CREATING AN ENDURING SOUTHEAST FLORIDA REGIONAL LEADERSHIP ORGANIZATION

Keeping the Seven50 Vision Alive: Successful Models and Observations

The following report highlights the findings from a study of successful regional leadership models from across the country. The study was prepared by the Southeast Florida/Caribbean District Council of the Urban Land Institute (ULI District Council) for the Seven50 southeast Florida regional visioning initiative spearheaded by the South Florida and Treasure Coast Regional Planning Councils, as well as the Southeast Florida Regional Partnership.

The focus of the study recognizes that great vision plans lead to transformational change and that a requisite for that change is the consistent leadership of champions who are dedicated to keeping the vision alive and supporting it through changes in administrations and civic leadership. Recognizing that, Seven50 integrated into the visioning process the steps to define the features of the organization that over time will have the capacity to promote vision implementation. Those steps included creating the Inclusive Regional Leadership Work Group (led by the ULI District Council) and preparation of this report to learn from the experiences of similar organizations from around the country.

The Inclusive Regional Leadership Work Group is one of six such groups charged with developing the goals, objectives, and actions for key planning areas for the Seven50 vision. The group met as part of individual county meetings in the fall of 2012 and at a regional meeting in April 2013. It also met during the Seven50 summits. The group was asked to identify desirable features of an inclusive regional leadership organization, the types of issues such a group should address, and the type of organization needed to lead

---

Seven50: Seven Counties, 50 Years

Seven50:
- Is a unique collaboration of more than 200 public, private, and civic stakeholders (the Southeast Florida Regional Partnership) who came together to develop a widely shared blueprint for growing a more prosperous and desirable southeast Florida during the next 50 years and beyond.
- Has the following goals:
  - Provide more transportation choices
  - Promote affordable housing opportunities
  - Enhance economic competitiveness
  - Support existing communities
  - Coordinate policies and leverage investment
  - Value communities and neighborhoods
  - Enhance community resilience to the impacts of climate change

---

The Four Sections of the Southeast Florida Regional Leadership Report

- Research Background

- Highlights of Six Selected Regional Leadership Models

- Concluding Observations

- Next Steps

---

implementation of regional solutions in Southeast Florida. The work group members also discussed challenges (housing and transportation choices and economic and environmental issues, for example) to securing opportunities to strengthen communities within their respective counties. The common themes that emerged from the work group meetings are highlighted on the following page.

The remainder of this report is divided into four sections: Research Background, Highlights of Six Selected Regional Leadership Models, Concluding Observations, and Next Steps. More detailed descriptions of the six profiled organizations are contained in Appendix B.

Research Background

The research for this study was conducted in two parts:

- Part One: Investigation by the ULI District Council's Regional Leadership Committee into successful regional leadership models around the country.
- Part Two: Building on the Part One research, selection and examination of six regional leadership models for further research. From that research, prepare a set of desirable features for a regional leadership model for southeast Florida.

Part One

In 2010 the ULI District Council's Regional Leadership Committee invested its time in a two-year research process examining the desirable attributes of a regional leadership organization that could continue after the Seven50 regional visioning initiative to promote vision implementation. The committee's work included two steps:

Step One: Identify and learn more about regional leadership models from across the country because of their potential applicability to southeast Florida. The seven organizations selected represented a range of types, from public to private sector-led: the Minnesota Council of Mayors, Regional Plan Association of New York, Envision Utah, myregion.org, Valley Vision, Chicago Metropolitan Agency for Planning, Vision North Texas, and Quality Growth Alliance.

Features of a Southeast Florida Leadership Organization: Common Themes from the Seven50 Work Groups

- Address a finite number of issues that are identified by consensus and could change over time. The most frequently mentioned issues were those related to transportation (including the high cost of transportation and housing coupled with low wages), economic development, water, environment/climate resiliency, and access to a good education starting at the PreK-level.
- Establish the organization as private-sector led but also include representatives from the public and civic sectors.
- Serve in an advisory (versus regulatory) role and advocate for implementation of the Seven50 vision and its initiatives.
- Fund the organization through voluntary financial contributions and grants from a variety of sources, making the organization financially self-sustaining.
- Make the organization's actions transparent.
- Provide leadership training at the grass roots level and find a home for an ongoing leadership development program.

Step Two: Assign each of the models to two committee members to investigate through a combination of literature review and phone interviews. Features of the organizations that they examined included the reasons they were formed and their mission, funding, leadership, and organizational structures (including the roles of the public and private sectors). Committee members also looked at factors important to the organizations' decision-making and best practices: their successes and failures, including what they did to help build regional identity and pride and influence infrastructure decisions. Summaries of the committee's findings can be found at <http://seflorida.uli.org/get-involved/committees-initiatives/regional-impact-committee/more-information>.

Part Two

The second part of the research centered around three steps.

Step One: Review the Part One research and engage in discussions with the ULI District Council's Regional Leadership Committee members (upper right) who conducted it. The focus (as called for in the ULI District Council's Seven50 scope of work) was on identifying the five most successful regional leadership models and critical features to learn more about. Particular attention was given to organizations that were independent without taxing authority, operated in a region with similarities to southeast Florida, demonstrated a strong track record of accomplishments, sustained private and public sector involvement, and provided a trusted forum for collaborative regional thinking and leadership.

Step Two: Finalize the list of the organizations to examine (lower right) and conduct the additional research needed on those organizations. The research combined a review of information about and phone interviews with representatives of each of the selected organizations. While completing that research for the five chosen organizations, an additional one (the Southern California Leadership Council), was selected for further examination.

Step Three: Learn more about the region's experience with three regional leadership organizations: the South Florida Coordinating Council (SFCC), the South Florida Regional Resource Center (SFRRC), and the South Florida Regional Business Alliance (RBA). Described in more detail in Appendix A, the SFCC (1976) and RBA (2002) were created by South Florida business leaders, and the SFRRC was formed in 2000 by four partners from the public, non-profit, and academic sectors. The successes of the three organizations demonstrate the adage that the whole is greater than the sum of the parts. By working together, they were able to accomplish significant changes in the region in the areas of transportation, education, housing, and business attraction.

Members of the ULI District Council's Regional Leadership Committee

- Marc Kopelman, Raymond James & Committee Chair
- Christian M. Cobb, Cobblestone Real Estate Enterprises
- Carla Coleman, ULI SE Florida/Caribbean
- Andrew Duffell, FAU Research & Development Authority
- Terri Echarte, Gibraltar Private Bank & Trust
- Paul Kissinger, EDSA
- Michael Maxwell, Maxwell Partners & Nova SE University
- Jim Murley, South Florida Regional Planning Council
- David Orshefsky, Orshefsky Holdings, Inc.
- Debbie Orshefsky, Greenberg Traurig
- Douette Pryce, Pryce Resources, LLC
- Eric Swanson, South Florida Regional Planning Council
- Silvia E. Vargas, Wallace Roberts & Todd, LLC

Selected Organizations for Additional Research

- Central Florida Partnership, Orlando, Florida, region <www.centralfloridapartnership.org>

- Joint Venture Silicon Valley, Santa Clara and San Mateo, California, region <www.jointventure.org>

- Metropolitan Planning Council, Chicago Illinois, region <www.metroplanning.org>

- Regional Plan Association <www.rpa.org>, New York, New York, region

- Southern California Leadership Council <http://socallc.org>

- Valley Vision, Sacramento, California, region <www.valleyvision.org>

Information about the six selected regional leadership models is broken into the topics shown in the box to the right. That information is available in two forms:

- An at-a-glance summary (below) that compares and contrasts the organizations by the topics to the right.
- Detailed profiles of each organization (Appendix B), also arranged by the topics to the right.

The format is designed to allow Seven50 participants to mix and match attributes from the different models when making decisions about the best organizational template for the southeast Florida region and its guiding regional vision. The original plan to narrow the six organizations down to three was changed because the research demonstrated that no single organization provided an exact model for Southeast Florida. Rather, each of the organizations examined had features that could be adapted for a leadership model for this region.

> **Organization Attributes Examined**
>
> - Regional Characteristics
> - History, Evolution, and Current Focus
> - Structure (board, committees, staff)
> - Funding (funding sources and allocation of funds)
> - Accomplishments and Future Plans
> - Lessons Learned

Regional Characteristics

As shown in more detail in Appendix B (the individual organization profiles), the selected regions vary in size and population.

- Each region includes multiple counties (ranging from four to 31) and municipalities (ranging from 22 to 783), and four contain a large central city that serves as an economic, population, and cultural hub. Joint Venture Silicon Valley does not have a dominant central city, and the Southern Leadership Council is anchored by two major economic centers on its northern and southern ends.
- Two encompass three states (Regional Plan Association [RPA] and Metropolitan Planning Council [MPC], which began with a focus on Chicago/Cook County and expanded its geographic focus as the Chicago metropolitan region extended into neighboring states).
- Joint Venture encompasses the smallest land area (1,854 square miles) and the Southern California Leadership Council the largest (42,330 square miles), followed by the RPA region (12,600 square miles) and MPC region (12,013 square miles).
- The RPA region has the largest population (over 22 million), closely followed by the Southern California region with 21.0 million; Joint Venture and Valley Vision have the smallest (each in the two million range).

History

> *Origins* – All six organizations were created by civic leaders (regional stewards) who were committed to addressing the tough issues that transcended local jurisdictions and sectors and therefore not within

the purview of one organization – what Valley Vision called "the white space on an organizational chart." Their focus was on addressing those issues from a regional, long-term perspective through the power of collective, cross-sector thinking and action. That is true whether the organization was founded in the 1920s and 1930s (Regional Plan Association and Metropolitan Planning Council) or in more recent times (Joint Venture Silicon Valley and Valley Vision in the 1990s and the Central Florida Partnership and Southern California Leadership Council in the 2000s). Driving issues typically included economic competitiveness, transportation, housing, the natural environment (including water resources), and, more recently, climate change and energy.

> *"The issues of 21st century global competition are simply too large and complex – and moving too fast – to be solved one locality at a time. The solutions are at the regional scale, and we compete globally at the regional scale."* Peter Rummell, ULI Florida Summit, 2012

- ➢ *Evolution* – The continued involvement of the region's top civic leaders who came from and could reach and work across and help align the boundaries (the diverse interests and needs) that usually divide has been a mainstay of each organization. As the organizations evolved, a number of common operative features stand out: collaborative, trusted, connecting, informed (start with the facts), entrepreneurial, and inclusive.

  Typical roles include:

  - Providing a common voice on regional issues and public policies and investments critical to their region's economic vitality, job growth, and quality of life.
  - Supplying a safe forum that is trusted by the public and private sectors and where those from different geographies and views can find collaborative solutions to timely and persistent challenges as well as opportunities.
  - Serving as the connector that mobilizes and nurtures partnerships among diverse organizations, sectors, and walks of life and catalyzes innovative actions that are impeded by the way things have always been done.
  - Conducting sound, pioneering research on region-shaping issues that helps others anticipate and prepare for them and make decisions within the context of their long-term, incremental impacts on where the region wants to go.
  - Doing a lot of careful listening through outreach and public engagement that incorporate a diversity of perspectives.

  > *"A Boundary Crosser is a person who connects people across boundary lines that traditionally divide community. They are citizen leaders who extend past their familiar territory, whether that's government, non-profits, business, ethnic groups, religion, or neighborhoods to become community builders."* Sarasota County Openly Plans for Excellence (SCOPE) <www.scopexcel.org/boundary-crosser-award.html>.

- ➢ *Current Focus* – Each organization focuses on the needs of its specific region. However, the following issues are being addressed by all: enhancing economic prosperity (two have initiated programs to streamline permitting), providing greater housing and transportation choice, effectively managing natural assets, and improving outdated infrastructure (including e- and green-). Another issue common

to most of the organizations is climate change, including initiatives to reduce greenhouse gas emissions and promote sustainable energy. Several organizations are also focused on reducing the region's vulnerability to climate change and severe weather and strengthening neighborhoods and centers in support of transit.

Most of the organizations also:

- Host an annual regional convening to report on progress and feature the region; a number also host regional forums (including virtual) on specific topics (CFP's recent education summit and MPC's webinar on addressing suburban poverty are examples).
- Develop and report progress on indicators, either regional ones and/or those embedded in projects.

RPA is the only organization that prepares a regional plan to guide future investments; however, several others operate in regions where vision plans are in place. Central Florida Partnership came out of a regional visioning process sponsored by myregion.org. Valley Vision, the Southern California Leadership Council, and MPC were involved in regional visioning processes sponsored by a regional transportation and land use planning agency.

Structure

The structure of the six organizations is typical of a nonprofit organization. They each have a board of directors and usually have committees that focus on specific topics.

➢ *Board* – Findings include the following:

- Board size is generally large, ranging from 30 (Valley Vision and the Southern California Leadership Council) to 90 (Regional Plan Association), with the average being 40-50 members. For most, a smaller executive committee works on the board's behalf and makes recommendations to it.
- Board members typically come from a variety of sectors (business, academia, nonprofits, and foundations, for example) and professions (e.g., health care, finance, media, development, the law, engineering and design, and technology). They also represent different geographic areas, experiences, and viewpoints.

All but one of the organizations have private sector boards. The exception, Joint Venture Silicon Valley, has four members from governmental organizations on its board and two co-chairs, one from the private sector and the other from the public sector. The two California leadership organizations provide for representation from their respective councils of governments (the Southern California Leadership Council as a board member and Valley Vision as an ex-officio member). The Central Florida Partnership provides for public sector involvement through its Congress for Regional Leadership. Several organizations cross-fertilize through their staff and leadership serving on governmental committees and task forces. Technical resource and advisory boards provide additional expertise and views.

- *Committees* – The types of committees, other than the typical standing ones such as executive and finance, vary by the organization. Examples include committees or councils that focus on:

    - Bringing in broader views and knowledge – Joint Venture's Senior Advisory Council (former board members and community leaders who provide ongoing advice and expertise), the Central Florida Partnership's Leadership Council (composed of regional nonprofit and business leaders who help the board gather insights and data from a wide variety of organizations), and RPA's state committees that communicate issues to the organization.
    - Addressing particular regional issues – CFP's Central Florida Transportation Corridors Task Force and MPC's committees on housing and community development, and regional planning and investments (includes capital).
    - Selecting projects – Valley Vision's Program Committee that helps define new projects based on 22 criteria to ensure that they are an organizational fit.

- *Staff:* All are served by highly qualified and respected staff who take care of the work of the organization. None rely on volunteers alone. In the case of CFP, several of its management team members also serve as executive staff with other regional organizations, thereby gaining greater coordination.

Funding

Funding: The majority of funds generally come from corporate and, to a lesser extent, individual memberships and donations. Other funding sources include foundations, event sponsorships and fees, publication sales, and public sector grants. The majority of funds are used for projects, with operations receiving a smaller share.

- *Source of Funds:* For the majority of organizations, close to 40 percent of their funding comes from corporate and individual memberships and donation. A much smaller percentage (typically less than 15 percent) comes from government (helps maintain independence). Events are another revenue source as are fees for service (a model that Valley Vision emphasizes).

- *Allocation of Funds:* The majority of funds are usually allocated for projects (includes staff time and expenses), with a smaller amount dedicated to administration and membership support. Budgets range from $540,000 (the Southern California Leadership Council) to $4.0 million (the Regional Plan Association) per year.

Accomplishments and Future Plans

- *Accomplishments:* Their successes clearly demonstrate the power of civic-led regional organizations to bring about enduring change that benefits the entire region. Their accomplishments range from groundbreaking and eye-opening research and multi-partner collaborations to realignment of public agencies, educational reform, and hard projects in the areas of transportation, housing, and environmental conservation. A less tangible but essential achievement that serves as the foundation for all other successes is the organization' role in providing a welcoming platform for thoughtful regional

conversations. That requires creating the trusted safe place where the private, public, and nonprofit sectors can come together to find solutions to tough problems that cross issues, sectors, and geographies. As highlighted in the Valley Vision profile, that role is best summed up as the collective impact, a term coined in the winter 2011 issue of the *Stanford Social Innovation Review* <www.ssireview.org/blog/entry/channeling_change_making_collective_impact_work>. The concept of collective impact recognizes that "highly structured collaborative efforts" that provide cross-sector alignment and learning and the capacity to pull together toward common goals are needed to achieve enduring large-scale change.

➢ *Future Plans:* The future direction of the organizations examined underscore the above: they will continue their roles as civic connectors between sectors (public, business, and nonprofit), issues, and geographies. Several see that role to be of increasing importance in a polarized environment. Pioneering research also remains a high priority. Issues on their horizon include strategies for achieving greater governmental efficiencies, financing out-of-date infrastructure in a time of reduced public funding for projects, and growing an innovative and inclusive entrepreneurial economy. Adapting to climate change and reducing energy consumption are two other issues.

Lessons Learned

➢ *Leadership with Staying Power:* Gain and maintain the early and persistent involvement and support of the region's leadership (what one organization called the trailblazers who have the courage to reach across the artificial lines that divide and call for the ideas whose time has come). Turning around large complex regions can take decades or longer; the end game does not happen in the two- or four-year term of many election cycles.

➢ *Trusted Connector:* Earn the reputation as the neutral, independent, and honest broker with the ability to serve as a good connector across interests, geographies, and sectors (public, private, and civic. That requires a lot of relationship building, earning trust, and sharing the credit (part of the infrastructure for regional success). Today's problems cannot be solved by one sector alone.

➢ *Collaborative:* Work through partnerships (not competition) with other organizations, providing that safe place (the platform) where organizations from different sectors come together to have difficult conversations about regional issues and to work toward a common agenda and shared goals. Although it can test the patience of some business leaders, one organization stressed, a lot of consultation can make the difference in gaining lasting support and involvement.

➢ *Independent, Validated Research:* Invest in producing the research that produces trusted results and give regional leaders the opportunity for review and validation. Good data help move aside the excuses that often lead to no action instead of solutions and can also help a region stay two steps ahead of the next big issues.

➢ *Long-Term View Coupled with Short-Term Strategic Actions:* Help the region take a long-term view and make decisions in the context of their larger lasting impact on the evolution of the region. That should be

coupled with shorter-term doable strategic actions that lead to measurable milestones, demonstrate progress toward longer-term goals, and create a sense of momentum. Short-term successes are also important for a new organization that is building the trust and track record needed to endure and make a difference. Strategic also means carefully defining a discrete number of issues to address or initiatives to undertake.

➢ *Metrics:* Develop accepted indicators to measure and document success. That can apply to the work of the organization as a whole and its individual initiatives and the state of the region. Measuring progress enables an organization to monitor and communicate its performance toward achieving strategic goals and better align activities with those goals. Having such an accountability structure also helps build the credibility of an organization, both in its initial years and over time. It is also important to potential funders.

➢ *Continuous Communication and Education:* Invest in effective two-way communication from day one. Each organization emphasizes engaging in a lot of careful listening (not just preaching) to all perspectives and persuasively and consistently telling the story (research and good ideas alone are not enough).

➢ *The Power of Good Idea and the Right Messengers:* None of the organizations has legislative powers. Their power comes through the strength of well-researched sound ideas that have been well vetted and are viewed as coming from a trusted organization with the ability to rise above politics and act in the public interest (what is best for the region).

➢ *Board and Staff:* Invest in retaining highly qualified, respected staff and strong board members. Use board members' time efficiently and effectively and ensure that they see outcomes that benefit the issues they care about.

Concluding Observations

The examination of the models for civic-led regional advocacy organizations highlights a set of commonalities that the organizations credit to their success and also provide a menu for creating such an organization for Southeast Florida. Those success points are summarized below:

Highlights of Successful Organizations

Board of Directors:

Size – Although the size of the board of directors varied, a 40-50-member board coupled with a smaller executive committee that works on the board's behalf and makes recommendations to the board is typical. Committees are generally used to bring in broader views and areas of expertise or to address a particular issue. Sub-regional geographic-based committees (for RPA, state committees) can be used to bring emerging issues to the regional organization and news from the regional organization back to the sub-regional committees (could be counties in single-state region). They can also help identify and nurture future regional leaders. Board members typically come from and bring an understanding of different parts of the region and different issues, viewpoints, and experiences.

Members – Much of the success of each organization hinges on who serves on its board of directors, including its first one. Each organization has benefited from the sustained support and active participation of their respective region's top private sector leaders. They are the regional stewards with the capacity to provide the civic bridge between sectors and transcend the geographic and issue boundaries that can be divisive. By doing so, they help others do the same, creating a continually expanding network of good regional connectors and coalition builders. They also are able to take a holistic, long-term (beyond business and election cycles) view of the region and provide the staying power required to bring about lasting change. The willingness to step out and call for changes in the way things have always been done is also important.

Legal Status: Not-for-profit, charitable, and non-partisan corporation

Roles

A number of distinctive roles stood out as common features of the organizations examined. They include serving as a backbone organization, leading through sound information, being a good strategic communicator, and providing a common regional voice.

Operating as a Backbone Organization: Each organization emphasized the importance of its record as being fair-minded and unbiased with the ability to rise above partisan politics and act in the public interest. They are viewed as honest brokers that provide the neutral table (the safe harbor) where all sectors can go to have thoughtful regional conversations and build the trust and relationships needed to work together toward a common agenda and shared goals. They partner and collaborate, not compete, with other

organizations and provide the glue that binds together diverse organizations from all sectors to work toward common goals. They live in what the Southern California Leadership Council calls the space of a regional connector (referred to by Valley Vision as the white space on an organizational chart).

Leading through Sound Information: A mainstay of each organization involves producing trusted and pioneering research on timely region-shaping issues that can help others anticipate and prepare for them. An important aspect of the research is that it enables informed decisions on issues within the context of their long-term, often incremental impacts on where the region wants to go. (For a Southeast Florida leadership organization, initial goals could include those identified in the Seven50 blueprint. Another form of research is learning from peer organizations in other regions (an information exchange, for example, among the organizations profiled in this report).

Being a Good Strategic Communicator: Investing in communications and continuous education and outreach is another essential role. Effective communication and education involve getting information out about important regional issues and solutions and gathering information through a lot of careful listening to all perspectives in a variety of different ways. Also important are monitoring and documenting progress through metrics and highlighting and celebrating short-term successes that build momentum, credibility, and confidence that achieving longer-term goals is possible. Using all forms of media, hosting events, and producing eye-opening publications are other key ingredients.

Providing a Common Regional Voice: Each of the organizations has been very effective in presenting a unified voice on regional issues and advancing public policies and investments critical to their region's quality of life and economic success. The success of their advocacy is documented in the organizations' long list of accomplishments (outlined in Appendix B). Important to that voice is the heft that comes from a region's top leaders from different geographies, political parties, and perceived interests saying the same thing.

Focus Issues

A critical element of success is being selective and strategic when taking on an issue or project. That is particularly true of an organization with a strong leadership board that has a broad geographic scope and is in a region with a myriad of complex issues along with unique opportunities. For the new organization on the block, the risk is being pulled in too many directions to have a meaningful impact. One way of addressing that is for the board to develop a set of criteria for selecting projects. (The Southern California Leadership Council and Valley Vision are two examples.) The criteria can be vision- or mission-based (e.g., does a particular issue or initiative advance or divert from the organization's framing vision or mission). They could also be outcome-based (for example, is the project fundable and capable of gaining support, and does it offer near-term results that show progress and can be celebrated).

Funding and Staffing

Funding: The majority of funding typically comes from memberships and donations (primarily corporate but also individual). Other sources include foundations and government (some limit the percentage to

maintain independence), events, and publications. Revenues cover a mix of operations, projects (the majority of funds), and communications.

Staffing: Each organization has a highly qualified professional staff that carries out its work. Two ways to augment staff are by working through other organizations and networks (Southern California Leadership Council) or sharing positions with other regional organizations (Central Florida Partnership). Another approach is to initiate projects with an exit strategy in place (Joint Venture Silicon Valley and Valley Vision). Each gets an initiative up and running and with strong support and ongoing capacity, either on its own or through an existing organization.

Next Steps

The ULI District Council prepared this report as a menu of observations that the Seven50 Executive Committee can use in its discussions of the features for a Southeast Florida civic leadership organization with the long-term capacity to effectively promote the implementation priorities of the Seven50 blueprint. The Council anticipates that the Executive Committee will wish to use this report as a tool in recruiting leadership to form such an inclusive leadership organization for this region, understanding that the final attributes of any such organization will be determined by those who form it. This report outlines the attributes that appear to have been most effective in the long-term success of the identified national models.

Logical next steps include:

- The Seven50 Executive Committee accepting this draft report as a basis for beginning broader discussions with the private, civic, and public sector communities about the formation of such an entity in Southeast Florida.
- The Seven50 Executive Committee in partnership with other interested parties identifying the potential leadership of such an organization (its founding board). That could include the leaders of existing organizations in the region as well as other interested persons. Small group discussions would be held in the fall to flesh out leadership and details of the organization.
- Founding board members forming and announcing a regional leadership organization prior to the end of Seven50 grant work, including identifying initial funding sources. A part of the organization's work would be to collaborate with the Treasure Coast and South Florida regional planning councils and others to advocate for implementation of priorities identified in the final Seven50 report. Another priority for the organization would be to support the two regional planning councils in identifying and securing the funding needed to maintain critical Seven50 implementation and communication tools, such as the data warehouse and regional calendar.

This report was prepared by the Southeast Florida/Caribbean District Council of the Urban Land Institute in partnership with Jean Scott.

The Urban Land Institute is a 501(c)(3) nonprofit research and education organization supported by its 30,000 members worldwide. Founded in 1936, the Institute's mission is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. In Southeast Florida, the District Council includes the seven counties under study in the Seven50 Report, and also reaches into the Caribbean.

Jean Scott specializes in building collaborative partnerships among diverse interests, strategic communications, and synthesizing complex planning issues and policies into language that is easy to understand and provides a foundation for action. From 1989-2000 she was the executive director of a regional civic-led organization for the seven-county central Bluegrass region of Kentucky. She also helped Vanderbilt University establish a similar organization for the 11-county Nashville, Tennessee, region.

APPENDIX A: THREE SOUTH FLORIDA REGIONAL COORDINATION MODELS

South Florida Coordinating Council (SFCC)

The Coordinating Council was formed as a regional business leadership organization in late 1976. Its focus was on developing a diversified economy for Palm Beach, Broward, and Miami-Dade counties, with the goal to make South Florida more than a subtropical paradise for second homes and vacationers with a concentration of jobs in lower paying service industries, as described by a former leader of the group.

Accomplishments included hosting numerous regional conferences on timely regional issues, incorporating the Higher Education Consortium, initiating a regional dialogue about the need for transit, and attracting Fortune 500 companies, with an emphasis on electronics. That resulted in South Florida investments by IBM and Motorola. One of the most important accomplishments was the Coordinating Council's success in getting the region's top business leaders meeting together and working toward shared goals. Over time, however, that role diminished as numerous county-based organizations were established that focused on the region's quality of life and economy, each with its own agenda, staff, leadership, and financial support. A lesson learned: Involve all the related organizations in the region, with the result that "the whole is greater than the sum of the parts." (Margaret Kempel, who was the Executive Director of the Coordinating Council and today serves as the Port Everglades Association Executive Director.)

South Florida Regional Resource Center (SFRRC)

The South Florida Regional Resource Center was a partnership between the South Florida Regional Planning Council, the Treasure Coast Regional Planning Council, the Florida Atlantic University Center for Urban and Environmental Solutions, and the Collins Center for Public Policy, Inc. It operated between 2000 and 2005, and was primarily funded by grants from the John D. and Catherine T. MacArthur Foundation. The SFRRC produced well-circulated regional indicator reports on the same seven-county region now the focus of the Seven50 planning process. The SFRRC also organized convenings on regional issues and implemented an annual awards program. The push to form the South Florida Regional Business Alliance came from the work done by the SFRRC.

South Florida Regional Business Alliance (RBA)

The RBA is a not-for-profit, nonpartisan group established in 2002 to bring together business leaders from Palm Beach, Broward, Miami-Dade, and surrounding counties to address common issues facing the South Florida region. Its founding partner organizations included the Broward Workshop, Economic Council of Palm Beach County, and the Greater Miami Chamber of Commerce. Additional participating organizations include the Martin County Economic Council, the South Florida Regional Transportation Authority, and the South Florida and Treasure Coast Regional Planning Councils (SFRPC and TCRPC).

An early RBA focus, and one of the reasons it was founded, was on creating a regional transportation authority that could provide seamless service. That led to one of the RBA's greatest accomplishments: partnering with local and legislative elected leaders, then Governor Jeb Bush, the SFRPC and TCRPC, and

business allies to establish the South Florida Regional Transportation Authority and then secure an ongoing dedicated funding source for Tri-Rail. Other accomplishments include

- Organizing an annual South Florida Regional Business Day in Tallahassee.
- Forming an alliance with the Palm Beach, Broward, and Miami-Dade county school districts to focus on current issues affecting public education.
- Partnering with several organizations to focus on the need for affordable workforce housing, leading to a regional workforce housing assessment and the development of a regional action agenda.
- Working with the economic development organizations of Palm Beach, Broward, and Miami-Dade counties to ensure that the three organizations were not competing for the same jobs and were coordinating their communication on business development issues.

Ingredients that led to the RBA's successes include the importance of limiting the number of issues addressed at one time (that one key issue everyone can rally around) and focusing on issues with a defined time frame (getting legislation approved, for example). Also important are working together as a true team, putting a strategy in place for developing ongoing leadership, and providing dedicated funding for staff (making the organization work needs to be someone's job).

APPENDIX B: SELECTED REGIONAL LEADERSHIP ORGANIZATION PROFILES

Regional Characteristics

- *Number of Cities and Counties:* 86 cities and seven counties

- *Current and Projected Population:* Current, 3.5 million; projected, 7.0 million, 2050

- *Land Area:* approximately 8,000 square miles

- *Form:* Illustrated to the right, the central Florida region centers around the city of Orlando: its economic and population hub.
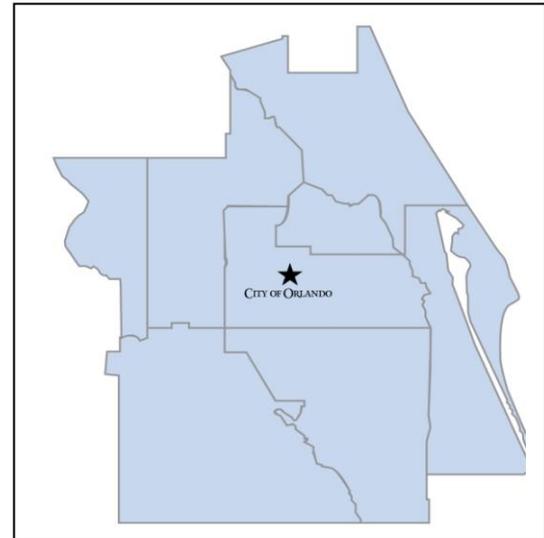
History

- *Origins* – CFP was founded in 2007 by business and civic leaders committed to procuring a better future for the

Central Florida Region

central Florida region and the belief that they had the responsibility to make change happen. They formed CFP to create a place where regional leaders could come together for a conversation about the region's challenges and opportunities. In the beginning, an impartial consultant interviewed 200 CEOs in the region to learn what they viewed as the regional priorities important to their businesses. The resulting list was then refined by CFP's board. Under its direction, each regional priority is guided by one or more of its four lines of business (the four different organizations that work together under the CFP umbrella and help carry out CFP initiatives):

  - Entrepreneurship, Orlando, Inc. (the Orlando Regional Chamber of Commerce)
  - Public policy advocacy, BusinessForce (a regional political action committee)
  - Research and resolve, my region.org (led the How Shall We Grow regional visioning project that concluded in 2007 when CFP was formed)
  - Regional leadership, Leadership Orlando (recruits and encourages emerging and established leaders and educates them on regional issues)

- *Evolution* – Over its last five years, CFP has updated its priorities based on current issues. Its goal is to update its regional priorities every 1,000 days, using a process called Turning the Page to renew priorities and respond to calls for new actions. Recommendations for CFP's next three years will come

in late summer 2013. A board-created Leadership Council help guide the process of discovering and establishing the next regional priorities. CFP's priorities are outlined in *Advancing Our Shared Agenda Regional Priorities for the Central Florida Partnership* <*www.centralfloridapartnership.org/about/regional-priorities*>.

➢ *Current Focus* – CFP's work today centers on four areas: regional transportation, entrepreneurship leadership, public policy advocacy, and research (includes the Central Florida Scorecard, a new tool that can assist leaders in tracking the region's progress on key issues). Much of that work is achieved through collaboration with other organizations. That includes:

- Sponsoring (with 29 other organizations) a regional gathering on moving ideas to results.
- Partnering with five other organizations to establish the Open For Business program that is working to streamline permitting among the seven counties and 86 municipalities that comprise the region. One result is a one-stop website where users can easily access permitting standards for each participating local government.
- Hosting the Super Regional Strategy Team (with the Tampa Bay Partnership), a group of civic leaders who are coordinating across 13 counties in the areas of transportation, state and federal legislation, workforce housing, healthy communities and health care, water, energy resources, and growth management. Through myregion.org the two organizations commissioned a study by the PennDesign Studio to explore the value of operating coast-to-coast as Florida's first Super Region and working together to address common economic, transportation and environmental issues.
- Hosting the June 2013 Central Florida Education Summit with the support of other partners. The summit focused on implementing the Common Core State Standards, a state-led effort coordinated by the National Governors Association Center for Best Practices and the Council of Chief State School Officers. It highlighted the important role the business community must play.
- Convening the Congress for Regional Leaders (with the University of Central Florida) – Created by myregion.org (the organization the led the How Shall We Grow regional visioning project), the Congress is made up of the region's elected leaders (city and county governments and school boards). Its members work to the implement the Regional Growth Vision and provide an ongoing dialogue about important regional issues such as water, transportation, and education.
- Launching (through myregion.org, a CFP line of business, in partnership with the Florida Chamber Foundation) the Central Florida Scorecard that is designed to track regional progress with real data. The pilot program measures 18 key quality of life indicators.

Five principles guide CFP's work: make decisions informed by sound research and data, ensure transparency and early leader involvement, incorporate diversity of perspectives, leverage assets, and soundly execute projects.

Structure

➢ *Board* – CFP's 46-member board is composed of representatives from a variety of fields, including foundations, higher education, and business (from the fields of architecture, the law, engineering, energy, technology and communications, recreation and entertainment, real estate development and

construction, the military, distribution, and financial investments). No public officials serve on the board. CFP uses Leadership Orlando as a source for new leaders.

➤ *Central Florida Partnership Leadership Council* – Composed of regional nonprofit and business leaders who help the board gather insights and data from a wide variety of organizations.

➤ *Committees* – CFP convenes the Central Florida Legislative Delegation and has formed the Central Florida Transportation Corridors Task Force to elevate and persuade business to focus on the important issues of identifying and implementing a multi-modal transportation improvement program for the region through leadership, coalition building, and advocacy.

➤ *Staff* – CFP has a six-member management team (two also serve as executive staff with other regional organizations, thereby gaining greater coordination), two-member sales team, eight-member project team, and three-member support team.

Funding

➤ *Source of Funds* – CFP's funding ($2.6 million in 2011) comes from investors, sponsors, grants, and transaction fees from the public, private, and independent sectors. CFP has a fair share formula for corporate donors.

➤ *Allocation of Funds* – Funds are used for expenses related to administration, advertising and promotion, events and meetings, and publications.

Accomplishments and Future Plans

➤ *Accomplishments:* CFP accomplishments through its many partnerships include:

- An innovative tool that illustrates which regional issues have the greatest impact on the others (was revealed at the 2012 gathering on moving ideas to results).
- Two super region economic summits (in 2009 and 2010) that involved Tampa Bay and Orlando area business and civic leaders.
- Amway Center, one of three community venues that are part of Orlando's Downtown revitalization known as Project Hometown.
- SunRail, 61 miles of commuter rail service that will serve as the cornerstone of a regional multi-modal transportation system for Central Florida.
- University of Central Florida College of Medicine, championed by myregion.org, a CFP line of business.

CFP also supported and provided education and advocacy for High Speed Rail for Florida, a collaboration with the Tampa Bay Partnership and Connect Us (a statewide grassroots effort designed to support High-Speed Rail for Florida). Although that effort was rejected by Governor Rick Scott, CFP continues to advocate for mass transit infrastructure.

➤ *Future Plans* – CFP's future plans will be determined by the result of its Turning the Page effort (described earlier).

Lessons Learned

CFP's principal lesson learned: Building relationships and trust should be the primary priority. Without a safe place where leaders can go, it very hard to have difficult conversations on regional issues, break down artificial boundaries, and cooperate and collaborate. Having such a safe place means that leaders can leave their egos at the door and work unselfishly toward what is best for the region. Having those conversations, CFP observed, is facilitated by the geography of Central Florida and the central location of Orlando.

Regional Characteristics

- *Number of Cities and Counties:* Four counties and 40 cities and towns

- *Current and Projected Population:* 2.9 million projected through 2012

- *Land Area:* 1,854 square miles

- *Form:* The linear Silicon Valley region is located between San Francisco to the north and San Jose to the south.

Joint Venture Silicon Valley Region

History

- *Origins* – Joint Venture Silicon Valley's beginnings go back to 1993 when, for the first time, the semiconductor industry found itself facing competitive challenges from other rising tech regions in the U.S. and abroad. Business leaders recognized that in order to remain competitive they needed to be as creative in the civic realm as they had been in the entrepreneurial world. The result was Joint Venture, what its founders viewed as an experiment in regional thought and action on issues that do not respect city, county, or state lines.

- *Evolution* – Joint Venture has maintained its focus on preserving the region's standing as one of the world's best places for innovation and entrepreneurship. It has done that by providing a neutral forum for collaborative thinking and involving established and emerging public and private leadership in assessing and reaching consensus on regional challenges and working together to effectively respond to those challenges.

- Current Focus – Today Joint Venture continues its focus on bringing together public and private leaders to analyze, spotlight, and strategically act on issues affecting the region's economy and quality of life. When considering new initiatives, staff members first evaluate their scope, objectives, impacts, and funding sources. Specific focus areas include a:

  - Public Sector Climate Task Force (every city, town, and county) and Climate Prosperity (focused on growing clean, green businesses).
  - One-stop concierge service for businesses and organizations to connect with the region's economic development professionals using <www.siliconvalleyonline.org>, the website of the Silicon Valley Economic Development Alliance that meets under the auspices of Joint Venture.

- Joint Venture-led public-private collaboration composed of the wireless industry, cities, businesses, and residents that mounted a campaign to improve the wireless infrastructure in Silicon Valley and eliminate dead spots.
- Project aimed at transforming the region's main street, El Camino Real, into a Grand Boulevard that promotes walking and transit and an improved quality of life. The initiative's task force, staffed and led by Joint Venture, includes every city on El Camino between San Jose and San Francisco, housing advocates, the development community, transit providers, and the regional and state agencies that have responsibility for the street.

Joint Venture also produces a wide variety of research publications. That includes the annual *Silicon Valley Index (*a joint publication with the Silicon Valley Community Foundation and published on its own website, <www.siliconvalleyindex.org>) that measures the strength of the region's economy and the health of its communities. The *Index* is released each year at the State of the Valley Conference, a town meeting that brings together some 1,500 participants for a dialogue and discussion about the Valley's challenges and opportunities and celebrates the region through displays and events.

Structure

➢ *Board* – Joint Venture's 50-member Board of Directors includes senior-level representatives from business, academia, labor and workforce organizations, foundations, and local and regional government (four of the current members). It has two co-chairs, one from the private sector and the other from the public sector.

➢ *Senior Advisory Council* – The council is composed of a group of former board members and Silicon Valley leaders who provide ongoing guidance to the organization, offering their counsel and expertise in business, government, and academia to Joint Venture's officers and staff.

➢ *Staff* – Joint Venture is run by a staff that includes a President and Chief Executive Officer, two Vice Presidents, four project executive directors, and a Benest Fellow (described below).

➢ *Leadership Preparation* – Joint Venture recruits emerging leaders from Silicon Valley to work on initiatives via on-the-job training by involvement in its programs. It also fosters the Benest Fellowship program (named for a former Palo Alto city manager who served on Joint Venture's board and was a proponent of regionalism) for college students or recent graduates interested in regional economic development or public policy careers.

Funding

➢ *Source of Funds* – Of Joint Venture's $1.3 million 2013 annual budget, 40 percent comes from government, 3 percent from foundations, and 57 percent comes from corporate memberships and donations.

➢ *Allocation of Funds* – Funds are divided into the following categories: 50 percent administration (includes administrative costs for events and projects), 40 percent fundraising and membership (called investors), and 10 percent projects.

*Accomplishments an*d *F*uture **Plans**

➢ *Accompl**i**shments* –

- Publication since 1995 of the nationally recognized *Silicon Valley Index*.
- A three-year Disaster Preparedness Initiative that concluded with its transfer to a freestanding National Disaster Resiliency, the first such collaborative facility on the West Coast.
- The launching of a K-12 public education initiative that focused on teaching and led to the Silicon Valley Alliance for Teaching that developed a range of programs addressing challenges facing K-12 public school teachers.
- A Regional Workforce Initiative that developed workforce solutions to address the constantly shifting demand for new skills and abilities among employers and developed qualified individuals to replace retiring workers. One result was an outcome-based Workforce Action Plan.
- The 2011 publication with Accenture of the report, *Regional Action Plan – Cross-Jurisdiction Collaboration: New Models for State, Regional, and Local Governments*, that outlines new models for local governments to pool resources and purchase supplies and services.

➢ *Future Plans* – High priority initiatives include the Smart Energy Enterprise Development Zone, newly created Silicon Valley Institute for Regional Studies, and building a framework for regional governing.

Lessons Learned

Joint Venture attributes its success to a number of factors, including its:

➢ Public-private collaborative approach to all projects and early and continued involvement of strong public and private leaders and investors.

➢ Focus on sound research and communication (research and good ideas alone are not enough; telling the story is also key).

➢ Beginning all initiatives with a specific mission and clear goals and concluding them when the goals are achieved or, after Joint Venture incubation, transferring them to other partner organizations for long-term administration. For all projects, successful or not, Joint Venture analyzes and reports on what happened, both the accomplishments and the shortcomings.

Regional Characteristics

- *Number of Cities and Counties:* 18 counties and approximately 469 municipalities in three states (Illinois, Indiana, and Wisconsin)

- *Current and Projected Population:* current, 11.4 million in 2010; projected, more than 13 million people in 2040

- *Land Area:* 12,013 square miles

- *Form:* Depicted to the right, the region is skirts Lake Michigan, anchored by Milwaukee to the north and Gary to the south, with Chicago as its hub.

Metropolitan Planning Council Region
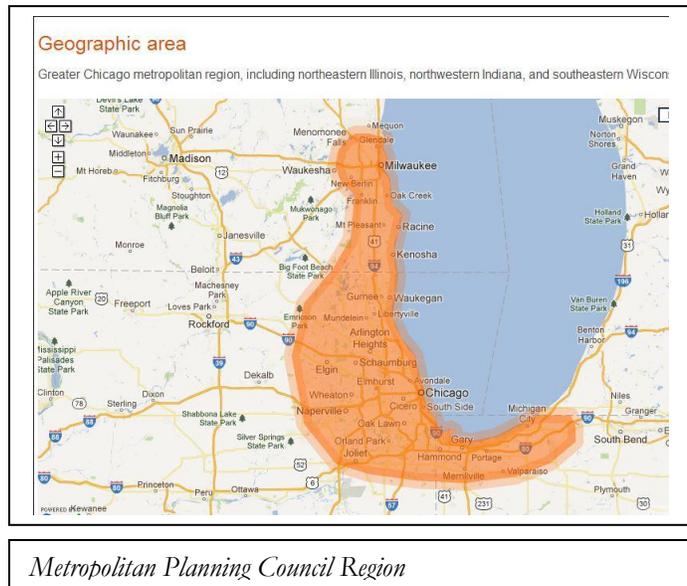
History

- *Origins* – MPC is an independent, nonprofit, nonpartisan organization dedicated to shaping a more sustainable and prosperous greater Chicago region. Its roots go back to 1934 when a group of concerned citizens founded the Metropolitan Housing Council (MHC). Its focus was on improving the city's housing stock and slums.

- *Evolution* – In the post-war 1940s, MHC took on a broader mission – to make recommendations for managing the anticipated surge in metropolitan expansion, an action that led to a name change, the Metropolitan Housing and Planning Council (MHPC). Throughout the 1950s and 1960s MHPC continued its dual focus on housing and regional planning. It also assumed two new roles: one as the liaison organization that could form partnerships among the region's many stakeholders and catalyze broad regional initiatives and the other as an authority on transportation planning. The regional planning focus was reflected in the 1985 name change to the Metropolitan Planning Council. Since the high growth years of the 1990s, MPC's geographic focus has expanded to include the tri-state mega region.

- *Current Focus* – During the current tough economic times, MPC is focusing on developing and promoting the practical strategies that drive regional growth and support vibrant, livable neighborhoods (those with quality homes, transportation options, strong local economies, and well-managed natural assets). Other project areas include identifying innovative financing mechanisms for transportation, encouraging cross-border collaboration to enhance the region's economic competiveness, promoting placemaking through creating and maintaining vibrant public spaces, and

better managing water supplies including problems with stormwater runoff (made worse by more frequent bad storms and heavy rains). The focus is on making stormwater a resource rather than a nuisance through the use of green infrastructure. MPC achieves its goals through research, advocacy, and demonstration projects that advance innovative, pragmatic solutions to the region's most vexing challenges. MPC continues its role as a trusted partner to governments, businesses, and communities as they work to address the region's needs (articulated in MPC's annual agenda, called the Plan for Prosperity). The agenda changes as the region's needs change.

Structure

➢ *Board of Governors* – Its 56-member board is composed of representatives primarily from the business community who also represent civic and community organizations, including foundations and community and faith-based organizations, labor, and higher education. Nine board members and the MPC president serve on an executive committee. A nominating committee helps ensure that the board is diverse and includes representatives from different sectors, political viewpoints, and geographic areas. It also draws from regional leadership training programs to bring in emerging leaders. No public officials serve on the board, although they are regularly engaged in MPC's work and MPC's staff and board serve on local government boards and committees.

➢ *Committees* – Three committees: Housing and Community Development (housing affordability and equitable development), Sensible Growth (land use and the environment), and Regional Planning and Investments (includes capital). Committees usually have about 15 members who represent business, civic, community, and government leaders.

➢ *Resource Board* – Appointed by the chair of the Board of Governors, the Resource Board (currently with 24 members) brings specialized expertise on issues, geographic areas, contacts, and other resources important to the success of MPC's initiatives. In recent years, the group has helped plan MPC events, including an annual cross-committee forum (where volunteers from different committees get together to discuss cross-cutting issues).

➢ *Executive Advisors and Leadership Circle* – Executive Advisors are regional CEOs who lend their names in support of MPC's work and make an annual commitment of at least $15,000. The Leadership Circle is a society that gives members access to exclusive networking events and briefings that feature interesting speakers on timely topics.

➢ *Staff* – MPC is run by a staff of 23. Its leadership includes a President, Executive Vice President, and senior positions in the areas of housing and community development, transportation, water management, communications, development and government relations.

Funding

➢ *Source of Funds* – Of its $3.389 million annual budget, 3 percent comes from government, 39 percent from foundations, 7 percent from investments, 7 percent from individual memberships and donations,

and 44 percent comes from corporate memberships and donations. Individual and corporate donor amounts range from $75 to the $250,000 and up category.

➢ *Allocation of Funds* – Funds are divided into the following categories: 6 percent administration, 12 percent fundraising, and 82 percent projects (includes funding for project operations and related outreach and communications).

Accomplishments and Future Plans

➢ *Accomplishments* – MPC's accomplishments track its evolution from a more housing-focused organization to one engaged in the full range of regional planning issues. Housing accomplishments include passage of the Illinois Housing Act, creation of Chicago's first Housing Authority, revival of an almost-dormant City Plan Commission, approval of Chicago's first housing code and Urban Community Conservation Act, and publication of a greatly used regional housing supply and opportunities study. MPC's numerous regional planning accomplishments include:

- Creation in the 1950s of the Northeastern Illinois Planning Commission (NIPC) and Chicago Area Transportation Study (CATS) Policy Committee that developed the region's first comprehensive long-term transportation plan.
- Publication in 1964 of the landmark *Pattern for a Greater Chicago* that contained recommendations for healthy regional growth.
- Creation in the 1990s of the Regional Transportation Authority and launching what became known as the Regional Action Agenda (promotes regional vitality through public and private sector cooperation) and Business Leaders for Transportation (a joint initiative with the Chicagoland Chamber of Commerce).
- Creation in 2005, following 30 years of MPC advocacy, of the region's first comprehensive planning entity (the Regional Planning Board, now called the Chicago Metropolitan Agency for Planning: CMAP) that consolidated NIPC and CATS to better integrate land use and transportation. The state legislation creating CMAP described it as a "unit of government whose purpose it is to effectively address the development and transportation challenges in the northeastern Illinois region." As required by state and federal law, CMAP developed GO TO 2040, the metropolitan region's comprehensive plan <www.cmap.illinois.gov/2040>, to help the seven counties and 284 communities of northeastern Illinois implement strategies that address transportation, housing, economic development, open space, the environment, and other quality of life issues.

➢ *Future Plans* – Increased regional problems (crumbling infrastructure, more suburban residents living in poverty, and foreclosures continuing to destabilize neighborhoods), coupled with reduced public funding for projects, have led to MPC's next big focus: expanding its Innovative Financing Initiative from research to implementation and helping governments collaborate to achieve more effective, efficient development (an initiative that has already led to three collaborations). A next step is to prepare a catalog of the government entities in the region and their assets, such as bonding authority, eminent domain, legislative authority, etc., that can advance development. MPC will use the catalog to identify several regionally significant demonstration projects to advance the concept.

Lessons Learned

MPC advice for success includes:

➢ Establish trusting partnerships with strong, respected civic leaders (trailblazers) from a variety of sectors (community, government and business) who do not just represent the city center but the entire region. Also involve those not quite ready for leadership.

➢ Identify the most pressing regional needs. MPC uses existing regional plans (such as the one developed by CMAP and World Business Chicago's *Plan for Economic Growth and Jobs*) to identify regional needs and goals. Also practice staying two steps ahead. That means pointing the region to the next set of issues. MPC does that through research and looking at other peer regions.

➢ Take a long-term view and be persistent in achieving the big goals (look at the 30 years to get CMAP created).

➢ Cultivate volunteers including those on the board. That means using their time efficiently and effectively and ensuring that they see outcomes that benefit the issues they care about.

➢ Invest in sound research that produces trusted results. Also invest in good communications – persuasively and consistently telling the story is a lot of the battle.

➢ Be a good connector (silo crosser) between organizations, issues, and people and listener. (Although it can wear on the patience of some business leaders, a lot of consultation makes a big difference in gaining lasting support and involvement.) That also means not preaching from above but reaching people where they are.

➢ Collaborate a lot – partnerships and shared credit lead to the big successes. Each partner brings another network to engage. To make that work, invest in the staff who help make those partnerships happen.

Regional Characteristics

Number of Cities and Counties: 31 counties and 783 municipalities in three states (New York, New Jersey, Connecticut)

Current and Projected Population and Density: Current, 2010, 22.2 million; projected, 26.4 million in 2040

Land Area: Approximately 12,600 square miles

Form: Depicted in the image to the right, RPA's planning region is in the shape of a crescent, with its urban core at the heart of the crescent.

Regional Plan Association Region

History

➢ *Origins* – RPA is the oldest and one of the most influential of the independent private-sector leadership regional planning research and advocacy organizations. Its roots go back to 1922 when some of New York's most prominent business and professional leaders recognized the need to plan for the growth of the region, defined for the first time as also including New Jersey and Connecticut In 1929 the region's first long-range master plan, A Regional Plan of New York and its Environ, was published; RPA was established to see that the plan was implemented and develop new ones as needed.

➢ *Evolution* – Preparing and implementing long-range regional plans (what the region should do next) and policies to guide the region's growth continue to be the cornerstone of RPA's work. However, it has also become a leader in pioneering research on timely regional issues (those that are region-shaping in their influence) and spearheads advocacy campaigns that support its goals. The most recent example is an initiative to enhance Penn Station.

➢ *Current Focus* – RPA continues its work to improve the region's prosperity, sustainability, and quality of life. It is currently developing the Fourth Regional Plan and sponsors an annual assembly that brings together leaders and professionals from government, business, civic groups, and the media to discuss the region's most pressing issues. The new regional plan and 2013 assembly center on the three urgent challenges that could derail the region's progress: climate change, fiscal uncertainty, and declining economic opportunity, particularly for the region's increasing numbers of immigrants and minorities.

Project areas include:

- Providing community design assistance and promoting economic and community development that improves the region's long-term prosperity and social equity
- Advancing energy infrastructure that is reliable, affordable and resilient and strategies to cut greenhouse-gas emissions and reduce the region's vulnerability to climate change and severe weather.
- Protecting and enhancing the region's natural environment, including its landscapes, open spaces, and water bodies.
- Promoting varied and affordable housing opportunities near transit and advocating for innovative approaches to transportation that will improve the ability of residents and visitors to travel to and within the region.

Structure

➢ *Board* – RPA's 90-member board is composed of representatives from a variety of fields, including foundations, higher education, health care, and business. Business sectors represented include architecture, planning, the law, engineering, energy, utilities, and financial planning and investments. Fifteen board members comprise an executive committee. No public officials serve on the board, although former board members have gone on to serve in public office and former public officials have served on RPA's board. The intent is a board that can take a long-term, balanced view and is not constrained by term limits and jurisdictional silos.

➢ *Committees* – Three state committees composed of business leaders, experts, and opinion makers provide strategic advice to RPA's three state offices. The state offices, which are guided by state committees, help ensure an on-the-ground presence in New Jersey, Connecticut, and New York City and play a critical role in research, planning, and advocacy for projects in their respective areas. RPA looks to its state committees as a source of new leadership.

➢ *Staff* – RPA is run by a staff of approximately 30. Its leadership includes a President, Executive Director, and three Vice Presidents (for research and development, environmental and energy programs, and strategic initiatives). Each state office has a director.

Funding

➢ *Source of Funds* – Of RPA's $4.0 million 2013 annual budget, 38 percent (used for organizational support) comes from subscriptions (memberships) and 12 percent from the annual regional assembly underwriting and registration. The remaining funds, which are used for project support, come from the following sources: 38 percent foundations and 12 percent government grants. RPA limits the percentage of the funds it receives from governmental entities as part of maintaining its independence.

➢ *Allocation of Funds* – Funds are divided into the following categories: 70 percent for organizational expenses (the major portion is for personnel) and 30 percent for projects.

Accomplishments and Future Plans

➢ *Accomplishments* – RPA's landmark regional plans and some of the region's most significant public works, economic development, and open space projects have their roots in RPA ideas and initiatives and illustrate the power of a private-sector led organization to shape a region.

Regional Plans: The first regional plan (1929) provided the blueprint for the current transportation and open space networks, and its second plan (1968) was instrumental in restoring the region's deteriorated mass transit system, preserving threatened natural resources, and revitalizing urban centers. Its third plan (1996), entitled A Region at Risk, warned that success could no longer be defined in terms of economic growth without accounting for social and environmental costs and benefits. Plan successes include:

- Greening and revitalizing parks and streetscapes, especially the largely underutilized urban waterfronts of the New York-New Jersey Harbor and the Long Island Sound, and permanently conserving open space. Two examples include protecting 100,000 acres important to Long Island's groundwater supply and helping ensure the creation of a 230-acre park as part of a campaign to protect and improve public access to the Long Island Sound.
- Improving the ability to get around the region by strengthening the transportation network through numerous transit expansion projects that have been completed or are under construction.
- Channeling growth to 11 regional centers. That included an expansion of the underutilized west Midtown's business district and RPA's opposition to building a sports and convention center using air rights over the site of the Hudson Yards.

Sampling of Enduring Project Initiatives: RPA efforts led to the location of the George Washington Bridge, the building of the Henry Hudson and Palisades parkways, the creation of NJ Transit and the Hudson-Bergen light rail, the oversight of the region's three major airports under the Port Authority, and the relocation of the region's major port operations outside of Manhattan. RPA also successfully spearheaded efforts to revitalize the Gateway National Recreation Area, the Palisades, Governors Island, and greenways along the Brooklyn Waterfront and Jamaica Bay.

➢ *Future Plans* – RPA's Fourth Regional Plan will shape its future work to prepare for the next four million residents and ensure that the region remains globally competitive. That includes a new initiative with the World Bank Institute's Global Learning lab program that is using RPA's Fourth Regional Plan as a laboratory for other emerging global cities beginning work on their own metropolitan strategic plans. RPA also sees its role as a civic leadership organization that is able to create effective partnerships with the public and business sectors of continuing relevance. The places that succeed in the future, RPA notes, will be those that have committed civic leadership.

Lessons Learned
RPA's success over the past 80 years can be credited to numerous factors, including the fact that it:

➢ Has benefited from the sustained support and participation of the region's top private sector civic leaders – regional stewards who represent different sectors and perspectives and networks and can

provide the civic bridge between the business and governmental sectors and take a long-term view (beyond elected and business cycles).

➢ Has established a strong track record as a fair-minded, unbiased organization that serves as a neutral source of well-researched, independent information and is seen as having the ability to rise above partisan politics and act in the public interest.

➢ Partners and collaborates, rather than competes, with other organizations, and provides a safe place where those with diverse views can come together and work on shared issues, thereby accomplishing more for all. An example is the 2010 $3.5 million Sustainable Communities Initiative grant award from the U.S. Department of Housing and Urban Development. Underscoring its value as a highly respected neutral organization, RPA was asked to be the lead applicant for an unprecedented bi-state collaboration of nine cities, two counties, and six regional planning organizations in New York City, coastal Connecticut, Long Island, and the lower Hudson Valley. A central goal is to link strategies on a metropolitan scale, including developing mixed-income housing, employment, and infrastructure in locations connected by the region's two commuter rail networks (one of the three legs of RPA's Third Regional Plan).

➢ Invests in preparing and working to implement ambitious long-range plans for the region at a critical time in the region's development. The plans have enabled RPA to anticipate and prepare for the next big issues and led to major changes in transportation, community development, environmental protection, and social welfare. Turning around large complex metropolitan regions like New York can take decades or longer, RPA stressed. That means a civic leadership organization that is persistent and has staying power and the courage to call for the ideas whose time has come.

➢ Balances its long-term view with near-term successes in each part of the region that maintain momentum and interest and demonstrate progress and works with the public sector, using its resources and leadership to advance public investments.

➢ Retains highly qualified, respected staff and invests in communication and education that includes celebrating and documenting successes.

Regional Characteristics

- *Number of Cities and Counties:* 209 cities and seven counties

- *Current and Projected Population:* Current, 21.0 million, 2012; projected, 26.0 million, 2040

- *Land Area:* 42,330 square miles

- *Form:* The linear region stretches from the Mexican border in the south to Ventura County in the north and is anchored at either end by two major metropolitan areas (San Diego and Los Angeles, respectively). The Pacific Ocean forms the region's western border and Arizona and Nevada provide its eastern border.

Southern California Region

History

- O*rigins* – The Leadership Council was founded in 2005 by the Los Angeles County Economic Development Corporation and business and community leaders as a non-partisan, non-profit, business-led public policy partnership of business and community leaders. Its founders recognized the prime importance of filling a gap: an organization that could bring together top leaders who can view the region in its entirety and determine how to best manage issues from a regional perspective. Their goal was to capture the collective strength of the region to ensure its economic vitality and quality of life.

- *Evolution* – Since its creation, the Leadership Council has exerted strong leadership on issues of regional significance and provided a common voice on major public policies critical to the region's economic vitality, job growth, and quality of life. It has done that by:

  - Ensuring strong leadership (the core of the organization). That includes the involvement of presidents and CEOs of top Southern California companies and four former governors who helped found the organization and are considered its public sector deans. Three of the governors are still actively involved (one as co-chair of the board) and one is now off the board because he was reelected as governor.

- Providing a longer-term view (vision) of the region (how it is evolving and its growth and development).
- Uniting business and community leaders from throughout the seven-county region into one organization with the capacity and leadership to align diverse interests and needs around a common vision.
- Partnering with other organizations to accomplish goals. Because of the region's size and its having a number of well-established and successful regional organizations, the Leadership Council works more as a network of networks. In that approach it works with and through other organizations, typically bringing a long-term view and serving as a facilitator, connector, and convener (often of those who would not ordinarily come together and work toward a common goal).

➢ *Current Focus* – The Leadership Council continues its founding focus on shaping public policy in the following six areas that are critical to the region's economic vitality and quality of life:

- Business retention and attraction strategies to retain key jobs and key industries in the region
- Water reliability
- Good movement solutions
- Climate change strategies
- Energy solutions
- Regional Planning

The Leadership Council works closely with its members and regional partners in deciding which issues to address. In order to be considered, an issue must:

- Be important to Southern California and the state and critical to economic development and job creation.
- Offer, when possible, near-term solutions.
- Have the business leadership necessary for success.
- Be fundable.
- Have the ability to gain political support.

Once an issue is included on its agenda, the Leadership Council works to shape public policy through one or all of the following approaches:

- Identifying and developing public policy analysis and solutions
- Organizing efforts to support those policies
- Informing the public debate with its analysis and perspective
- Meeting with opinion leaders
- Investing in and leading implementation efforts to resolve critical issues
- Leading by example

Structure

➤ *Board* – The Leadership Council has a 30-member board that includes two chairs (one a former governor and the other a business executive) and two vice chairs. The board is composed of representatives from throughout the region and from a variety of business fields, including energy, technology, real estate development, transportation, and health. Most board member select an issue on which to focus (some select more than one). Only a company's top official can serve. The board also includes representatives (also at the executive level) from key public agencies in the region (those for economic and business development, water, ports, and workforce, for example). That includes the Southern California Association of Governments (SCAG), the designated Metropolitan Planning Organization and regional planning agency for the majority of the region that partners with the Leadership Council on economic development initiatives. Although no current elected public officials serve on the Leadership Council's board, the SCAG representative (its Executive Director) provides an important bridge to local governments and enables the council to be in sync with them.

➤ *Committees* – The Leadership Council has no standing committees. Instead, an issue-specific, action-oriented informal working group with a finite ending point is formed when the board and staff need expert advice on a topic. The working groups report back to the board as necessary and when their work is done. For example, one working group addressed international trade and the position of the region's ports and identified actions needed to maintain the ports' competitive edge (an illustration of the Leadership Council identifying and getting out in front of an issue). The Leadership Council finds that the working group approach enables it to be more flexible and nimble than having standing committees. It also uses board member time more efficiently.

➤ *Staff* – Because of its ability to use the resources (data, for example) of the organizations that support it (its network of networks-approach), the Leadership Council can manage with a small staff that includes a president, managing director, and executive assistant.

➤ *Strategic Partners* – The Leadership Council's strategic partners < http://socallc.org/strategic-partners> are a group of leaders from key organizations (currently eight) in the business, labor, and academic communities from throughout the seven-county region. The partners help keep the Leadership Council up to speed on critical emerging issues within their scope or territory and, in turn, the Leadership Council works with its partners to advance the resolution of regional issues that affect multiple counties.

Funding

➤ *Source of Funds* – The Leadership Council's $540,000 annual core operating budget comes from memberships and annual dues. Funds for special projects, such as research, are raised on a case-by-case basis, both from members and external sources.

➤ *Allocation of Funds* – Funds are divided roughly into 80 percent for operations and 20 percent for projects (for some projects, includes funding for communications).

Accomplishments and Future Plans

➢ *Accomplishments* – The Leadership Council's major accomplishment is the ability to use its leadership to jump start action on selected issues. Because of the gravitas enabled by the three former California governors and the top corporate executives who serve on the Leadership Council's Board, heads turn and the public and other decision-makers listen when the board red flags an issue. For instance, because an opinion page editorial on an issue was signed by the governors, it enjoyed "long-legged coverage," meaning that the editorial was still quoted a year or more later. The Leadership Council, a staff member observed, "lives in the space of a vision of the region and its long-term needs." It also "lives in the space of a regional connector (between both sides of the aisle and between different issues and geographies)."

➢ *Future Plans* – Because it is already looking into the future, the Leadership Council does not predict a big change in its focus over the next several years. The council's practice of annually assessing progress on each issue being addressed enables it to identify the next strategic actions it needs to take year by year.

Lessons Learned

➢ Involve the region's top civic and business leaders: those individuals who have the capacity to see the region as a whole, think of it over the long term, and work across issues and geographies. When, for example, governors who come from different political parties can agree on an issue, their message has impact.

➢ Make sure that the board of directors involves people with diverse views and from different parts of the region. If they can find common ground on tough issues, that increases the likelihood that others will also.

➢ Listen and learn from other organizations. The Leadership Council's board, for example, meets with board members from other organizations to learn more about a particular issue (workforce development, for example).

➢ By working as a network of networks, the Leadership Council is seen by other organizations as adding value to them and not as a competitor for leadership or funding. That comes from the council's ability to fill a leadership gap by convening and mobilizing organizations that may not typically work together to take the actions needed to solve a problem of regional importance. Achieving goals by working with and through other organizations means that the Leadership Council is less concerned about who gets the credit. To address that internally, each project work plan specifically outlines the council's measures of success (the specific deliverables) that will be the outcomes of its role. Defining up front and reporting on those outcomes have been important to attracting and retaining board members.

➢ Narrow the number of issues to focus on. The Leadership Council does that by evaluating where the need is and where the organization can make a difference.

- Leverage resources (achieved by the Leadership Council through its network of networks). One example is the current partnership with the Los Angeles County Economic Development Corporation to build on their research on closing the workforce skills-job gap.

VALLEY VISION

Connecting Citizens, Shaping Solutions

Regional Characteristics

➢ *Number of Cities and Counties:* Six counties and 22 cities

➢ *Current and Projected Population:* Current, 2010, 2.3 million for the six-county region (including the Tahoe Basin); projected, 3.1 in 2035

➢ *Land Area:* 6,561square miles (a little over 20 percent of the land area is in federal ownership and cannot be developed). Roughly half of the metro area is urbanized, with the other half in active agricultural production.

Sacramento Metropolitan Area
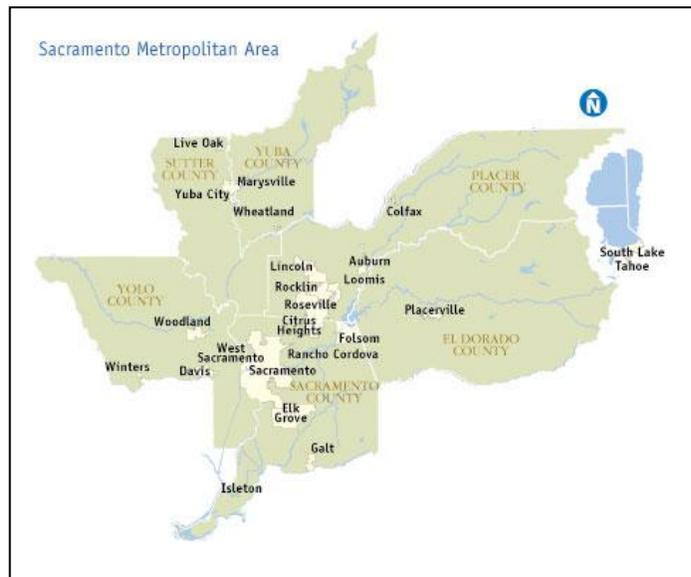
➢ *Form:* Sacramento, the region's urban core, is located in the south central part of the region and ringed by large job and housing centers and cities along the Interstate 80 and U.S. 50 road corridors.

History

➢ *Origins* – Valley Vision is a civic leadership organization founded in 1994 to secure the social, environmental, and economic health of the Sacramento region. Its founders' goal was an organization that would serve as an objective, nonpartisan action tank committed to regional problem solving. It has achieved that by generating independent, impartial research for sound decision making and acting as a bridge that enables a diverse cross-section of the region's leadership from business, government, agriculture, the environmental community, organized labor, education, utilities and the nonprofit sector to work together, thereby making a greater difference than could have been made by each acting separately.

➢ *Evolution* – Valley Vision has maintained and expanded its emphasis on decisions made on sound research and its role as a trusted neutral convener and connector committed to identifying and building consensus and coalitions around solutions to regional problems. It is for those reasons that the Sacramento Area Council of Governments (SACOG) turned to Valley Vision to help ensure that its acclaimed planning process to develop the Sacramento Blueprint (a vision for the region's growth through 2050) was inclusive of all interests.

➢ *Current Focus* – Valley Vision continues to be involved with SACOG's regional planning work, including serving as a leader, co-convener, and strategic advisor for continuing work funded by a U.S. Department of Housing and Urban Development (HUD) Sustainable Communities Initiative grant. Its mainstay role is managing numerous coalitions and partnerships, including those related to the economy, clean air, green technology, broadband, and healthy communities.

Examples include the:

- Next Economy project <www.nexteconomycapitalregion.org>, a broad-based public-private partnership initiative led by area business leaders to accelerate new job creation in response to the 2008 recession. At its March 2013 Economic Summit the partnership released its Capital Region Prosperity Plan and announced the champion organizations (the region's leading economic development organizations and their business leadership) responsible for implementing it over the next five years. Five counties, 15 cities, and two workforce investment boards have already officially adopted the plan as their economic game plan. The plan is set up as common playbook for action, enabling organizations to select the "plays" that suit their strengths and capabilities and the needs of those they serve while achieving plan goals. It also contains action steps, performance measures, timetables, and an accountability structure.
- Green Capital Alliance <http://greencapitalalliance.org>, a partnership of people and business, academic, workforce, economic development, sustainability, and clean tech organizations that are working together to support the region's clean tech economy, promote regional sustainability, and grow green jobs. Members cross-pollinate ideas and collaborate on projects.
- California Stewardship Network <www.castewardship.org>, a strategic partnership led by stewardship teams composed of business, community, government, and civic entrepreneurs from 11 economic regions. The teams work together to launch breakthrough solutions to the state's most pressing challenges.
- Connected Capital Area Broadband Consortium, a regional broadband coalition that is working to identify and coordinate strategic broadband investments in the region.
- Regional Food Access Project**,** a collaborative focused on regional food policies that prioritize the elimination of health disparities and promote access to sustainable food.

Structure

➢ *Board* – Valley Vision's 30-member board is composed of recognized leaders from a variety of fields, including foundations, media, health care, social equity, education, and business. Business sectors represented include agriculture, the law, architecture, retail, engineering, communications, technology, and financial planning and investments. No public officials serve on the board.

➢ *Committees* – Valley Vision has a number of internal committees, including a Communications Committee, Executive Committee (also serves as a Finance Committee), and a Program Committee that helps define new projects based on 22 criteria to ensure that they are an organizational fit. An important factor is whether the project can be self sustaining (i.e., that Valley Vision can exit a project once it is up and running with the support of a strong coalition and the capacity to continue).

➢ *Staff* – Valley Vision is run by a staff of 12. Its leadership includes a CEO/Managing Partner, two Managing Partners, and three project managers.

Funding

➢ *Source of Funds* – Of its 2012 $1.85 million annual budget, 87 percent came from fees for services (restricted income) from foundations, businesses, and governments, and 13 percent from annual board dues and an annual Legacy Feast event that celebrates the people, food, and public places that make the region great (unrestricted income). The total annual budget varies each year based on the services provided.

➢ *Allocation of Funds* – Funds are divided into the following categories: 10-15 percent general administration, 75-85 percent projects (includes project-related staff labor and consultants), and 5 percent contractors' expenses (data maps, for example).

Accomplishments and Future Plans

➢ *Accomplishments* – Valley Vision's successes stem from its being the organization that the region's public and private sectors turn to for unbiased information and a neutral connecter. That includes looking to Valley Vision for solutions to what it describes as orphan problems: ones that exist in the white space on the organizational chart (the issues that do not wholly fit in one sector because they cross jurisdictions, organizations, and topics and often are the hot potatoes that, left unresolved, will hamper the region's progress or keep coming back). For such issues, Valley Vision plays a catalyst role that includes an exit strategy. It researches an issue and builds a coalition around it with the capacity, either through an existing or new organization, to continue without Valley Vision's support.

Examples of specific successes include:

- Serving as a convener and strategic advisor to SACOG for the development and current implementation of its award-winning and widely supported regional Blueprint.
- Shepherding its Next Economy project to the point where it is now being adopted by the region's cities, counties, and workforce boards and enjoys the support and lead involvement of the region's business and public sectors.
- Partnering with SACOG and the agricultural community to develop an economic and environmental sustainability plan for the region's rural areas (the rural counterpart to the regional Blueprint).
- Working with the region's four nonprofit health systems and a technology partner to build a searchable health care map (information is available at the ZIP code level) that aids decision-makers in targeting public and private health resources where they are needed most.
- An assessment of the region's four non-profit health care systems that identified barriers to health care for underserved populations.

> *Future Plans* – Valley Vision intends to expand its research capacity and its focus on being the regional connector that helps solve current and emerging problems. It is also expanding to other areas of the state.

Lessons Learned

Valley Vision views its role in the region as more important than ever before, given today's divided political, single-view environment. Through its attention to sound research and careful, balanced listening, Valley Vision has been able to institutionalize informed coalitions that are defenders of solutions because they were involved in their development. The value of its role, Valley Vision notes, is captured in the concept of "collective impact" introduced in the winter 2011 issue of the *Stanford Social Innovation Review* and described as "highly structured collaborative efforts that had achieved substantial impact on a large scale social problem"
<www.ssireview.org/blog/entry/channeling_change_making_collective_impact_work>.