitors have envisioned. We have mutual responsibilities.

Secondly, we reaffirmed the City's 2004 Resident and Visitor Study in stating that "the same things that make Key West a wonderful place to visit also make it a wonderful place to live." In a word, what most visitors want, most residents want. This resident-visitor agreement on values means that there did not have to be one plan for residents and a separate plan for visitors.

But we are not off the hook - as **demands for quality** are increasing. Excellent basic services are expected – these issues (personal safety, clean drinking water, and a clean city) are included in the Infrastructure, Quality of Life, and Government domains. Examples such as personal safety, clean drinking water, and a clean city are basics and simply expected.

Our third observation is that high demands are also made in the Culture and Environment Domains. These are what make Key West so rare and which form the core attractions of our "place-based" economy: aside from good weather, a beautiful natural environment, historic architecture, controlled growth and a pedestrian and bicycle friendly city. Equally as valuable, as these domains highlight, are a tolerant, welcoming community, a diverse and lively culture and an involved citizenry. This human dimension is summed up in our touchstone "One Human Family" motto which beckons people from all over the U.S. and the world to visit and live in Key West.

Reviewing the data from this perspective leads us to a fourth key understanding for this plan: what is good for the environment and the culture is good for the economy. **These three key elements in our strategic plan re-enforce one another in a very fortunate congruence.**

As it turns out, an **unusually high percentage of resident income, compared to that of the United States as a whole, has come from interest, dividends, pensions and the like.** Well over half of the resident income as reported to the IRS can go to mailboxes anywhere in the world. In the vernacular, a sizeable portion of our local economy—residents, seasonal residents and visitors alike--has legs and can leave the Keys if we are inattentive to this balancing act.

Challenges:

Clearly we must strike acceptable **balances between tradition and vision as well as between community values and commercial activity.** The message in a nutshell: change, but maintain uniqueness; keep up with the times, but don't become "Anywhere U.S.A."

A second challenge is that we need to be acutely aware that **Key West has competitors.** As the mayor of Charleston, S.C. suggested, interesting and attractive cities not only compete across the U.S., but are also in an international competition. At least one-fifth of our Key West visitors come from abroad. And as one study noted, there is a growing movement for cities worldwide to invest in culture to spur economic growth.

The issue of competitiveness is underscored in that, though visitors say they would like to come back to Key West, residents and visitors alike also say that a highly important but unsatisfying aspect of living or visiting here is **"value for the price."** So far, notes NOAA Chief Economist Leeworthy, demand for Key West remains strong, but as one of the highest priced tourist markets in Florida, our value for the price is always being compared. From this perspective, a major challenge will be to either lower prices or increase the value of the Key West experience for major parts of all three population groups—visitors, seasonal and permanent residents.

What if we choose not to become pro-active? **A sustainable economy requires that we take charge.** An historical earlier dependence on, for example, sponging, cigar-making and the Navy, put us at the mercy of the decisions of others. But at least now, in our culture-and-environment-driven economy, **we can be in charge of our destiny.** We believe that leaving things to chance is NOT a gamble worth taking. Leadership with a long-term and broad vision is necessary to develop both a sustainable economy and to protect enduring community values.

Attachment II

DATA AND REFERENCES THE STRATEGIC PLANNING COMMITTEE CONSIDERED IN DEVELOPING THE KEY WEST STRATEGIC PLAN

Note: The general demographic and economic profile is followed by references in chronological order; books follow studies

The Strategic Planning Committee (SPC), early in its' discussions, committed to reviewing existing research and documentation from national and state data sources; as well as studies, surveys and proceedings of and about Key West. This consisted of first, a broad review of demographic and economic trends that have been occurring in Key West--and the County where only county-level data was available--during the first decade of the 21st century. Second, we made a commitment to review citizen views as they were expressed through an array of studies, surveys and proceedings. Given the extensive documentation already in place as we began our work, we did not feel the need to develop a new survey but rather to use existing work in the development of the Key West Strategic Plan.

These documents are of varied scientific validity, but all contributed to our findings as presented in the proposed Strategic Plan. The more informal data from these documents were able to be used as re-enforcing evidence when we found similar themes across documents.

Introduction: A Profile Of Change 2000-2009

The summary table below is followed by explanatory notes on each of the cells in the table.

Summary Table of Demographic and Income Change

	Permanent Residents (2000 to 2006- 2009*)	Seasonal Residents (2000 to 2006-2008)	Visitors*** (1998 to 2008)
Number of People	(1**) – 12% (KW 2009 only)	(2) + 57% (KW)	(3) – 14% (MC = all of Monroe County)
Median Age	(4) + 6% (KW)	(5) + (see note re: this cell) (KW)	(6) + 6% (MC)
Income	(7) + 22% (KW)	(8) + (see note re: this cell) (KW)	(9) + 35% (MC)

* 2006-2009" is a 4-year Census estimate made in 2010

**Cell Numbers (in parentheses) refer to "Cell1", "Cell 2" etc. below. That information is important for accurate interpretation.

Population

Cell 1 - Permanent Resident Population

Source: Census

	2000	2009	% change
Key West	25,478	22,463	- 12%
Monroe County	79, 589	73,165	- 8%

Key West population projections*

Source: Bureau of Economic and Business Research (BEBR: Business School, UF)

Key West	2010	2015	2020	2025	2030
Low	23,498	22,599	21,669	20,770	19,902
Medium	24,242	24,056	23,839	23,622	23,405
High	24,955	25,482	25,823	26,443	26,908

*Extrapolation from Bureau of Business and Economic Research (BEBR), University of Florida, V. 43, Bulletin 156, March 2010 (see Table 11).

Cell 2 - Seasonal Resident Population

Source: Derived from Census

	Yearly Average Seasonal Population*
Key West 2000 (vacancy rate = 17%)	2,000 (KW Eval & Appraisal Report est.)
Key West 2006-08 (vacancy rate = 34%)	4,703
Monroe Co. 2000 (vacancy rate = 32%)	16,002
Monroe Co. 2006-08 (vacancy rate = 44%)	22,924

* Average based on an assumed 50% occupancy as a yearly average of only those vacant units that are neither for sale or rent; assumes average household size in KW for numbers in each unit.

Cell 3 - Visitor Population

From 1996-2008, the number of visitors to the Keys decreased by 2.33 million (from 16.27 million to 13.94 million) (NOAA: Linking the Economy and Environment of the Florida Keys/Key West. National Oceanic and Atmospheric Administration, December, 2009).

Cell 4 – Median Age: Permanent Resident Population; Source: Census

Median Age	2000	2006-2009	% increase
Key West	38.9	41.4	6%
Monroe County	42.6	47.2 (2006-2009)	10%
Florida	38.7	39.7	2.6%
U.S.	35.3	36.7	4%

Changes by age categories: During the period 2000 through 2006-2008 in Key West, ages 20-55 decreased 10.6% and those 55 and older increased 9.4%

Cell 5 - Seasonal Resident

There is no data for the age of seasonal populations. We reasoned that along with the increasing ages of permanent residents as well as visitors (Cells 4 and 6), it is likely that the seasonal population is also increasing at a somewhat at a similar rate.

Cell 6 - Visitor Population

The average age of visitors to Monroe County in 2007-08 was 49.5. In the winter months the average was 54.3. In the 12 years between 1996 and 2008, visitors to the Keys increased in age by 6% (NOAA), nearly 10% in the winter season (derived from NOAA).

Income

Cell 7 - (3 Views) Permanent Population Only

Census: Per Capita Income (median)

Median Per Capita Income	2000	2006-2009	Change	Key West & Monroe compared to Florida
Key West	\$26,316	\$33,800	+ 22%	19 % higher
Monroe Co.	\$26,102	\$36,086	+ 28%	29% higher
Florida	\$21,557	\$26,503	+ 18%	-----

OEDR (Office of Economic and Demographic Research, Florida Legislature) Monroe County; KW data not provided from this source

Median Salary	2008	Monroe compared to Florida
Monroe County	\$36,626	-----
Florida	\$40,579	FL is 10% higher

IRS, 2007 Tax Year; Total Income by Zip Code*

	Monroe	Florida	U.S.
Income derived from salaries, wages, tips, bonuses	37%	59%	70%
Income derived from investments, interest, pensions, SS etc	63%	41%	30%

* KW jurisdiction alone not available

The NOAA study (XV below) discusses "a continual decline in the percentage of income earned by work in Monroe County. By 2008, only about 49% of income received by residents of Monroe County was received from work within Monroe County" (p. 2).

Cell 8 - Seasonal Population

There is no data on the income of seasonal residents. It seems reasonable, however, that the income of those with a second home is keeping pace with the median of other residents and visitors.

Cell 9 - Visitor Population

Visitor income showed a marked change upward between 1996 and 2008, with those making over \$100,000 having increased 35%. Every income category less than \$100,000 saw a decrease in numbers of visitors. Overall visitor spending was up 22%. (NOAA)

Background data from Key West Comprehensive Plan, 2010

	Daily Average for 2008 (resident); 2009 for all others	Daily Average for March, 2008 (resident); 2009 for all others
Permanent Residents	22,364	22,364
Seasonal Residents	4,703	8,276
Commuters	5,315	5,315
Overnight Visitors	15,984	18,344
Visitors who Stay with Family/Friends	320	367
Day-trip Visitors	2,330	2,675
Cruise Ship Visitors	2,355	2,526
Total Average Daily Persons	53,371	59,867

*Compiled data or estimated from a. Census, b. Tourist Development Council/Smith Travel Agency, c. NOAA, d. Labor Force estimates, e. KW Port Authority

Estimates of Tourism Economic Impact in Key West

Economic Contribution of Recreating Visitors to the Florida Keys/Key West”, part of the larger study Linking the Economy and the Environment Of Florida Keys/Key West, NOAA, (2010; cited XV below). The authors put visitor spending in Monroe County at \$2.234B (p. 7) during the Dec 2007 – November 2008 period or 60% of total sales indirect and induced effects (multipliers). [See also VI and VII below]

Total Number of Visitors (person days) and Visitor Spending in Key West
by Means of Access*

Means of Travel	Total Visitor Number	Percent of Total Visitor Number	Total Visitor Spending	Percent of Total Visitor Spending
Auto: Overnight	3.32M	55%	\$569M	54%
Auto: Day Trip	.48M	8%	\$48M	5%
Air	1.3M	22%	\$343M	33%
Cruise Ship	.74M**	12%	\$62M	6%
Ferry	.2M	3%	\$23M	2%

*Source of data: NOAA; calculations for this table by Strategic Planning Committee.

**Source: City of Key West Port Operations. All figures above based on December 2007-November 2008 data

Studies, Surveys, and Proceedings of City-Wide Meetings

The following studies, surveys and proceedings were extracted for data relevant to the Strategic Plan. The findings listed are not intended to be summaries of the entire documents.

I. Vision 2020. Key West Chamber of Commerce (1998, updates 2004, 2008).

The KW Chamber, in conjunction with 10 community groups put together a list of 75 issues and published them as a survey in the Citizen and Island News. Residents were asked to rank order the items. The Chamber then put this info into goals via an all-day conference of 150 community leaders. They have since published two progress reports.

By the year 2020: (14 goals for the city)

Goal 1 workforce housing significantly increased

Goal 2 population will increase 10% (30,000)

Goal 3 expanded 10-month tourist season

Goal 4 we will have protected and enhanced our culture—America’s Caribbean Island

Goal 5 one of the “cleanest small cities in America”

Goal 6 southside beaches restored and accessible

- Goal 7 a walk-able and bike-able island
- Goal 8 infrastructure improved (communications, power, water, sewer, city buildings...power underground)
- Goal 9 linkage to Cuba
- Goal 10 water pollutants reduced by 80%
- Goal 11 viable seafood industry
- Goal 12 cost of government effectively managed and % of local revenue for gov't from property tax reduced
- Goal 13 opportunities for youth improved
- Goal 14 better relationship between government and citizens

The Chamber sought to achieve "the goal of no more than one third of [worker] income...necessary to fund housing." In subsequent follow-up studies, efforts to achieve this goal were documented but the goal remained elusive and, according to the FIU study, may even be further from realization than it was in 1998. The Chamber has also suggested that we "keep a close eye on Cuba and actively plan for its opening" (2004 update).

II. Key West Resident/Visitor Planning Committee Report (November, 2004).

This Commission-appointed committee consisted of 14 Key West residents.

They shared Five Common Beliefs to frame the Comprehensive Plan:

- residential neighborhoods are important
- tourism is principal, but passive income is significant
- climate, environment, water, history, diversity, lifestyle are all valued
- marine environment important
- history and historic buildings are our legacy and need to be preserved

Broad Goals:

- "Preserve and enhance the uniqueness of KW"
- "Assure a sustainable environment" for our economy (noted as tourism based but "passive income" is a significant secondary component...)

Central thesis of committee's thinking:

- What is good for residents is good for visitors (clean beaches, water, air, general cleanliness, noise pollution, historic preservation, canopy, safety...)

Committee member Chris Belland's letter to the Res/Vis Committee states in part: "I think it is incumbent upon the city to take certain steps to educate both residents and visitors as to who we are, what we want as a community and how to achieve those ends. Whether it is the fact that we wish to enjoy a certain level of quiet...or that we are concerned about water quality, we need to raise the level of awareness of these issues." ...Parks "should not be allowed to become homeless safe zones." [italics added]

This committee made several economic recommendations: market Key West as a boutique conference opportunity; assure that whomever is marketing Key West does so in a way “that is indicative of our pride in our community.”; and “enable the creation of a wireless internet service”.

Other recommendations:

- Noise abatement
- Land, park, beach care
- Visual environment awareness
- City cleanliness
- Historic preservation
- Tree canopy
- Affordable housing
- Homeless
- High turnover of population affects businesses in staffing and “affects the civic fabric of our communities in countless ways.” New residents come in who are unaware of ordinances and community standards
- Multi-modal transportation was listed as a key part of our future but deferred to the study then being done
- “Residents of our city should be defining our special events, rather than letting our special events define us.”

III. Key West Survey on Tourism and the Community. Harris & Associates (December, 2004).

Executive summary: Tourism is good, but not when citizens see that visitors start to intrude, “causing traffic jams, excessive noise, encroachment into residential neighborhoods and invasion of precious privacy....Perhaps the most worrisome impact is the possibility of further development to accommodate more tourists [and] buyers of seasonal vacation homes.... If a showdown were to take place over development...tourism could end up the whipping boy. Therefore, the tourism industry has a major stake in making sure such a showdown does not take place.... In fact, a successful resolution of the residential community’s quality of life concerns will most likely enhance the image of Key West as a highly desirable tourist destination.”

- 76% proud that KW is a tourist town—though 59% want tourism at then-current level
- “A solid 63%...say they would be inclined to support growth in tourism if the city commission would take positive action to preserve and improve the most treasured aspects of life in Key West”
- “86% say it is important to create preservation laws to protect” the character and uniqueness of KW—historic preservation important and on the other side, less tacky and more upscale tourism. “Above all, the public desires adoption of

-
- policies and strategies that respect and preserve the unique heritage and characteristics that distinguish Key West from other communities....”
 - “73% say development, much related to tourism growth, ‘is a threat to Key West’s character and culture.’”
 - 62% feel that the city usually or always favors tourist industry interests
 - “93% want better job of keeping parks and streets safe and clean”
 - “80% want ‘more and better public transportation’”; “56% say traffic congestion is getting worse”
 - 80% more bicycle friendly
 - “77% feel it is important ‘to promote art, theatre, museums, fine hotels and restaurants’”
 - 66% noise reduction
 - 74% want architectural codes to have “...store fronts and signage to fit the character of Key West.” And 65% want to regulate the visual clutter caused by commercial signs.
 - The public’s confidence in the Commission: 58% either not too confident or not confident at all
 - “89% want the City Commission ‘to give equal consideration to the concerns of residents and the tourist industry and to strike a reasonable balance between the two....’”

Comment on ageing population: “without question... age is the most dynamic factor differentiating public opinion in Key West”. Not surprisingly, as we age, our thoughts about what we consider quality of life shift—what we want, where we want to live, what we want to buy. [emphasis added]

IV. City of Key West Citizen Survey. Key West City (July, 2004).

41% response rate from sample of 1000 residents

- Could you have a say in how city government is run if you wanted to? 40% yes
- City government doing a good job? 8% excellent, 38% adequate , 35% somewhat adequate
- Political leadership: 4% excellent, 10% more than adequate; 42% adequate, 35% inadequate
- Top 5 priorities for preservation of quality of life in KW: (total of 24 priorities listed)
 - cost of housing
 - homeless
 - beach and swimming pollution
 - future water supply
 - cruise ship impact
- Top 5 initiatives the City should undertake:
 - Cleaner ocean

Protection of the reef
Preservation of the beaches
Improvement in drinking water
Improved recycling

V. Key West City Business and Economic Development Surveys. Key West City (July, 2004).

33% return on sample of 200 businesses

1) Business men and women in Key West were not confident that the city, even with help from business, education, and community leaders, could successfully develop a viable economic development strategy. The challenges to be overcome, they said, were a lack of an agreed upon plan, the high cost of living in Key West, the lack of land, and lack of a skilled workforce.

2) If the city were to develop a plan, the two most important partners, these business people felt, were the business community itself and the county government.

3) If a successful plan could be developed, a majority felt that it was important to seek diversification in order to a) keep young people from leaving and b) in case of a downturn in tourism. Majorities also felt that diversification would c) help keep taxes in check and help with d) the overall quality of life in Key West.

4) Specific areas picked by a majority for diversification efforts include the arts, music, hospitality, and environmental protection.

VI. Florida Defense Industry—Economic Impact Analysis. Naval Air Station Key West (2005), Vol. 3, p. 30 lists 1,570 military personnel and 1,372 civilian personnel employed. Vol. 2, p. 104: direct DOD expenditures + multiplier effects (also termed “gross regional product”) for defense industry impact= \$592M; Keysnews (March 3, 2009) reported \$635 million for 2007. Strategic Planning Committee (SPC) note: The Florida Governor’s study estimated a \$2.8 Billion Monroe County economy for 2006; defense industry estimates would put “Defense” at 22.6% of the economy. Of the NOAA estimate of \$3.1 Billion economy, the defense industry would be 20.4%. Another view would be to compare total (direct) sales. Table 30 lists this figure in 2007 as \$348M. The NOAA estimate of total sales in the Keys is \$3.1B (2007-2008). This way of calculating would be a 11% contribution.

VII. Study of the Impact of Condominium Conversions to The Florida Keys and Key West, TDC—Jessica Bennett (August 2005).

Committee Note: The following data from this TDC study is included primarily as a demonstration that a sector of the market can change quickly with dramatic consequences for those who live in the Keys.

Following 9/11, tourism took a downturn and funding for hotels was hard to come by. But the “condominium component is an alternate way for developers to raise equity through the sale of units.”

"The demand for condo units created as part of lodging property conversions is really part of a larger drive for real estate as an investment...substantial increase over the past three years."

"...Since 2002, 22% of all non-condo transient units county-wide have been...involved in some form of conversion to condo ownership."

"650 existing campgrounds and RV spots will no longer be available...the county-wide loss is 30%. This has led to a "conversion of marinas throughout the Keys....Florida Keys residents will feel the loss of the publicly accessible marina space." The docks are often packaged with condos and sold as "expensive seasonal homes."

"...A wave of marina space converting to condo ownership that is not in conjunction with transient unit conversion redevelopment projects."

VIII. Economic Diversification Advance Planning for Monroe County, FL.

Office of the Governor (August, 2006). This report provides a gross sales revenue (includes multiplier) figure for the military impact of \$463M* or 16.5% of the economy and a tourism and military combined figure of \$1.8B, or a combined 57.5% of gross sales in the County.

This Advanced Planning report offers "27 strategic recommendations" for "economic diversification and growth". The first recommendation is the "Formation of Lower Keys Economic Development Alliance" as well as "a more proactive approach to workforce training" (though a broader concept than envisioned in the Key West Strategic Plan).

* includes pensions

IX. Study of Monroe County Tourism Workforce. (TDC)—Jessica Bennett (August, 2006).

The TDC studied tourism worker satisfaction in Monroe County cited 114% turnover of employees in District 1 (Key West), though lower in other parts of the Keys and perhaps lower in the current economy.

- 1/4 earn <\$25K 1/4 @\$5-35K, 1/4 \$35-50, 1/4 >\$50 2/3 held one job p. e
- Being able to buy a house likely to influence a departing worker to stay
- 87% of those who left MC in 04-05 were workers
- Factors influencing a worker to stay: 1) increased pay 61% 2) afford housing, buy or rent 45% 3) able to purchase one's own home 45%, 4) promotion 44%, 5) increased in medical
- 56% of tourism employers do not offer medical
- 42% of lodging and 37% of bar/rest employ guest workers
- Cost of living in MC 13% above state average
- Education: no education requirement for job 38%, high school only 40%, voc-tec 14 % ; BA/BS 4% but most tourism workers have some college
- 1/4 of employers offer employee-assisted housing

The study concludes that increased “medical benefits, increased pay, and promotion are very likely to retain workers.” The TDC study emphasizes the large number of workers involved in this industry and their affect on the economy.

TDC staff comment: Affordable housing is the squeaky wheel to get attention; the core issue is cost of living compared to wages and salaries

Committee Note: not a part of this study, but TDC Executive Director Harold Wheeler told our committee in August 2010 that hospitality employees too often were deficient in the English language and often not well informed about either their own establishment or the local area.

Committee comment: From a variety of sources, for example the FIU study cited above and the Florida Legislature’s Office of Economic and Demographic Research, it is clear that what the latter terms “Leisure and Hospitality” is the lowest paying industry which they list (OEDR July 2010).

X. Key West High School: A Study of Current and Former Student Preferences in Living, Learning, and Making a Living Study. Johnston (June, 2007).

In a study sponsored by then-Mayor McPherson to better understand why so many Key West High School graduates had left the city for good upon graduation, 2007 high school seniors and KWHS graduates from the prior 15 years (1991-2006)--of whom counselors, teachers and administrators had estimated 2/3 had left KW-- the top reason for those who had left was inadequate economic opportunity. For seniors, this was # 2 reason behind inadequate educational opportunities.

3% of the graduated respondents living in KW wanted to work in hospitality; 29% had BA/BS degree (apropos of IX above). The small sample makes these numbers unverifiable, but the low numbers of “local kids” working in hospitality is verified by many businesses and Census lists 28% of KW population with a BA/BS or grad degree.

Committee comment: it appears that many who wish to work and live in the Keys are overqualified (at least on paper) for the economy that we offer. Apparently these employees move on to seek other opportunities that offer more salary/benefits and challenges.

XI. Monroe County, Florida Affordable Housing Needs Assessments. FIU (Rodel) (November, 2007).

In a study sponsored by the Roedel Foundation, an FIU study focused on affordable housing but made the following observations regarding the general economy: “...in order to effectively develop local policies and strategies that address the demand for workforce housing, [Monroe County] must first consider their larger economic development vision and goals....” [emphasis added]

This passage went on to note that "...recent historical data strongly suggest that the Accommodation and Food Service sector will remain robust while the rest of the job market will be static.... It seems safe to assume that Accommodation and Food Service will continue to be the leading job creating sector of the economy for the foreseeable future...." But these occupations, the study noted, are "at the **bottom of the wage scale.**" [emphasis added]

Committee comment: The Committee's conclusion from this study was that without better paying jobs, worker satisfaction would remain problematic and high turnover would continue.

Elements that affect housing demand: growth/change in labor market, housing values, household income, and population and household composition. Monroe County "must first consider their larger economic development vision and goals."

Monroe Co wages are 9% below the remainder of Florida (2007) or \$35,620 and 46% of workforce in Accommodation/Food, Retail, Arts/Entertainment/Recreation, the "bottom of the wage scale", and this is seen to be the future growth sector of our econ

The recent demographic shifts are significant. 14% loss in 20-54 working age group, 15% increase in 55 and over. "The incoming retirees are more affluent than the younger population groups that have relocated.... U.S Census data that shows a 23% increase in Monroe County's median household income since 2000 and a 6% increase in per capita income" twice that of Miami, Broward and Palm Beach

XII. City of Key West Worker Satisfaction Survey. Karen Larson (December, 2007).

Karen Larson and Jessica Bennett (cited in Larson) declared in this worker satisfaction survey that 79-89% of those who worked in Key West (regardless of where they lived) were "housing cost burdened". As reported by Larson, the top concerns workers had for their own quality of life were inadequate salary (4.78 on a 5-point scale) and the personal cost of health care (4.64). (Note: the latter was tied -4.64--with the quality of life concern "cleanliness" of the city).

Overall ranking of the importance of issues to workers: Summary

- 1) affordability of living in Key West
- 2) upscale development and overdevelopment are changing the traditional character and culture of the island ; 75% perceived that upscale development was strongest threat to culture of KW. It is to our detriment to become less unique: one characterized the trend as "anywhere USA"
- 3) cleanliness of city streets, parks, beaches and water, and the environment in general; utilization of public spaces by the homeless.
- 4) local government, perceived to be overly responsive to development concerns and nonresponsive to the needs of locals; growing social polarization between the privileged

and the struggling. Across administrations those in office more concerned with the rich than the workers; distrust of city government

Larson's conclusions: What is needed: 1) Leadership from government in developing a comprehensive plan for concerns facing the city and 2) mobilization of citizens to build community cohesion and pride—involve schools, churches, jail inmates, others can participate through donations or other support Community identity built around common cause”

XIII. Duval Street City Summit (January, 2008) and Duval Committee (2008-).

The Mayor and a Commissioner called a city-wide summit to discuss the future of Duval. An estimated 200 residents participated in the discussions and subsequently a Duval Street Committee (volunteer, not Commission appointed) began work on the major topics brought up at the summit. The following represent the summit topics; the issue rankings were done by 17 persons on the committee (two or more items combined by the Strategic Planning Committee—within 5% of each other)

1. Trash can overflow
2. Security
2. Key West as an “ECO” Destination
4. Litter, Dirty Sidewalks and Recycling
4. Inviting Place for Locals
4. Vagrancy
7. Pornography, Drug Paraphernalia
8. Shade trees and beautification (combined by SPC)
9. Visual appearance: street lamps, benches, signs, public transportation on Duval and from Duval to other parts of the Island
10. HARC enforcement and Longer Stays for Cruise Ships

All above received 50% or more “Extremely important” or “Important” responses. Other items discussed at the summit but with lower ratings by the committee: bar-restaurant music (noise) motorcycle noise, lighting, open container enforcement, greeters for visitors, pedestrian mall, special tax on Duval for Duval, computer kiosks, scooter noise, auto congestion

XIV. City of Key West Sustainability Program: A Plan for the Environmental Stewardship of Key West (March, 2008).

The Sustainability Advisory Board has a broad reach, embracing, as the Plan indicates, scientific as well as quality of life environmental concerns. More specifically, they see their reach as including: Community Enhancement (e.g., safe sidewalks, neighborhood organizations); Environmental Management (e.g., parks, beaches, habitats, T-shirt shop windows); Infrastructure (e.g. storm-water project, Truman Waterfront Development); Mobility (bicycle, pedestrian)

XV. Arts and Economic Prosperity: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in Monroe County, FL Published by Americans for the Arts (2008).

The data provided by this report does not list direct expenditures for art purchases, but does estimate art and cultural “event-related expenditures” at \$67.9M. This includes indirect expenditures such as hotel and food. It is not clear that this is totally comparable to the NOAA estimate of the total Monroe County “total impact expenditures”, but if it is a reasonable approximation, arts and culture, including indirect (multiplier), would account for some 22% of the Monroe County economy. According to this study, 58% of this expenditure is from residents and 42% from non-residents.

XVI. Living Room Conversations (May, 2009).

December of 2008 through May of 2009, Commissioner Johnston held a series of “Living Room Conversations” in small groups, totaling 57 Key West residents of Key West. (not a random selection)

Question: “What do you love about Key West?”

- We are a caring community
- We have a great diversity of people and thinking
- We are open to difference
- We are “just enough” weird, quirky and funky
- We have a wonderful sense of community
- We are creative and energetic
- We think that being interesting is more important than wearing fancy suits
- We easily mix across socio-economic and age differences
- We have great weather and spectacular natural beauty
- We are small and compact island that is great for walking/bicycling
- We have important and attractive historical architecture

Question: “What are your concerns?”

- We need to clean up our streets and “treat our island with more respect”
- Our cost of living may require us to “establish a living wage” and consider a “rent stabilization program” or other affordable rent initiatives
- We should reflect on tourism, which is an important source of revenue, but not a plus when it threatens our environment and “defines our very character”
- Consider how to better include persons with second homes who, though they contribute to taxes, also absorb housing stock and too often don’t integrate themselves into our community. They want the amenities, but “fine restaurants hotels and the arts cannot survive on a three-month season”
- Look again at the homeless who take advantage of “our soul as a community... they activate our sympathy” but give little back. “We love humaneness but it is our undoing”

- Our government can and should be a part of the solution in improving our community and economy, but has over the years created a credibility problem with citizens who complain about “who gets listened to”; “the development folks always get the ear [of city government].” Also, code enforcement is both inconsistent and insufficient.
- City planning receives too little attention with little inclination for “effective strategic planning”, leaving “special interests to hijack citizen consensus”
- We must work on what unites us; there is too often a cultural divide between New Town and Old Town residents
- Our city transportation needs complete rethinking. In the long run, parking has to be resolved through more reliance on public transportation and bicycle and pedestrian solutions
- Health care in Key West may be helped through federal action and maybe now is the opportunity to plan for the long term for our health care system
- Higgs Beach will need our constant care, support and attention
- The Truman Waterfront development seems all but intractable; we need to learn the issues as they appear now
- The ocean pollution and our deteriorating reefs are serious deterrents to Key West as an inviting place to live or visit
- What if... A) Cuba opens up? B) the military in Key West were to be substantially reduced?

XVII. City of Key West Climate Action Plan (October 2009).

The Climate Action Plan was written with the assistance of dozens of individuals and organizations in Key West. Groups were concerned with everything from solid waste to trees and water management to bicycle and pedestrian action groups. They cite impacts of sea level rise on Key West and important elements of a sustainability program.

XVIII. Linking the Economy and Environment of the Florida Keys/Key West. National Oceanic and Atmospheric Administration, 2007-2008 (Published December, 2009-October 2010).

This is a large study, but one set of data that may be of interest and importance concerns the following two lists:

Highly important but low satisfaction items for VISITORS in 2007-2008 in Monroe, including Key West (NOT rank order)

- Opportunity to view manatees, whales, dolphins, sea turtles
- Quality of beaches
- Shoreline access
- Designated swimming/beach areas
- Availability of public restrooms
- Value for price

Highly important but low satisfaction items for RESIDENTS in 2007-2008 in Monroe County, including Key West (NOT rank order)

- Amount of living coral
- Large numbers of fish
- Quality of beaches
- Shoreline access
- Condition of bike paths and sidewalks
- Availability of public restrooms
- Cleanliness of streets and sidewalks
- Uncrowded conditions
- Value for price

Activities of Visitors and Residents, selected from three portions of the NOAA study:

1) Visitor Study: Selected Comparisons

2) Monroe County Resident Recreation: Selected Comparisons

3) Visitor Profiles For Key West Visitors

(The above three charts modified and combined in the chart below)

Activity	2008 Monroe County VISITOR Participation Rate 2008	2008 Monroe County RESIDENT Participation Rate 2008	Key West VISITOR Participation Rate 2008
Snorkeling	22%	35%	15%
SCUBA Diving	5	12	3
Fishing	13	40	7
Viewing	20	33	16
Wildlife- Nature Study			
Beach	28	27	25
Activities (including swimming)			
Sightseeing & Attractions	45	22	60
(Paid & Unpaid)			
Visiting	41	31	55
Museums or Historic Areas			
Cultural	9	32	11
Events (Fairs,			

Concerts,
Plays)

All Camping 2

4

2

XIX. TDC: Visitor Profile Survey: 2008 Annual Report (December 2007-November 2008).

ALL Experiences & Activities Sought, (Monroe County) i.e. expectations for experiences during Keys vacation and activities Note: respondents may answer affirmative to multiple experiences	Percent	Rank 1-13
Relaxation and escape, de-stressing, reconnecting with friends and family	99.5%	1
Scuba	10	13
Fishing	13	12
Soft adventure, e.g. kayaking, snorkeling, wildlife, beaching	75	5
Culture & history, e.g. museums, historic architecture, cultural cuisine	88	2
Fine Arts & Performing Arts, e.g. theatre, art, music, crafts, film	69	8
Sunshine, i.e. warm, sunny, mild weather. A better climate	85	4
New experiences, i.e. to go somewhere new	75	6
Prestige, i.e.. high quality accommodations & tourism product cleanliness	87	3
Safety & Convenience, i.e. safe area, convenient to travel to	74	7
Value, i.e. a good value for the cost of trip. A bargain or special deal	66	9
Family, i.e. lots of things for a family to do, family friendly	20	11
Romance, i.e. romantic location to share with loved one or find new love	41	10

TDC: continued

Recreational activities (Monroe County) Note: respondents may answer affirmative to multiple experiences	Percentage who participated	Activity Rank
Diving	14%	10
Snorkeling	36	8
Fishing	17	9
Viewing wildlife	68	5
Boating	45	7
Beach	88	3
Dining out/Nightlife	99	1
Museum/Historic	82	4
Sightseeing/Attractions	97	2
Cultural Events	60	6
Wedding/Commitment	1	11

XX.-Florida Legislative Office of Economic and Demographic Research, Monroe County, 2010.

As presented above, total sales is one way of viewing local economic impact of various "industry" classifications (see "Profile, VI, VII above) but a different way is to look at total salaries by industry. Seen this way, according to our state legislative Office of Economic and Demographic Research (OEDR July 2010), supplemented by Labor Statistic data, "Leisure and Hospitality" pays out 23.5% of total wages, government pays out 23.7% (not including uniformed military, education or health care workers), trade, transportation and utilities 16% and professional and business services 10.4% ...and so on in decreasing amounts.

Literature and Research From Beyond Key West

XXI. Rae, Douglas W. (2003). City Urbanism and Its End. New Haven: Yale University Press.

"The irresistible fact [in this multi-year study of New Haven, Connecticut] ... was that government itself is a weak player in a larger system of power... The interesting questions in local government all ...turn on chains of decisions outside of ...city hall. " Often city hall is all but powerless in the face of economic and demographic forces.

XXII. Florida, Richard and Charlotta Mellander (2007). "There Goes the Neighborhood: How and Why Bohemians, Artists and Gays Affect Regional Housing Values." Available at creativeclass.com.

In a number of cities, rents go up faster than wages, but demand nevertheless continues. The conclusion of several studies: amenities and lifestyle (entertainment, nightlife, culture) attract educated population who make more money who can pay more for housing

XXIII. City of Vancouver, Washington, Strategic Plan (Updated 2008).

XXIV. Florida, Richard (2008). Who's Your City? Basic Books, New York.

115 The author asks: What is our jurisdictional advantage? That is, what are our "unique assets not easily replicated."

138 two factors shape housing values 1) income—correlation to wealth, not to salaries and 2) Bohemian-Gay index (consistently). This is because 1) aesthetic-amenity premium and 2) tolerance or open culture premium

140 "Housing has become disconnected from local wealth-building, local productivity, and local economic development...key determinants of housing prices are income, human capital, and concentrations of bohemian or gay populations, rather than local wages or local occupations. Income, unlike wages, follows the person who owns it."

163 There are five major categories of needs but two top the list: aesthetics and basic services with openness coming in a reasonable close third." (Place and Happiness survey—27,000 respondents)

166 the "beauty premium." "People are drawn to and pay more for that which is more aesthetically pleasing."

168 "...it turns out that the ability to meet people and make friends is one of the most important factors in determining how happy we are with our communities."

169 "There is a growing movement in cities around the world to invest in culture as a way of improving their reputations and spurring economic growth."

176 "With every amount of tolerance extended to these groups (families with children, homeless, gays, seniors, below poverty etc) the overall happiness in the community increased... Many people are drawn to open communities on the assumption that it is in those places where they can most easily be themselves." [emphasis added]

282 today's retirees are looking for something different (Wall Street Journal). "While weather and leisure remain important, retirees are looking for a

community 'where they can make friends and connections quickly, whether it's a small town or a walk-able neighborhood in a big city.'

XXV: Bishop, Bill (2008). The Big Sort: Why the Clustering of Like-Minded America is Tearing Us Apart. Boston: Houghton-Mifflin.

202 "In an economy of extreme niche markets, location itself becomes a commodity."

XXVI: Florida, Richard (2010). The Great Reset. Harper Collins: New York.

86. "The quality of life in the place we live is a key component of our happiness..." according to a Gallup survey, there are 3 key attributes: 1) physical beauty—great open spaces and parks, historic buildings, attention to community aesthetics, 2) ease with which people can meet others, make friends, and plug into social networks. 3) level of diversity, open-mindedness, and acceptance: is there equality of opportunity? Can everyone contribute? These things are organic in nature and require leadership and active engagement of the community. [emphasis added]

120" ...service jobs offer lots of potential for innovation, entrepreneurship, and the upgrading of employment opportunities.... Restaurants, child care services, landscaping companies, new marketing and delivery services for everything from home-cooked meals to in-home technology consultants." [see note p.137]

121 we need "to make service jobs even more innovative, more productive, and higher paying. We cannot stop until they pay better and afford a better way of life than manufacturing jobs did for a couple of previous generations.... People want to learn, to develop new competencies...."

124. "Because the service sector employs so many people and contributes so significantly to the economy, we have little choice but to make these jobs more desirable and more emotionally and financially rewarding."

127. "We can't give up on service jobs, which are among the fastest-growing of all jobs."

129. "No economic system is entirely, or simply, about money. Economic systems reflect the way people choose to live and the way societies see themselves."

161. "60% of Americans ...(2005) said they want to live in walkable communities with shops, restaurants, movie theatres, schools and churches nearby."

XXVII: Alexandria (Virginia) City Council Strategic Plan (Adopted 2004, Revised 2010).