



**AGENDA**  
**CITY OF LAKE WORTH BEACH**  
**REGULAR CITY COMMISSION MEETING**  
**CITY HALL COMMISSION CHAMBER**  
**TUESDAY, MARCH 07, 2023 - 6:00 PM**

**ROLL CALL:**

**INVOCATION OR MOMENT OF SILENCE:** led by Vice Mayor Christopher McVoy

**PLEDGE OF ALLEGIANCE:** led by Mayor Betty Resch

**AGENDA - Additions / Deletions / Reordering:**

**PRESENTATIONS:** (there is no public comment on Presentation items)

- A. Presentation of CMC (Certified Municipal Clerk) designation to Shayla Ellis, Deputy City Clerk, by Renee Basel, Palm Beach County Municipal Clerk Association President
- B. Proclamation declaring March 2023 as Women's History Month
- C. Proclamation declaring March 2023 as Let's Move Palm Beach County Month
- D. Proclamation declaring March 2023 as Palm Beach Pride Month

**COMMISSION LIAISON REPORTS AND COMMENTS:**

**CITY MANAGER'S REPORT:**

**PUBLIC PARTICIPATION OF NON-AGENDAED ITEMS AND CONSENT AGENDA:**

**APPROVAL OF MINUTES:**

- A. [Regular Meeting - February 21, 2023](#)
- B. [Pre-Agenda Work Session - February 22, 2023](#)

**UNFINISHED BUSINESS:**

- A. [Discussion of proposal received in response to Request for Proposals \(RFP\) for Housing Emergency Study and Rent Control Ordinance Analysis](#)
- B. [Discussion on Solicitation for L & M Streets Property Development](#)

**CITY ATTORNEY'S REPORT:**

**UPCOMING MEETINGS AND WORK SESSIONS:**

March 8 - Pre-agenda work session @ 9 AM  
March 21 - Regular @ 6 PM

**ADJOURNMENT:**

The City Commission has adopted Rules of Decorum for Citizen Participation (See Resolution No. 81-2022). The Rules of Decorum are posted within the City Hall Chambers, City Hall Conference Room, posted online at: <https://lakeworthbeachfl.gov/government/virtual-meetings/>, and available through the City Clerk's office. Compliance with the Rules of Decorum is expected and appreciated.

If a person decides to appeal any decision made by the board, agency or commission with respect to any matter considered at such meeting or hearing, he or she will need a record of the proceedings, and that, for such purpose, he or she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. (F.S. 286.0105)

**MINUTES  
CITY OF LAKE WORTH BEACH  
REGULAR CITY COMMISSION MEETING  
CITY HALL COMMISSION CHAMBER  
TUESDAY, FEBRUARY 21, 2023 – 6:00 PM**

The meeting was called to order by Mayor Resch on the above date at 6:03 PM in the City Commission Chamber located at City Hall, 7 North Dixie Highway, Lake Worth Beach, Florida.

**ROLL CALL:** (0:15) Present were Mayor Betty Resch, Vice Mayor Christopher McVoy, Commissioners Sarah Malega, Kimberly Stokes and Reinaldo Diaz. Also present were City Manager Carmen Davis, City Attorney Christy L. Goddeau and Deputy City Clerk Shayla Ellis.

**INVOCATION OR MOMENT OF SILENCE:** (0:34) was led by Commissioner Sarah Malega.

**PLEDGE OF ALLEGIANCE:** (1:05) was led by Commissioner Reinaldo Diaz.

**ADDITIONS/DELETIONS/REORDERING:** (1:26)

There were no changes to the agenda.

**PRESENTATIONS:** (1:34) (there is no public comment on Presentation items)

- A. Certificate of Appreciation from the Daughters of the American Revolution to the City of Lake Worth Beach for funds donated to Lake Worth Community High School (1:37)
- B. Presentation by School Board Members Edwin Ferguson and Erica Whifield regarding the State of Education (10:02)
- C. Palm Beach Fire Rescue Update by Geraldine Jaramillo, District Chief (33:52)
- D. Library Advisory Board Update by Mary Lindsay (48:18)

**COMMISSION LIAISON REPORTS AND COMMENTS:** (1:07:28)

**CITY MANAGER'S REPORT:** (1:31:27)

City Manager Davis provided the following report:

- announced the two projects presented by staff to the legislators and sponsored by Rep. Caruso, the Intracoastal Infrastructure Vulnerability Assessment and Phase II of the Parrot Cove Stormwater Resilience
- reported that the Budget Kick-off for Department Directors would be held tomorrow and the schedule would be provided to the commission
- said that the Employee Appreciation Bar-B-Que would be scheduled for next month

**PUBLIC PARTICIPATION OF NON-AGENDAED ITEMS AND CONSENT AGENDA:** (1:35:25)

**APPROVAL OF MINUTES:** (1:41:18)

**Action:** Motion made by Commissioner Malega and seconded by Commissioner Diaz to approve the following minutes:

- A. Regular Meeting - February 7, 2023
- B. Pre-agenda Work Session - February 8, 2023
- C. Special Meeting - February 9, 2023

**Vote:** Voice vote showed: AYES: Mayor Resch, Vice Mayor McVoy, and Commissioners Malega, Stokes and Diaz. NAYS: None.

**CONSENT AGENDA:** (1:41:26)

**Action:** Motion made by Vice Mayor McVoy and seconded by Commissioner Malega to approve the Consent Agenda.

- A. Payments of Fiscal Year 2021/2022 Invoices

**Vote:** Voice vote showed: AYES: Mayor Resch, Vice Mayor McVoy, and Commissioners Malega, Stokes and Diaz. NAYS: None.

**PUBLIC HEARINGS:** (1:41:35)

- A. Ordinance 2022-15 – Second Reading – Approval of an Urban Planned Development, Major Site Plan, Conditional Use Permit (CUP), and Sustainable Bonus Incentive Program (SBIP) requests for the project commonly referred to as “Lake Worth Station” located at 930 N G Street to construct a 4 to 5-story, 91 dwelling unit multi-family development with 39 multi-family units proposed to qualify as workforce housing.

City Attorney Goddeau read the ordinance by title only.

ORDINANCE NO. 2022-15 AN ORDINANCE OF THE CITY COMMISSION OF THE CITY OF LAKE WORTH BEACH, FLORIDA, AMENDING THE OFFICIAL ZONING MAP BY APPROVING THE CREATION OF AN URBAN PLANNED DEVELOPMENT DISTRICT, LOCATED AT 930 NORTH G STREE TO CONSTRUCT AN APPROXIMATELY 5-STORY, 91-UNIT MULTI-FAMILY RESIDENTIAL DEVELOPMENT AS MORE PARTICULARLY DESCRIBED IN EXHIBIT A, LOCATED WITHIN THE TRANSIT ORIENTED DEVELOPMENT - EAST (TOD-E) ZONING DISTRICT WITH A FUTURE LAND USE DESIGNATION OF TRANSIT ORIENTED DEVELOPMENT (TOD) SUBJECT TO SPECIFIC DEVELOPMENT STANDARDS SET FORTH IN EXHIBIT B AND CONDITIONS OF APPROVAL SET FORTH IN EXHIBIT C; APPROVING A CONDITIONAL USE PERMIT; APPROVING HEIGHT AND DENSITY BONUS INCENTIVES THROUGH THE CITY’S SUSTAINABLE BONUS INCENTIVE PROGRAM; APPROVING A MAJOR SITE PLAN FOR THE DEVELOPMENT OF A MIXED USE URBAN PLANNED

DEVELOPMENT; PROVIDED FOR SEVERABILITY, CONFLICTS AND AN EFFECTIVE DATE

**Action:** Motion made by Commissioner Stokes and seconded by Commissioner Malega to approve Ordinance 2022-15 approving an Urban Planned Development, Major Site Plan, Conditional Use Permit (CUP), and Sustainable Bonus Incentive Program (SBIP) requests for the project commonly referred to as “Lake Worth Station” located at 930 N G Street to construct a 4 to 5-story, 91 dwelling unit multi-family development with 39 multi-family units proposed to qualify as workforce housing.

**Vote:** Voice vote showed: AYES: Mayor Resch, Vice Mayor McVoy, and Commissioners Malega, Stokes and Diaz. NAYS: None.

The meeting recessed at 8:00 PM and reconvened at 8:11 PM.

**NEW BUSINESS:** (2:08:03)

A. Third Amendment to Retail Lease with RTT – Benny's on the Beach, Inc., the current tenant/assignee (2:08:05)

**Action:** Motion made by Commissioner Malega and seconded by Mayor Resch (who passed the gavel) to approve the Third Amendment to Retail Lease with RTT – Benny's on the Beach, Inc., the current tenant/assignee. **Motion was amended.**

**Action:** Amended motion made by Commissioner Malega and seconded by Mayor Resch to approve a month-to-month lease for with RTT – Benny's on the Beach, Inc., the current tenant/assignee at the current lease terms to allow for further negotiations. **Motion amended for a second time.**

**Action:** Second amendment to the motion made by Commissioner Malega and seconded by Mayor Resch to approve the Third Amendment to Retail Lease with RTT – Benny's on the Beach, Inc., the current tenant/assignee for a 90-day extension at the new lease terms to allow for further negotiations of the proposed lease.

**Vote:** Voice vote showed: AYES: Mayor Resch, Vice Mayor McVoy, and Commissioners Malega, Stokes and Diaz. NAYS: None.

B. Discussion of Fiscal Year 2023 Community Development Block Grant Application (3:11:42)

**Action:** Motion made by Commissioner Malega and seconded by Commissioner Stokes to approve the proposed project for the renovation of the Osborne Center.

**Vote:** Voice vote showed: AYES: Mayor Resch, Vice Mayor McVoy, and Commissioners Malega, Stokes and Diaz. NAYS: None.

**CITY ATTORNEY'S REPORT:**

City Attorney Goddeau did not provide a report.

**UPCOMING MEETINGS AND WORK SESSIONS:**

February 28 - Utility @ 6 pm

March 7 - Regular @ 6 pm

March 8 - Pre-agenda work session @ 9 am

**ADJOURNMENT:** (3:29:12)

**Action:** Motion made by Commissioner Stokes and seconded by Vice Mayor McVoy to adjourn the meeting at 9:33 PM.

**Vote:** Voice vote showed: AYES: Mayor Resch, Vice Mayor McVoy, and Commissioners Malega, Stokes and Diaz. NAYS: None.

\_\_\_\_\_  
Betty Resch, Mayor

ATTEST:

\_\_\_\_\_  
Melissa Ann Coyne, City Clerk

Minutes approved March 7, 2023.

Item time stamps correspond to the video recording of the meetings on YouTube.

**MINUTES  
CITY OF LAKE WORTH BEACH  
CITY COMMISSION PRE-AGENDA WORK SESSION  
CITY HALL COMMISSION CHAMBER  
WEDNESDAY, FEBRUARY 22, 2023 - 9:00 AM**

The meeting was called to order by Mayor Resch on the above date at 9:03 AM in the City Commission Chamber located at City Hall, 7 North Dixie Highway, Lake Worth Beach, Florida.

**ROLL CALL:** (0:33) Present were Mayor Betty Resch; Vice Mayor Christopher McVoy and Commissioners Sarah Malega, Kimberly Stokes and, Reinaldo Diaz. Also present were City Manager Carmen Davis, City Attorney Glen Torcivia and City Clerk Melissa Ann Coyne.

**UPDATES / FUTURE ACTION / DIRECTION:**

**Action:** Consensus to sponsor a square for \$1,000 from the City Commission's discretionary fund at the Street Painting Festival. (34:05)

Vice Mayor McVoy left the meeting at 9:52 AM.

Commissioner Malega left the meeting at 9:56 AM.

**ADJOURNMENT:** (54:03)

The meeting adjourned at 9:57 AM.

\_\_\_\_\_  
Betty Resch, Mayor

ATTEST:

\_\_\_\_\_  
Melissa Ann Coyne, City Clerk

Minutes Approved: March 7, 2023

Item time stamps correspond to the recording of the meeting on YouTube.

# STAFF REPORT REGULAR MEETING

**AGENDA DATE:** March 7, 2023

**DEPARTMENT:** City Manager

**TITLE:**

Discussion of proposal received in response to Request for Proposals (RFP) for Housing Emergency Study and Rent Control Ordinance Analysis

**SUMMARY:**

The City of Lake Worth Beach will discuss the proposal from Florida Atlantic University to provide a housing emergency study and rent control ordinance analysis.

**BACKGROUND AND JUSTIFICATION:**

The City Commission recognizes the existing housing crisis and declared a Housing Crisis State of Emergency at its August 16, 2022 meeting. A housing study is needed in order to decide on potential next steps to address the issue. The City Commission approved issuance of Request for Proposal RFP # 23-200 for Housing Emergency Study and Rent Control Ordinance Analysis at its December 6, 2022 meeting. Request for proposal was advertised at the Palm Beach Post and City's website and e-mail invitations were sent to multiple Florida based educational institutions.

The City received one timely proposal from Florida Atlantic University before the designated deadline. As only one proposal has been received, City may consider a single proposal for further discussions and award.

**DIRECTION:**

Move to approve/disapprove directing City Staff to enter into more detailed discussions and negotiations with Florida Atlantic University aimed at arriving at a finalized agreement, with such Agreement to be brought back to the City Commission for further consideration.

**ATTACHMENT(S):**

Fiscal Impact Analysis – N/A

Florida Atlantic University Proposal

Florida Atlantic University Presentation

**Lake Worth Beach Housing Emergency Study and Rent Control Ordinance Analysis**  
Research Proposal  
RFP #23-200

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9. Appendix
  - a. Exhibit B - City Campaign Contribution Statement
  - b. Exhibit F – Confirmation of Drug-Free Workplace
  - c. Exhibit G – Scrutinized Companies Certification Form
  - d. Exhibit H – Veteran Business Enterprise, Small Business, and Local Business Preference Form



EXHIBIT "C"

RFP# 23-200 Housing Emergency Study and Rent Control Ordinance Analysis

RESPONDENT INFORMATION PAGE

Company Name: Florida Atlantic University

Authorized Signature: Muriel Industrious

Signature  
Muriel Industrious

Print Name

Title: Associate Director, Sponsored Programs

Physical Address: 777 Glades Road, Building 104, 3rd Floor

Street  
Boca Raton FL 33431  
City State Zip Code

Telephone: 954-236-1369 Fax: \_\_\_\_\_

Email Address: sponsoredprograms@fau.edu

Website (if applicable): https://www.fau.edu/research-admin/sponsored-programs/

Federal Identification Number: 65-0385507

This is a requirement of every Respondent.

State of Incorporation: Florida



The Dorothy F. Schmidt College of Arts & Letters  
Department of Sociology, CU 253  
Florida Atlantic University  
777 Glades Rd  
Boca Raton, FL 33431  
Tel: 561-297-3270  
Fax: 561-297-2511

January 24, 2023

Dear Members of the Evaluation Committee:

We are writing to submit a proposal for Lake Worth Beach RFP #23-200: Housing Emergency Study and Rent Control Ordinance Analysis. We are associated with Florida Atlantic University (FAU), a public research university located in Boca Raton. FAU was established in 1961 and currently enrolls more than 30,000 undergraduate and graduate students. Its faculty members and graduate students have studied some of the most pressing issues in our society, including the effects of climate change, responses to the COVID-19 pandemic, and the affordable housing crisis. They have also contracted with municipalities across Florida to conduct studies that are similar in nature and scope to this RFP, including a political redistricting study for the City of Lake Worth Beach.

The FAU research team applying to conduct the City's housing study and rent control ordinance analysis includes the following faculty members and graduate students:

- Philip Lewin, Ph.D., Associate Professor of Sociology
- Yanmei Li, Ph.D., Associate Professor of Urban and Regional Planning
- Carter Koppelman, Ph.D., Assistant Professor of Sociology
- Jodie Boisvert, M.P.A., Ph.D. student in the Culture, Politics, and Society Program
- Annabelle Campbell, M.B.A., Ph.D. student in the Culture, Politics, and Society Program

Philip Lewin will serve as the principal investigator and primary contact for this study. Yanmei Li and Carter Koppelman will serve as co-investigators. Jodie Boisvert and Annabelle Campbell will work as research assistants.

Our application packet contains a statement about our licenses, a detailed study proposal, a cost effectiveness statement and budget, a statement regarding our successful past experiences and qualifications, a list of similar projects and references, and a statement confirming that we have not faced default, termination, litigation, or debarment within the past five years.

In closing, we would like to thank you for considering our proposal to carry out the City's housing emergency study and rent control analysis. If you have any questions about our proposal, or if you would like additional information from us, please contact us at any time.

Boca Raton • Dania Beach • Davie • Fort Lauderdale • Jupiter • Treasure Coast

*An Equal Opportunity/Equal Access Institution*

Kind regards,

A handwritten signature in black ink, appearing to read 'Philip Lewin', with a long horizontal line extending to the right.

Philip Lewin, Ph.D.  
Associate Professor of Sociology  
Florida Atlantic University

### **Proof of Licenses**

Because FAU is not a company or contractor, but rather a public state entity, we are not required to be licensed through the Department of Business and Professional Regulation as a typical company would be. Copies of the researchers' educational credentials and academic appointment letters can be furnished upon request.

FAU carries fleet automobile liability insurance, property insurance, general liability insurance, state employee workers' compensation and employer liability insurance, federal civil rights liability and employment discrimination insurance, and court awarded attorney fees insurance. Copies of these certificates of insurance can be found at the following URL:

<https://www.fau.edu/ehs/safetv/risk-management-program/>.

Please contact us if you have additional questions about our applicable licenses, insurance certificates, and/or qualifications to perform this study.

## **Responsiveness to RFP**

### **Lake Worth Beach Housing Emergency Study and Rent Control Ordinance Analysis Research Proposal RFP #23-200**

#### **Introduction: Lake Worth Beach’s Housing Crisis State of Emergency Declaration**

On August 16, 2022, Lake Worth Beach’s City Commission passed Resolution No. 57-2022, which declared a “housing crisis state of emergency.” The commission passed the resolution in response to mounting evidence that housing prices were appreciating at an unsustainable rate across the Tri-County area. Florida Atlantic University’s (FAU) most recent Real Estate Initiative report found that prices across the Tri-County area were overvalued by more than 38 percent relative to historical norms (Beracha & Johnson Housing Market Ranking 2022a), and that South Florida had one of the most overvalued markets in the country (Beracha & Johnson Housing Market Ranking 2022b).<sup>1</sup> Similarly, a 2021 Affordable Housing Needs Assessment found that only 13 percent of Palm Beach County residents could afford a median value home, and that the county was losing 17,000 affordable homes to appreciation annually (Rhodes 2021; FIU Metropolitan Center & HLCPCB 2022). When the report was published, the median value of a single-family home was \$418,000. Today the median value of such a home is \$565,000—an increase of 35 percent in less than two years (Miller 2022)<sup>2</sup>. Given the rapid level of price appreciation, most homeowners in the county would not be able to afford their home in today’s market (Cato 2022; Sachs 2022).

Unaffordable home prices—coupled with stagnant wages and salaries—have consigned many county residents to the rental market, where they have few affordable options and are struggling to make their monthly payments. When Palm Beach County released its Housing Needs Assessment in 2021, there was a shortage of at least 78,000 affordable and workforce housing units in the area (Rhodes 2021). Since that time, the county has experienced rapid population growth (Miller 2023);<sup>3</sup> the economic development initiatives of the county’s Business Development Board have accelerated processes of gentrification (Sczesny 2022);<sup>4</sup> private equity

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<sup>1</sup> The Miami metropolitan statistical area (MSA) encompasses the nearly 6.2 million people who live in Miami-Dade, Broward, and Palm Beach counties.

<sup>2</sup> This price is down nine percent from the county’s record high, which reached \$620,000 in June 2022.

<sup>3</sup> According to driver’s license data, Palm Beach County gained 37,637 new residents in 2022. This reflects a 2.5 percent rate of population growth, which is 6.25 times the national population growth rate of 0.4 percent (Census Bureau 2022).

<sup>4</sup> The BDB, which is the county’s official economic development organization, works to attract corporate relocations to Palm Beach County. In recent years, they have courted financial services firms and technology companies, with the goal of transforming South Florida into a “Wall Street South” and “Silicon Coast.” By successfully recruiting blue chip companies such as BlackRock and Goldman Sachs, they have brought thousands of very high-income households into the county. Indeed, over the past five years, the BDB has facilitated 140 corporate relocations that

firms and real estate investment trusts (REITs) have converted hundreds of local properties into speculative investments (Joint Center for Housing Studies 2022);<sup>5</sup> state preemption laws have enabled small investors to convert large numbers of residential housing units into short-term vacation rentals (Owers 2023); wealth inequality has augmented the incidence of seasonal homeownership (FIU Metropolitan Center 2008);<sup>6</sup> Floridians displaced by Hurricane Ian have taken temporary refuge in the county (Robles et. al 2022; Olivo & Craig 2022);<sup>7</sup> labor shortages, supply-chain disruptions, inflation, and rising interest rates have slowed new housing starts—especially in the affordable market (Lyons 2022; Sisson 2022; Badger 2022; Miller 2023); and the collapse of the state’s homeowner’s insurance market has increased the cost of property ownership (III 2022).<sup>8</sup> These factors have converged to exacerbate the existing affordable housing shortage. Over the past two years, the county’s vacancy rate has dropped from 8.1 percent to 4.8 percent, and rents have increased by 39 percent. This has translated into a \$500 to \$600 monthly hike for many renters (Miller 2022; Owers 2022; FHDC 2023).

These extreme price increases have caused considerable hardship. Because most Americans live paycheck to paycheck (Melillo 2022), they must forgo necessities when their monthly expenses increase, including groceries, utility payments, schooling, and healthcare. Data from the Census Bureau suggest that South Floridians have begun to make these tradeoffs. According to the

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have brought 13,110 jobs with an average salary of \$80,000. Last year alone, relocations from New York brought \$34 billion of wealth into Florida, and Palm Beach County was its top destination—a change that has augmented wealth disparity. The county is now home to 42 billionaires and 71,000 millionaires (BDBPBC 2022). The arrival of new high-income households, coupled with the redevelopment of urban space for use by the wealthy, has displaced residents with lesser financial means. As the BDB’s CEO stated in a recent interview, “[the people we recruit] come and buy large and expensive homes” (Rhodes 2020). Such buying can push lower-income groups out of the market.

<sup>5</sup> In 2022, institutional investors purchased 25-28 percent of single-family homes listed on the market in the United States.

<sup>6</sup> Researchers have found that high rates of seasonal homeownership cause disproportionate rental and home price increases (Smith 2022). Moreover, a report by FIU’s Metropolitan Center (2008) concluded that “the significant increase in ‘vacant seasonal’ homes in Palm Beach and Martin Counties since 2000 has impacted the availability of rental housing.” Today, Palm Beach County—with nearly 100,000 units belonging to seasonal residents—ranks second on a list of counties with the most second homes in the United States (Zhao 2020). The trend is likely accelerating, given that 15 percent of new housing starts in 2021 were purchased as second homes in the U.S. (Emrath 2021).

<sup>7</sup> Many victims of Hurricane Ian have relocated to Palm Beach County, taking refuge in hotels and vacation rentals. Because the county had been using hotels as temporary shelters for people experiencing homelessness due a lack of shelter space and rapid rehousing options, the influx of refugees further strained the county’s housing system.

<sup>8</sup> Due to fraudulent roof replacement schemes, excessive litigation, the ability of attorneys to add multiplier fees to litigated cases, and the increasing property threats associated with climate change, numerous insurers have left the Florida market or been declared insolvent. Floridians thus pay nearly three times more in insurance costs than the national average.

Household Pulse Survey, 42.5 percent of households in the Tri-County area had difficulty covering their basic household expenses during the past year, and 41.5 percent needed assistance feeding their children. An additional one-fifth could not fully pay their energy bill during the previous 12 months (Household Pulse Survey 2022).

Rising rents have also had negative effects on local educational institutions. 4,431 Palm Beach County students experienced homelessness during the 2021-22 academic year—a 1,500 person increase compared to the 2020-21 school year.<sup>9</sup> School Board members have attributed the growing incidence of homelessness to increasing housing costs (Wilson 2022). Rising costs may also be forcing local students to drop out of college. Florida public colleges lost 16,000 students in 2021 and are on track to lose an additional nine percent over the next several years (Dailey 2021).

Worse still, many households cannot afford their rent payments even after forsaking food, utilities, and education. Eviction rates have increased markedly since 2020. During December 2022 alone, landlords filed 970 eviction complaints across Palm Beach County—a figure that undercounts the true incidence of eviction, because it does not include the number of three-day notices that landlords have issued to tenants, nor the number of informal evictions they have conducted. It also does not account for the evictions the County’s Emergency Rental Assistance (ERA) program has prevented. As of November 2022, the County had processed more than 29,000 applications for assistance and dispensed \$135 million in aid to residents (Eppinger 2022).

As residents exhaust their benefits, and as the program’s funding runs out, evictions will likely increase. Data from the Household Pulse Survey show that more than 10 percent of Tri-County residents are currently behind on their rent or mortgage—a proportion that is nearly double the national average of 5.8 percent. Even more alarming, 48.1 percent of South Florida households believe they are “somewhat likely” or “very likely” to face eviction or foreclosure within the next two months. Members of vulnerable groups—such as senior citizens, children, single parents, and minorities—face special risk (Desmond 2016). A shocking 80 percent of Florida seniors believe they are at least “somewhat likely” to be evicted in the next two months relative to the national average of 32 percent (Buczyner 2022). Given that local housing agencies are strained, waiting lists are long, and housing shelters are full, the county is ill-prepared to deal with this eventuality.

Due to these deteriorating conditions, the *Washington Post* has characterized the Miami Metro area as “the center of America’s housing crisis” (Funcheon 2022); the *Miami Urban Future Institute* has described South Florida’s affordable housing crisis the worst in the nation (Remington 2019); sociologist Andrew Ross has claimed that Florida exemplifies “the failure of American housing” (Ross 2021); and the *Housing Leadership Council of Palm Beach County* (2022) has declared that “Palm Beach County has an affordable and workforce housing crisis” (p.2). Indeed, with an astounding 84 percent of South Florida residents concerned about rising prices (Household Pulse Survey 2022), coverage of housing conditions has dominated local

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<sup>9</sup> These data were obtained from a public records request. An abundance of research shows that housing insecurity impairs the academic readiness and achievement of students (Manfra 2018).

media during the past two years. *WPTV* launched a multi-part series titled “Priced out of Paradise,” which documents the rising toll housing prices have exacted on the public (Pacenti 2022), and the *Palm Beach Post* initiating a series of special investigations into the failure of the county’s Workforce Housing Program (Mara 2022a; Marra 2022b; Marra 2022c).

Public concern with housing prices has also translated into collective anxiety and a slew of demonstrations—particularly in Lake Worth Beach, where nearly 60 percent of households are renters. The county’s 2021 assessment found that two-thirds of Lake Worth Beach renters were cost-burdened, meaning that they allocated more than 30 percent of their earnings to housing (FIU Metropolitan Center & HLCPCB 2021).<sup>10</sup> McKinney-Vento data from the same period indicated that one in 14 Lake Worth Beach students were homeless because their parents could not afford a permanent residence—a reality that became manifest when a tent city with more than 70 temporary dwelling sprung up in John Prince Park during the COVID-19 pandemic (PB Post 2020). At the time, the median gross rent in the city was \$1,139. Today the median asking rent is nearly twice as high: \$2,214.<sup>11</sup> To put the increase into perspective, fewer than five percent of LWB households were paying more than \$2,000 per month in 2020. Whereas the median gross rent in LWB rose 19 percent from 2007 to 2018 (\$927 to \$1,139), the median asking rent has increased 194 percent relative to the 2018 median gross rent in the past four years alone (\$1,139 to \$2,214).<sup>12</sup>

In response to the hardships that skyrocketing home prices and rents have caused, city residents began signing a pair of petitions that surfaced in August 2022. The first called for the city to declare a “housing crisis state of emergency,” and the second called for the City to enforce an ordinance that prohibits short-term vacation rentals. Shortly thereafter, a well-attended rally occurred at City Hall, where residents expressed their concerns about deteriorating housing conditions. At the two commission meetings that followed, residents continued to make public comments about the disruptions that accelerating housing costs, homelessness, and gentrification had caused in their community. Several spokespeople from prominent local community organizations, such as the Guatemalan-Maya Center, advocated for government action to address the affordable housing shortage during them.

In response to concerns about housing affordability, Lake Worth Beach commissioners have taken a variety of actions, including:

- Providing funding to Palm Beach County’s Legal Aid Society to assist residents facing eviction

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<sup>10</sup> Based on a monthly median household income of \$3,499.75 (in 2020 dollars, 2016-2020, \$41,997 annually).

<sup>11</sup> This figure is based on Zillow’s ZORI index for zip code 33460, which roughly encompasses Lake Worth Beach city limits. Although the \$2,214 figure captures only current market conditions—that is to say, the prices that landlords who have listed properties on the MLS are asking at present—the 194 percent price increase between 2020 and 2023 is nonetheless striking.

<sup>12</sup> See (FIU Metropolitan Center & HLCPCB 2022) and Lake Worth Beach historic ACS and Census tables.



- Passing Ordinance 2022-12, which established an Affordable/Workforce Housing Trust Fund and requires that a percentage of density, intensity, and/or height bonuses be dedicated to affordable/workforce housing
- Passing Ordinance 2022-13, which amended the City’s LDRs to allow for the development of affordable micro-units (small 250-750 sqft dwellings)
- Passing ordinance 2022-14, which redoubles requirements for builders to pursue “social justice” and “sustainability” in new projects.

The commission also unanimously passed an emergency resolution that directed city staff to explore various options for addressing the city’s housing crisis.

After investigating the issue, the Lake Worth Beach City Attorney, Glen Torcivia, recommended that the City solicit proposals for the performance of a housing study. The purpose of such a study would be to firmly establish whether Lake Worth Beach faces a “housing emergency so grave as to constitute a serious menace to the general public”; determine what effects the housing emergency is having on the general public’s health, safety and welfare; identify the factors that have contributed to the housing crisis; determine whether a rent control ordinance is “necessary and proper to eliminate such a grave housing emergency”; examine how such an ordinance should be structured, and what the City would need to implement it; identify what other policies and ordinances the City could implement to improve housing access and equity; and compile data that would facilitate the City’s ability to apply for external housing resources.

We are writing to request the opportunity to perform the City’s housing emergency study and rent control ordinance analysis. In the remainder of this proposal, we will outline the research questions our study would address, the data and methods it would employ to answer them, and the ways in which the City could use the knowledge we would produce to improve housing conditions in Lake Worth Beach. We have included our credentials, curriculum vitae, and references within the application packet. As they indicate, we are well-qualified, committed to housing equity, and have already begun studying housing conditions in Lake Worth Beach with “community engagement grants” obtained through FAU.

### **Research Questions**

If selected to carry out this study, our team will address the following research questions:

- (1) What constitutes a “grave housing emergency?” What constitutes a “serious menace to the general public?”
- (2) Is there a grave housing emergency in the City of Lake Worth Beach? If so, what is its extent, scope, and nature?
- (3) What effects have rising housing costs and changing housing market conditions had on the health, safety, and welfare of Lake Worth Beach residents? Do these effects pose a “serious menace to the general public?”

- (4) What are the underlying causes of the housing crisis in the City of Lake Worth Beach? What role (if any) have population growth, real estate speculation, the diffusion of short-term vacation rentals, seasonal migration, community redevelopment initiatives, growth management policies and land development regulations, county-level economic development and housing policy, and rising insurance rates played in the crisis?
  
- (5) What measures or ordinances are necessary and proper to improve housing affordability in the city of Lake Worth Beach and to protect the health, safety, and welfare of residents? What resources, data, and/or requirements are needed to implement such measures or ordinances? What actions and ordinances would improve the local housing system with the greatest efficiency and efficacy? In what order should such actions and ordinances be enacted, and what timelines would they require for providing relief?
  
- (6) Is a rent control ordinance necessary and proper for addressing the City’s housing needs? Would such an ordinance conform to state legal requirements?

Answering these diverse and far-reaching questions will require a multi-faceted research methodology. In the subsequent sections, we describe the data and methods we anticipate utilizing to address each question.

**Methodology for Question #1: What Constitutes a “Grave Housing Emergency?” What Constitutes a “Serious Menace to the Public?”**

To determine what constitutes a “grave housing emergency,” our research team will conduct a thorough review of the social scientific literature on housing security and housing policy to create a legally sound and scientifically measurable conception of “housing emergency.” Our report will define what a housing emergency is, detail the typical causes and consequences of housing emergencies, and develop a method for assessing whether a housing emergency is present or absent in a municipality—along with how severe it is. When doing so, we will review the criteria that other Florida municipalities have employed when declaring housing emergencies to ensure that our definition is consistent with, and based on the precedents of, previous uses of the term.

Similarly, we will conduct a thorough review of relevant social scientific literature to define, and develop a procedure for operationalizing, the phrase “serious menace to the general public.” In doing so, we will answer the following questions: At one point do housing conditions cease to be unfavorable and become a “serious menace?” At what point do housing conditions threaten the “general public” as opposed to select populations?

When developing procedures for assessing whether a “grave housing emergency” that poses a “serious menace to the general public” is present, we anticipate utilizing the following metrics:

- *Rate of price change* – When housing costs increase sharply and/or unexpectedly; when they increase at an unprecedented rate; and/or when external factors impede people’s

ability to cover housing expenses (e.g., reduced or stagnant earnings due to unemployment, wage cuts, and/or inflation in other spending domains).

- *Incidence of distress* - When housing conditions become unaffordable to, or threaten the well-being of, typical households in the community; when they become unaffordable to most people in the community; and/or when they become unaffordable in most neighborhoods of the community.
- *Severity and magnitude of household effects* - When changes in the housing market cause measurable reductions in indicators of individual or household well-being (e.g., economic self-sufficiency, academic achievement, subjective well-being, etc.); when housing conditions cause serious problems for discrete populations (e.g., cost burden; overcrowding; impaired physical health; impaired mental health; eviction; displacement; school dropout; homelessness; etc.); and/or when housing conditions threaten vulnerable groups (e.g., racial and ethnic minorities, children, the elderly, low-income households, etc.).
- *Secondary and community effects* - When housing conditions disrupt social order (i.e., conflict, disturbance of peace), threaten foundational social institutions (e.g., the economy, education, healthcare, etc.), and/or strain social service providers (e.g., public housing authorities, rapid rehousing organizations, shelters, emergency assistance programs, etc.); and/or when such disruptions manifest in protests, labor shortages, business closures, long waiting lists for service delivery, etc.
- *Public perception and behavior* - When the public perceives an “emergency” or “menace”; when people act as if an emergency or menace is present; and/or when such perceptions and behaviors influence housing conditions and community dynamics through self-fulfilling prophecy.

**Methodology for Question #2: Is there a grave housing emergency in the City of Lake Worth Beach? If so, what is its extent, scope, and nature?**

After developing procedures for assessing whether “a grave housing emergency that poses a serious menace to the general public” is present, we will collect and analyze multiple forms of data to determine whether a housing emergency is present in Lake Worth Beach.

Although the nuances of our research methodology will derive from the literature review we conduct for question #1, we anticipate analyzing the following factors: how housing market conditions map onto the economic means of local households; how recent increases in housing expenses compare to historical norms; the number of households that face difficulty covering their housing expenses, or that allocate an unsustainable portion of their earnings to housing costs; the number of households that are at risk for eviction; the deleterious effects housing costs have had on household welfare and community stability (e.g., displacements, evictions, homelessness, overcrowding, malaise, social conflict, etc.); the degree to which private enterprise is meeting housing demand; the degree to which local housing agencies and

organizations are satisfying demand for services; and the effectivity of existing affordable housing programs.

When carrying out our analysis and making our determination, we anticipate utilizing the following the measurements and procedures:

(1) **Social and Economic Characteristics:** Drawing from the American Community Survey (ACS), Decennial Census data, and ArcGIS data, we will generate descriptive statistics about Lake Worth Beach residents' social and economic characteristics and compare them to the profile for Palm Beach County as a whole. When creating our profiles, we anticipate compiling the following information into our report:

- Income distribution
- Occupational distribution
- Incidence and rate of poverty
- Incidence and rate of public assistance usage
- Incidence and rate of homeownership
- Distribution of educational attainment
- Racial and ethnic distribution
- Incidence and distribution of disability status
- Age distribution
- Family and household size distribution
- Commuter profile (i.e., how many residents work in the city; how far they commute on average; and how many people commute into the city)

These data will provide a basic portrait of who lives in Lake Worth Beach, the economic status of typical residents, the housing needs of typical residents, and how their economic characteristics and needs compare to those of the broader county's.

**Distribution of Housing Options:** Drawing from ACS and Decennial Census data, Florida Housing Data Clearinghouse data, Housing Authority records, and City/County building and public meeting records, we will generate descriptive statistics about the housing options that are available in Lake Worth Beach. We anticipate compiling the following information into our report:

- Distribution of housing units by size (i.e., number of rooms)
- Distribution of single- vs. multi-family units
- Distribution of occupied vs. vacant units
- Distribution of owner-occupied vs. rental units
- Distribution of market-rate, workforce, affordable, and public housing options in the city
- Number of residents receiving Housing Choice Vouchers
- Ratio of market-rate to non-market housing
- Number and type of units that developers have recently built
- Number and type of units that are currently under construction
- Number and type of units that developers are currently planning

Collectively, these data will enable us to determine if there is a housing shortage; how severe the shortage is; the types of units that are lacking or oversupplied; and whether recent and planned production is addressing critical areas of need. It will also allow us to compile a list of the non-market housing options that are available in Lake Worth Beach, report on the populations they serve, and determine if they adequately meet demand.

- (2) **Housing Quality:** Drawing from ACS data, Decennial Census data, American Housing Study (AHS) data, Palm Beach County parcel data, LWB code compliance records, county eviction records,<sup>13</sup> Palm Beach County’s 2021 Affordable Housing Assessment, permitting records, interviews with city planners and code enforcement officers, interviews with residents, and field observations, we will assess the quality of the city’s housing stock.

We anticipate compiling the following information about housing quality into our report:

- Descriptive statistics regarding the age and physical characteristics of the city’s housing stock (estimated with ACS and Decennial Census data)
- The approximate number of abandoned, distressed, and/or uninhabitable units in the city (estimated with ACS data, Census data, code enforcement data, and interview responses)<sup>14</sup>
- Neighborhoods in which distressed properties and blight are concentrated (estimated via low property values, property characteristics, vacancy rates, code and fire violations, interviews, and field observations)
- The most common maintenance and safety hazards that affect local households (e.g., rodents, insects, mold, leaks, etc.) (estimated via code compliance records, interviews, and field observations)
- Differences in housing quality between owner-occupied and rental housing units (estimated via code compliance records, interviews, and field observations)

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<sup>13</sup> Landlords often initiate evictions when tenants withhold rent due to poor housing quality and unaddressed maintenance requests. Although not a valid defense unless rents have been deposited into a court ledger, many tenants document the maintenance problems that are present in their units when filing affirmative defenses to eviction complaints.

<sup>14</sup> When making our assessments, we will draw from the “housing adequacy” standards that the Department of Housing and Urban Development (HUD) has established, which set criteria for “severely inadequate,” “moderately inadequately,” and “adequate” dwellings.

- The relationship between rising housing costs and housing quality (estimated via building permits, code compliance records, interviews, eviction records, and field observations)<sup>15</sup>

Collectively, these data will allow us to estimate the number of residents who are living in housing that is unsafe, inadequate, or undignified; the number of units that would benefit from redevelopment; and whether rising home values and rents have translated into physical improvements to the City's housing stock.

Such data will help us determine whether a grave housing emergency that poses a serious menace to the public is present, because diminution of quality is a core indicator of exploitation and inflation; because code non-compliance threatens public health, safety, and welfare; and because condemnations in cases of severe inadequacy lead to displacement.

- (3) **Current Home Values and Sale Prices relative to Historical Trends:** Drawing from recent transaction data from the Palm Beach County Property Appraiser (PAPA), the Zillow Home Value Index (ZHVI), and the FAU Beracha and Johnson Housing Market Ranking, we will generate descriptive statistics about current home ownership market conditions in Lake Worth Beach. We will compare these figures to historical trends to analyze the degree to which they deviate from normative expectations and represent manageable versus excessive appreciation.

We anticipate compiling the following information into our report:

- The median value of all units within the city
- The median and average sale prices for real estate transactions that have occurred during the past three years
- The median and average listing prices for units that are currently for sale
- The rate of appreciation in sales prices in recent years
- The degree to which wages and salaries have kept pace with price appreciation
- How recent price increases compare to historical norms
- The prices that would be affordable to residents based on their household size and income level

These data will enable us to estimate how much home values have increased in recent years, whether the increases conform to normal expectations, how many residents they

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<sup>15</sup> To analyze this relationship, we will draw from a sample of recent PAPA transaction records, code compliance records, building permit records, and Zillow listings to determine whether price appreciation—whether in sales prices or rents—has translated into measurable improvements to overall housing quality (e.g., a reduction in code violations, an accretion in applications for major improvement projects, visible cosmetic improvements based on archived Zillow listings, etc.).

have pushed out of the market, and the level of purchase assistance residents would require to enter the market.

- (4) **Current Rental Prices relative to Historical Trends:** Drawing from the Zillow Observed Rent Index (ZORI) and the ACS, we will generate descriptive statistics about current rental market conditions in Lake Worth Beach. We will compare these figures to historical trends to analyze the degree to which they deviate from normative expectations and represent manageable versus excessive appreciation.

We anticipate compiling the following information into our report:

- The average listing price for current rentals
- The median listing price for current rentals
- Median listing prices for current listings by number of bedrooms
- The median rental price for leased units
- The median rental price for leased units by number of bedrooms
- The rate of appreciation in rental prices in recent years
- The degree to which wages and salaries have kept pace with rental appreciation
- How the increases compare to historical norms

These data will enable us to estimate how much residents are paying in rent, how much their rents have increased in recent years, whether the increases conform to normal expectations, and whether they are affordable.

- (5) **Rental Stress and Affordability Standards:** Drawing from the data we collect for the questions listed above, we will estimate the number and ratio of “cost-burdened” and “severely cost-burdened” households in Lake Worth Beach by analyzing the city’s median income against its median gross rent (or combined mortgage payment). We will base our calculations on the benchmarks set by the Department of Housing and Urban Development (HUD), which defines households that spend more than 30 percent of their earnings as cost-burdened, and households that spend more than 50 percent as severely cost-burdened.

Drawing from U.S. Health and Human Services (HHS) data, Bureau of Labor Statistics (BLS) data, American Automobile Association (AAA) data, U.S. Department of Agriculture (USDA) data, financial assessment data collected by Palm Beach County’s Securing Our Future Initiative, and Emergency Rental Assistance (ERA) application data, we will also estimate how much money different types of LWB households expend on childcare, food, transportation, healthcare, and miscellaneous costs in a typical month. Using Pearce and Brooks’ (2001) *Self-Sufficiency Standard*, we will then calculate affordable rental rates for Lake Worth Beach based on these calculations (by household size).<sup>16</sup>

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<sup>16</sup> These grounded calculations of affordability are important, because many housing experts believe that HUD’s fair market rent and 30 percent benchmark overestimate the monthly payments that low-income households can afford after covering their other living expenses

Collectively, we anticipate compiling the following information into our report:

- Number and percentage of cost-burdened households
- Number and percentage of severely cost-burdened households
- Affordable rental rates in Lake Worth Beach based on household size and income level
- Number and ratio of current market listings that satisfy affordability standards
- Number and ratio of current market listings that qualify for federal housing assistance based on HUD Fair Market Rent

These figures will indicate the rents that Lake Worth Beach households can afford, how many residents are devoting an unsustainable portion of their earnings to housing costs, and whether low-income renters can fully utilize demand-side housing assistance programs such as Section 8 vouchers in the city.

- (6) **Payment Delinquency and Eviction Risk:** Drawing from the HPS, ERA application data, Emergency Utility Assistance (EUA) application data, PBC eviction filings, legal assistance application data from Florida Rural Services and Legal Aid of Palm Beach County, and other sources, we will estimate the number and ratio of households that are currently delinquent on their rent or mortgage; the number of evictions that the CDC's 2020-2021 eviction moratorium, and the county's federally funded emergency assistance programs, have prevented; and the number of LWB residents who face imminent risk of eviction in the near future.

In sum, we anticipate compiling the following information into our report:

- Number of residents who required Emergency Rental Assistance
- Number of residents who required Emergency Utility Assistance
- Number of residents who were served with eviction complaints
- Number of residents who received pro-bono legal aid related to eviction
- Number of residents who, in recent times, were delinquent on their rent or mortgage
- Number of residents who believe they are likely to be evicted in the near future

These data will allow us to estimate the number of local households who are at risk for eviction and utility disconnection due to being unable to cover their housing expenses. They will also us to forecast how expiration of the county's ERA program will affect the future incidence of eviction in Lake Worth Beach. These data are important, because they will provide insight into the ramifications of inaction once social supports are removed.

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(Stone 2006; PDR Edge 2017). By calculating them, we will be able to determine the monthly housing costs low-income and very low-income households can practically afford, compare these values to actual market conditions and fair market rent values, and assess whether existing housing conditions are meeting residents' needs.



- (7) **Need and Availability of Housing Support:** Drawing from Palm Beach County Housing Authority and Human Services data, we will assess whether government and non-government organizations across the city possess the resources that are needed to assist people facing housing insecurity. To do so, we will compare Housing Choice Voucher (Section 8) applications to approvals, shelter stay requests to approvals, and public/workforce housing applications to approvals. We will also draw from our interviews with housing agency leaders to assess their capacity for assisting vulnerable residents in the future and determine the resources they would need to maximize their effectiveness.

Lastly, we will draw from city and county records to assess the reach of current county and state programs oriented around facilitating ownership among low/moderate-income households—that is to say, whether price limits, financing options, and down payment assistance programs map onto the needs and capacities of low-income residents.

- (8) **Public Perception of Emergency:** Drawing from interviews with commissioners, interviews with community members, commentary on online neighborhood forums, local media stories about housing, and documented instances of housing-related activism (e.g., petitions, rallies), we will assess whether Lake Worth Beach residents subjectively perceive the presence of a housing emergency. These data are important, because collective perception of a crisis can amplify real estate speculation, rent hikes, and displacement. Future price expectations shape behavior and are a core driver of inflation. Therefore, determining whether emergency conditions are present must take public consciousness into account.

After collecting and analyzing these data, we will synthesize our findings into a report. Our report will detail—definitively and objectively—whether the city faces a “housing emergency,” whether existing housing arrangements meet residents’ needs and capacities, and how the city’s housing arrangements could be brought into line with residents’ needs and capacities.

**Methodology for Question #3: What effects have rising housing costs and changing housing market conditions had on the health, safety, and welfare of Lake Worth Beach residents? Do these effects pose a “serious menace to the general public?”**

Given that Florida Statute 166.043 requires local governments to demonstrate that housing conditions pose a “serious menace to the general public” before implementing rent stabilization, the City Attorney has requested guidance on whether such a menace is present, and whether rent stabilization is necessary and proper for controlling it. To answer these questions, our study will examine the effects that rising housing costs and changing housing market conditions have had on the health, safety, and welfare of Lake Worth Beach residents, and whether these effects rise to the level of a “serious menace to the general public.”

Although the nuances of our methodology will derive from the literature review we conduct for question #1, we anticipate examining the following factors when conducting our assessment and making our determination:

- (1) **Overcrowding:** Drawing on ACS data, we will analyze the extent of overcrowding in Lake Worth Beach by measuring the incidence and rate of households wherein more than one person lives in the same room. We will supplement these data with interviews to determine if, and how, price adaptations such as “doubling-up” are affecting the well-being of residents.<sup>17</sup>
- (2) **Eviction:** Using Palm Beach County court filings, we will tabulate the number of evictions that have occurred in the city over the past three years and estimate the city’s eviction rate. When doing so, we will control for the effects of the eviction moratorium and ERA program that were passed in 2020 and 2021. To do this, we will analyze evictions trends by month, denote months in which moratoriums were present, and compare monthly eviction tallies to the number of ERA applications/approvals that were filed during the corresponding period.

We will also analyze the responses that tenants have submitted to eviction notices, conduct interviews with selected tenants who have been evicted or who currently face eviction, and interview attorneys who regularly represent eviction clients in court. These data will provide insight into the reasons landlords are evicting, the circumstances under which evictions are occurring, and the outcomes residents who get evicted face.

The study will benefit from these data for two reasons. First, previous housing studies, such as Orange County’s *May 2022 Rent Stabilization Analysis* (GAI Consultants 2022), have raised doubts about the relationship between prices and eviction due to limited data collection efforts. By analyzing eviction cases, we can factually determine whether price appreciation has led, or is leading, to higher eviction rates across the city. Second, outcomes such as eviction would satisfy the criteria for “menace” in Florida’s rent control preemption clause, because researchers have shown that eviction is not simply a consequence of poverty, but a cause of it that also brings about adverse physical and mental health outcomes (Desmond 2016).

- (3) **Homelessness:** Drawing from Palm Beach County Human Services and School District data—including shelter intake records, shelter stay requests, McKinney-Vento Program surveys, and point-in-time counts—we will estimate the number of city residents who are literally homeless; living in a motel, car, shelter, park, or substandard dwelling; or sharing the housing of others due to financial hardship. We will then analyze how price spikes have affected these figures by examining how recent figures compare to historical trends.

We will supplement this analysis by conducting targeted interviews with leaders from agencies that assist people facing housing insecurity (e.g., Dare to Care, the Burrito Project, Adopt-a-Family, the Lord’s Place, Goodwill of Palm Beach County, and PBC Housing Authority). More importantly, we will interview people who are currently living in unconventional situations (e.g., cars, campers, or hotels), overcrowded conditions, and transient situations (i.e., couch-surfing). Together, these quantitative and qualitative data

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<sup>17</sup> This is one of the key measures the Census Bureau employs to estimate this phenomenon.

will provide insight into the causes and consequences of housing insecurity in Lake Worth Beach—including whether pricing has increased homelessness and/or damaged social security through other mechanisms.

- (4) **Displacement and Labor Shortages:** By conducting interviews with residents and realtors—and analyzing the content of housing-related stories in local media, housing-related posts in online neighborhood forums, and responses to eviction filings—we will study whether rising housing costs have forced people to leave the city. We will also conduct interviews with local businesses, government agencies, and non-profits to determine if rising housing costs have negatively affected their ability to recruit and retain workers. Finally, we will draw from ACS data, Decennial Census data, and PBC Schools data, to determine if rising housing costs have displaced students from local schools and/or pushed low-income households out of Lake Worth Beach neighborhoods.
- (5) **Gentrification and Neighborhood Change:** Drawing from ZORI data, ZHVI data, parcel data, school enrollment and homelessness data, and ACS / Decennial Census data at the tract and block group levels, we will identify the neighborhoods within the City of Lake Worth Beach where price appreciation has been most concentrated; examine the demographic and socioeconomic changes that price appreciation has caused in them; and chart differences in the absolute number and ratio of owner-occupied to rental housing units in them over time. Thereafter, we will conduct interviews with residents across different City neighborhoods to determine how housing market changes have impacted their feel and character.

We anticipate analyzing neighborhood-level changes over the past three to four years on the following metrics:

- Demographic characteristics (race, family type, and earnings)
- Household size
- Educational attainment
- Median gross rent
- Median home value

These data will allow to make inferences about the following questions:

- In what neighborhoods have property values and rents increased most rapidly?
- In what neighborhoods have property values remained stable?
- In what neighborhoods, if any, have property values declined?
- Which neighborhoods have experienced the most change?
- What neighborhoods are at risk for gentrification?
- Are housing conditions driving certain groups—for example, low-income households, minority households, or family households—out of their homes? Are members of such groups disenrolling from local schools and/or exhibiting higher rates of homelessness?

Collectively, these data will allow us to determine if rising housing prices are having a menacing effect on neighborhood stability, neighborhood character, and neighborhood schools.

- (6) **Crime:** Drawing on interviews with residents and law enforcement officers, we will examine whether rising housing costs, and the economic distress associated with them, have increased the prevalence of crime within the city.
- (7) **Secondary Effects on Health, Safety, and General Welfare:** To examine how changing housing market conditions have affected the health, safety, and welfare of Lake Worth Beach residents—and to determine whether housing costs constitute a “serious menace” to the public—we will interview a diverse cross-section of LWB residents about how their housing costs, living conditions, economic security, and general welfare have changed over the past several years. When selecting respondents, we will place emphasis on the following groups: residents who are cost-burdened, residents who have been displaced and/or rendered homeless, residents who have experienced problems with their landlords, social service/non-profit workers who have assisted individuals facing housing insecurity, and city officials who are actively working on housing issues (e.g., the commissioners, CRA board members, city staff, etc.).

To identify city residents who meet these criteria, we will employ the following recruitment methods:

- a. making contact with local non-profits that provide housing assistance, such as the Guatemalan-Maya Center, Florida Rural Services, Legal Aid Palm Beach County, and Adopt-a-Family
- b. canvassing of low-income rental neighborhoods
- c. utilizing contacts at the PBC Department of Human Services and PBC Housing Authority
- d. contacting local realtors
- e. reviewing public eviction records
- f. reviewing public comments made during LWB commission meetings (many residents have spoken about their hardships, and their names/addresses are available via the meeting recordings)
- g. reviewing signatories to and comments on the city-wide petition calling for declaration of a housing crisis state of emergency

- h. contacting LWB residents who have attended or plan to attend upcoming tenants' rights and tenants' town hall meetings
- i. contacting residents who are attempting to form tenant' unions in response to rent increases and poor living conditions
- j. reviewing social media posts about housing distress in local community groups
- k. utilizing snowball sampling based on the previous sources.

We will also monitor public/private meetings (e.g., commission sessions, neighborhood associations, and housing justice groups) and online neighborhood forums to determine how residents are talking about housing in the community. Our field observations will allow us to verify residents' interview claims and identify forms of exploitation and hardship that residents take for granted due to routinization.

After collecting and analyzing these data, we will write a detailed report documenting the effects rising costs and changing housing conditions have had on Lake Worth Beach residents. Our report will determine—definitively and objectively—whether these effects pose a “serious menace to the general public” by outlining the frequency of housing-related problems across the city (e.g., financial distress, emotional distress, inadequacy, gentrification, displacement, overcrowding, extortion, increase of rents without legal process, eviction, loss of permanent shelter, diminution of health, etc.), and by documenting the threats that housing conditions currently or will pose to residents.

**Methodology for Question #4: What are the underlying causes of the housing crisis in Lake Worth Beach?**

After assessing the secondary impacts that rising housing costs have had on the city and determining whether they constitute a “serious menace to the general public,” we will examine the causes of the housing crisis—that is to say, the primary factors that are driving rapid price appreciation, blocking access to housing, and undermining housing equity.

Although our analysis will ultimately be inductive, we will give special attention to how the following factors have impacted local housing conditions: (a) population growth, (b) real estate speculation, (c) the diffusion of short-term vacation rentals; (d) seasonal migration; (e) rising insurance rates; (f) local community redevelopment initiatives, growth management policies, and land development regulations; (g) county-level economic development and housing policy; and (h) macroscopic factors such as federal housing policy, supply chain disruptions, and inflation.

When conducting our analysis, we anticipate employing the following procedures:

- (1) **Population growth:** Drawing from ACS and Decennial Census data, we will compare recent rates of population growth to previous rates of growth to determine if they have contributed to rapid price appreciation.

(2) **Real Estate Speculation, Rental Appreciation, and Disinvestment:** Drawing from PAPA data, Zillow data, code enforcement records, and eviction records, we will analyze the characteristics of recent real estate transactions in Lake Worth Beach, and whether recent investment activities has affected the price, quality, and security of local rental units. We anticipate examining the following specific factors:

- Who has been purchasing properties in Lake Worth Beach (e.g., large commercial real estate firms, small landlords, individual homebuyers, etc.)
- What neighborhoods real estate speculation has been concentrated in
- Whether recently purchased properties are being used for occupancy, rentals, or speculation
- Whether certain landlord types (e.g., large real estate firms, small LLCs, etc.) are more likely to raise rents, impose extraneous fees, and/or evict
- Whether certain landlord types are more likely disinvest from their properties and/or violate city codes
- What groups have been most affected by real estate speculation

Collectively, these data will allow us to determine if speculation has substantially contributed to price appreciation, if it has reduced the quality and safety of rental units, and if it has contributed to social problems such as eviction and homelessness.

(3) **Short-term vacation rentals:** Drawing from proprietary data sources (e.g., the market research firm AirDNA), we will examine the incidence of short-term vacation rentals in the city, and we will map where they are concentrated in the city. We will compare these data to PAPA and Zillow data to determine if increased short-term vacation rental activity has contributed to cost appreciation. We will also examine where the effects of short-term vacation rentals have been concentrated.

(4) **Seasonal Migration:** Drawing from ACS data, we will examine trends in seasonal homeownership. Our analysis will estimate the number of seasonal residences in the city and how much seasonal residency has increased over time. We will attempt to identify if high rates of seasonal homeownership increase rents and sales values at the neighborhood level.

(5) **Rising Insurance Rates:** To gauge the effects of rising insurance rates on rents, we will conduct interviews with a sample of insurance brokers, real estate agents, and landlords. By populating a sample of cases, we will attempt to identify the degree to which landlords pass these costs onto renters. We will also draw from proprietary data sources (e.g., Policy Genius) to estimate the degree to which home insurances premiums have increased in Lake Worth Beach over the past several years.

(6) **Local development and land use policy:** To gauge how City-level policies have impacted housing conditions, we will review LWB's Strategic Plan, the CRA's

Redevelopment Plan, the CRA's Cultural Master Plan, and recent development projects the City has approved, denied, and/or proposed. We will then evaluate the policies by employing the Municipal Scorecard for Affordable Housing Delivery Model (FIU Metropolitan Center 2008) and summarizing their effects on housing conditions (i.e., to what degree do/have they protected tenants and homeowners, preserved existing affordable housing and neighborhoods, and facilitated the development of new affordable housing). We will supplement these data by interviewing members of relevant departments and agencies, including the CRA, commission, and Department of Community Sustainability.

- (7) **County-level economic development and housing policy:** To gauge how County-level economic development and housing policy has impacted local housing conditions, we will review the Housing and Future Land Use Elements of Palm Beach County's Comprehensive Plan, the HUD-Consolidated Plan for PBC, Palm Beach County's Consolidated Annual Performance and Evaluation Report, and the recent initiatives of the County's Business Development Board. We will then evaluate the policies by employing the Municipal Scorecard for Affordable Housing Delivery Model and summarizing their effects on local housing conditions (i.e., to what degree do/have they protected tenants and homeowners, preserved existing affordable housing and neighborhoods, and facilitated the development of new affordable housing).
- (8) **Macroscopic factors:** Drawing from recently housing policy scholarship, we will summarize the results of recent analyses of how macroscopic economic trends and federal housing policy have impacted housing conditions. Based on our findings, we will make inferences about how these macro-level factors have impacted local housing conditions.

In sum, we will provide a nuanced report on the origins of and contributing factors to the housing crisis and the primary impediments to improvement (including the production and renovation of housing units that serve low- and moderate-income households). While accounting for broader factors—including federal housing policy decisions and funding levels, to interest rates and inflation, to the investment strategies of private equity firms, to population trends, to problems in the insurance market—we will emphasize the role that county- and city-level programs/decisions have played. Because the city government has limited ability to influence the other factors, local knowledge will have greater utility for those who consume our report.

#### **Methodology for Question #5: Assessing Potential City Responses to Current Housing Conditions**

Housing experts have shown that creating a stable, secure, and affordable housing ecosystem requires four interrelated types of action. They have termed these actions the “four Ps” (Greenberg et. al 2021). First, government needs to *protect* people against unfair, illegal, exploitative, and hostile housing market conditions. Second, governments must *preserve* the existing stock of affordable housing in their community to protect residents against gentrification

and displacement. Third, areas with housing crises need to *produce* more housing—especially housing that accommodates the needs and budgets of low-income households. And fourth, governments need to give low-income households more *political* opportunity to advocate for their needs and relay their demands.

In this section of the report, we will recommend measures and ordinances that have the potential to improve housing conditions in Lake Worth Beach that address the four Ps in order of need and importance. We will base our recommendations on our research findings. Indeed, effectively responding to a housing emergency requires adequate understanding of its causes and consequences. For example, a preponderance of illegal evictions would signify the need for a right to counsel for individuals facing eviction. Substandard housing stock, dangerous living conditions, and landlord disinvestment would signify the need for code compliance officers to enforce land development regulations in a vigorous manner. Excessive fees and/or claims on security deposits would signify the need to better regulate leasing contracts. Widespread evidence of discrimination based on categories protected by the Fair Housing Act would signify the need to establish a local Office of Housing Advocacy to assist residents with filing complaints through the Office of Fair Housing and Equal Opportunity and the Florida Commission on Human Relations. And excessive rents/price gouging would signify the need for rent stabilization.

When developing our recommendations, we will also draw from the social scientific literature on housing security and housing policy—including the measures that other Florida municipalities have implemented to ameliorate housing problems—to ensure that they are supported by empirical evidence. The report we draft will rank our recommendations in terms of effectiveness, efficiency, and viability; project their anticipated effects on housing conditions; indicate the order in which they should be sequenced; detail the resources, data, and/or requirements that would be needed to implement them; and outline the timelines they would require to provide relief.

#### **Methodology for Question #6: Is a rent control ordinance necessary and proper for addressing the City's housing needs?**

In this final section of the report, we will draw on our collective data and findings to determine—definitively and objectively—whether a “housing emergency” is present; whether the emergency poses a “serious menace to the general public”; whether a rent control ordinance is therefore necessary, proper, and legal under current housing conditions; and whether such an ordinance is likely to withstand legal challenge.

When drafting our rent control ordinance analysis, we will also thoroughly review the literature on rent control to answer the following questions: What are the upsides? What are the downsides? In what ways could the city implement rent control (rent control, rent stabilization, how much stabilization, which rentals should be included and excluded, etc.)? What regulations on rents are advisable given the parameters that Florida state law has established?

When reviewing the literature and providing guidelines, we will attempt to compare apples to apples whenever possible—that is to say, when forecasting how rent control would affect



housing conditions in LWB, we will attempt to base our inferences on rent control policies that similar cities have enacted under similar circumstances.

### **Summary**

Rapidly appreciating prices, financial instability, rising rates of eviction and displacement, strained social service agencies, and anxiety among the public suggest that Lake Worth Beach's housing situation requires careful study and a prompt public response. We have thought deeply about the data and guidance city officials will need to formulate their response, are situated in the community, have a dynamic range of experiences, and are positioned to commence our research as soon as approval is granted. We are confident that the novel study we have proposed—which will combine multiple forms of data and employ mixed methods—will produce a far more detailed, and hence useful, report than the reports many similar municipalities facing housing crises have commissioned.

Our study will develop a comprehensive report that assesses Lake Worth Beach's housing conditions; outlines the causes and consequences of shortcomings in the housing system; explores how the commission can promote equity and affordability in relation to housing; establish how the commission can guarantee basic civil and political rights in relation to housing and give vulnerable and underrepresented groups more say over housing and development decisions that affect their lives; offer practical recommendations for ensuring that everyone in the city can access safe, affordable housing; and provide people and organizations within the city with concrete data and guidelines that be used to understand and develop effective responses to housing changes in South Florida and across the nation. And it will determine—definitively and objectively—whether a “housing emergency” is present, whether that emergency poses a “serious menace to the general public,” and whether measures such as rent control are necessary, proper, and legal under current housing conditions.

We are available to discuss this proposal at your convenience and eagerly await your response.

### **Budget and Timeline:**

We will complete all parts of this study by January 31<sup>st</sup>, 2024. However, we are willing to negotiate this timeline with the City and/or deliver results in phases.

We have outlined the anticipated budget for this study in the appended pricing sheet.

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EXHIBIT "A1"

RFP# 23-200 Housing Emergency Study and Rent Control Ordinance Analysis

PRICING FORM

Failure to fully complete and sign this Pricing Form may result in rejection of the Proposal.

HOURLY RATES

Position	Hourly Rates
Principal Investigator	\$ 70.87
Co-investigator	\$ 0
Co-investigator	\$ 0
Graduate research assistant	\$ 25
Graduate research assistant	\$ 25

HOURLY RATE SPECIFIC TO EXPERT WITNESS SERVICES

Position	Hourly Rates
Principal Investigator	\$ 70.87
Co-investigator	\$ 0

NOT TO EXCEED AMOUNTS  
(not to include expert witness services)

Tasks	Not to Exceed Amount
Completion of all Services as defined in the solicitation document as Part 1 of the Study (i.e., the housing emergency study)	\$ 50,000
Completion of all Services as defined in the solicitation document as Part 2 of the Study (i.e., the rent control ordinance analysis)	\$ 7,034.18

Name of Respondent: Philip Lewin, Florida Atlantic University

Address: 777 Glades Rd., CU 260, Boca Raton ST FL Zip 33431

Phone: (678) 770-8425 Email: Lewin p@fau.edu

Print Name: Philip Lewin Title: Associate Professor of Sociology

SIGNATURE: Philip Lewin Date: 1/26/23



### Cost Effectiveness

We will conduct this study as economically as possible. The cost estimates that we have budgeted for are listed below:

- Releases from two courses--one in the summer, and one in the fall--which will allow the principal investigator to repurpose his time from teaching to the City's housing study: \$22,678.20
- Hiring two graduate research assistants to work on the study for 10 hours per week, for 32 weeks, at a rate of \$25 per hour: \$16,000
- Eviction spreadsheets from the County Clerk for the past three years: \$1,164.80
- Interview transcriptions: \$3,750

Based on this budget, we anticipate that **total direct costs** associated with the study will amount to **\$43,593.00**. Unless RFPs specify otherwise, Florida Atlantic University requires that a 31 percent surcharge be added to research grants to cover the expenses associated with university facilities and administration, which amounts to **\$13,441.18** for **indirect costs**.

We anticipate spending most of our time conducting Part 1 of the study, given that our answer to Part 2 will depend on the results of Part 1. We thus anticipate that **Part 1** of the study will cost **\$50,000**, and that **Part 2** will cost **\$7,034.18**. Therefore, we anticipate our **total budget** for both studies, including direct and indirect costs, will not exceed **\$57,034.18**.

We have included a budget spreadsheet that further breaks down the anticipated costs associated with this study.



### **Successful Experience and Qualifications of Respondent and Staff**

If selected to conduct this study, we will complete all required tasks for Part 1 and Part 2 of the City's RFP by January 31, 2023. We are highly qualified to conduct the City's study, and to deliver the results in a timely manner, for two primary reasons. First, we are very familiar with, and already studying, housing conditions in Lake Worth Beach. In January 2023, we received three Community Engagement Grants from Florida Atlantic University (FAU) to study the degree to which the City's housing system is providing residents with a safe, secure, and affordable place to live, and to identify the main impediments to housing affordability and equity in Lake Worth Beach. Although we are in the early stages of our research, we have already begun to examine many of the questions the City's RFP addresses. Our preliminary research and connections to the community give us an advantage over other applicants.

Second, between the five of us, we have a dynamic range of research experience studying housing, community problems, urban development, and poverty. Professor Lewin has been studying community problems, particularly poverty, for more than a decade. His last major research project was a multi-year study that examined how energy market changes, mining-related pollution, population loss, government malfeasance, and opioid addiction were affecting a community in Central Appalachia. The purpose of the research was to document how the community was responding to these social problems and to produce knowledge that could be used to address them more effectively. In addition to winning an "outstanding dissertation" award, subsequent publications from the study have appeared in top journals, such as *Social Problems*.

Professor Lewin, who lives in Lake Worth Beach, became interested in housing issues several years ago due to personally witnessing the negative effects of rising prices around him. In Summer 2022, he instructed *Sociology of Housing*, which examined the causes and effects of the affordable housing crisis and gentrification in South Florida. He was also awarded a full-year course release to study the role that real estate speculation has played in the production and reproduction of socio-economic inequality in South Florida during the 2022-23 academic year. In December 2022, he gave a presentation at Palm Beach County's Economic Mobility Summit that discussed best practices for addressing housing barriers to advance family economic mobility.

Dr. Li has been teaching courses in housing for five years—specifically the graduate *Seminar in Housing* and the undergraduate course *Housing Policy and Planning*. Her teaching experience has equipped her with a comprehensive understanding of the housing market, U.S. housing policy, and various strategies for providing affordable housing. Dr. Li has also published peer-reviewed papers in top planning and housing journals, such as *Housing Studies*, *Housing Policy Debate*, and the *Journal of Planning Education and Research*. Her published papers have addressed topics such as the impacts of residential mortgage foreclosures on neighborhoods, foreclosure and affordable housing provision, and evaluation of the Moving to Opportunity program associated with the Section 8 Housing Choice Voucher program.

Dr. Li has also received over \$550,000 in grant funding to work on projects for local communities and research centers. She has worked on a land use assessment and TOD suitability

analysis project for Broward County, five different projects with the Village of Wellington, a study exploring the determinants of increased transportation crash risks in low-income neighborhoods in Orange County, and a project surveying the community satisfaction of residents in the communities of Abacoa, Heights of Jupiter, and West Palm Beach. These funding opportunities indicate that Dr. Li has substantial experience working on funded projects for local communities on issues related to housing and community development.

Carter Koppelman also teaches and researches in the fields of housing and urban development. His sociology courses, *The Urban Community* and *Urbanization*, introduce students to current research on urban development, poverty, and housing segregation, and they teach students how to conduct evidence-based analyses of segregation and gentrification in U.S. cities. His last major research project used longitudinal qualitative research to examine housing needs in poor and working-class neighborhoods, provision of affordable housing through government subsidy programs, and the social impacts of access to these programs. Data collection included 36 months of participant observation research and 120 qualitative interviews with precariously housed residents, members of neighborhood-based housing organizations, and residents of state-subsidized housing in Santiago, Chile and São Paulo, Brazil. Dr. Koppelman has published findings from his research in *Qualitative Sociology*, *Social Politics*, *Latin American Perspectives*, and *City & Community*.

Jodie Boisvert, who will work with us as a research assistant, holds an M.P.A. and is currently a Ph.D. student in FAU's Culture, Society, and Politics program. She has extensive research experience in housing and poverty reduction. While working for the Palm Beach County Department of Community Services, she was responsible for conducting mixed-methods research on poverty for the Securing Our Future Initiative and reviewing emergency rental assistance applications. She was also responsible for evaluating Palm Beach County poverty-reduction initiatives, including analyzing outcome measurements from over 100 county-wide programs, while working as a Community Investments Administrator and Grant Writer for United Way. She has additional research experience working for Children's Network of South Florida, the American Red Cross, and the International Rescue Committee. Annabelle Campbell, an FAU Ph.D. student who is carrying out her dissertation on the affordable housing crisis in South Florida, will work alongside her as a second research assistant.

As this document shows, we are connected to Lake Worth Beach, well acquainted with housing conditions within it, and have already begun addressing many of the City's questions through our Community Engagement Grants. We also have a wealth of combined experience. Professor Lewin and Professor Koppelman have employed qualitative research methods to study housing, poverty, and community problems from a sociological perspective, Professor Li has employed quantitative methods to study housing issues from an urban planning perspective, and Jodi Boisvert has employed mixed methods to conduct program evaluation. Our mixed-method, interdisciplinary approach to this study will produce a novel and uniquely helpful perspective on the City's housing dilemma.

**PROFESSIONAL EXPERIENCE**

- 2020 - Associate Professor (with tenure), Department of Sociology, Florida Atlantic University
- 2014 - 2020 Assistant Professor, Department of Sociology, Florida Atlantic University
- 2009 – 2014 Instructor of Record, Department of Sociology, University of Georgia
- 2006 – 2009 Graduate Teaching Assistant, Department of Sociology, University of Georgia

**EDUCATION**

- 2014 **Ph.D.** Sociology, University of Georgia  
**Dissertation:** “The Political Epistemics of the Rural Poor: Corruption, Coal, Conservatism, and Consent in Central Appalachia.”  
**Comprehensive Exam Area:** Work, Organizations & Occupations
- 2008 **M.A.** Sociology, University of Georgia  
**Thesis:** “In Search of the Real, Enamored with the Authentic: A Study of Ideology and Practice in Punk Subculture.”
- 2005 **B.A.** Sociology & Political Science, University of Georgia | Magna Cum Laude

**RESEARCH AND TEACHING FIELDS**

Community studies; poverty and economic development; political sociology; environmental sociology; qualitative research methods; cultural sociology; youth subcultures.

**SELECTED PUBLICATIONS**

- Lewin, Philip.** 2020. “Reaching the Boiling Point: Energy and Climate Policy under the Trump Administration.” Pp. 235-263 in *The Future of U.S. Empire in the Americas: The Trump Administration and Beyond*, edited by Timothy M. Gill. New York, NY: Routledge.
- Lewin, Philip.** 2019. “‘I Just Keep My Mouth Shut’: The Demobilization of Environmental Protest in Central Appalachia.” *Social Currents* 6(6): 534-552.
- Lewin, Philip.** [2017] 2019. “‘Coal is not just a Job; It’s a Way of Life’: The Cultural Politics of Coal Production in Central Appalachia.” *Social Problems* 66(1): 51-68.
- Lewin, Philip.** 2017. “Fighting King Coal: The Challenges to Micromobilization in Central Appalachia.” *Contemporary Sociology* 46(6): 657-65. (Book review essay).
- Lewin, Philip.** 2016. “The Public Engagement Industry and the Future of Democratic Praxis.” *Trajectories* 28(1): 26-30. (Book review essay).
- Lewin, Philip.** 2014. “Political Participation, Demobilization, and the Problem of Community Embeddedness.” *States, Power and Societies* 20(1): 1-6.

**SELECTED GRANTS AND FELLOWSHIPS**

- 2022 *FAU Community Engagement Grant.* \$1,000. Project: “Assessing the Social Impacts of the National Housing Emergency in Lake Worth Beach, FL.”
- 2022 *FAU Sabbatical.* Full year course release. Project: “Studying Poverty and Profit in the South Florida Housing Market.”
- 2019 *Bill and Melinda Gates Foundation – Grand Challenges –Voices for Economic Opportunity Initiative* (\$100,000). Not funded. PI: Philip Lewin. Project: “The Visible Injuries of Class.”
- 2016 *FAU Scholarly and Creative Accomplishment Fellowship.* Fall semester teaching release. Project: “Forgotten People: The Invisible Suffering of the Rural Poor.”
2013. *Dissertation Completion Award.* \$12,965. University of Georgia Graduate School. Project: “The Political Epistemology of the Rural Poor.”
2012. *Innovative and Interdisciplinary Research Grant.* \$1,000. University of Georgia Graduate School. Project: “The Social and Moral Order of Rural Poverty.”

**SELECTED PRESENTATIONS, PROCEEDINGS, AND COLLOQUIA**

- “Best Practices for Addressing Housing Barriers to Advance Family Economic Mobility.” Securing Our Future Economic Mobility Summit. West Palm Beach, FL. December 2022.
- “The Anti-Environmental State: Managing Toxic Grievances in Central Appalachia.” Annual Dimensions of Political Ecology conference. Lexington, KY. February 2020.
- “The Visible Injuries of Class: How Structural Violence and Stigmatization Affect the Rural Poor.” Annual meeting of the American Sociological Association. New York, NY. August 2019.
- “Local Responses to Climate Change in an Age of Nationalism and Isolationism.” Annual meeting of the Southern Sociological Association. New Orleans, LA. April 2019.
- “‘It’s not about Policy; It’s about Personality’: How Rural Political Machines Produce Legitimacy.” Annual meeting of the American Sociological Association. Montreal, CA. August 2017.
- “Living at the Bottom, Voting for the Top: The Politics of the Rural Poor in Central Appalachia.” Oakland University’s colloquium series. Rochester, MI. November 2016.
- “The Political Epistemology of the Rural Poor.” Annual meeting of the American Sociological Association. Seattle, WA. August 2016.
- “The Politics of the Socially Excluded at the Dawn of the 21<sup>st</sup> Century.” Annual meeting of the Social Science History Association. Baltimore, MD. November 2015. (with Phillip Hough).
- “‘Coal is not just a Job; It’s a Way of Life’: The Cultural Politics of Coal Production in Central Appalachia.” American Sociological Association. Chicago, IL. August 2015.

**TEACHING*****Graduate Courses Taught at Florida Atlantic University***

Political Economy of Culture.	Spring 2015 – present.
Advanced Qualitative Research Methods.	Spring 2016 – present.
Critical Perspectives in Social Theory.	Spring 2021 – present.

***Undergraduate Courses Taught at Florida Atlantic University and University of Georgia***

Youth Subcultures.	Fall 2009 – present.
Sociology of Work and Industry.	Summer 2010 – present.
Cultural Sociology.	Spring 2010 – present.
Sociological Theory.	Fall 2015 – present.

***Selected Independent Studies***

Sociology of Housing	Summer 2020
Creative Tourism and the Gentrification of Wynwood, Miami	Spring 2015

**SELECTED PROFESSIONAL SERVICE ACTIVITIES****Academic Positions**

- Program Committee - History of Sociology and Social Thought Section – American Sociological Association. Summer 2022 – present.
- Chair of College of Arts and Letters’ Undergraduate Programs Committee. Spring 2022.
- Director of Undergraduate Program. Sociology Department. Spring 2019 - Spring 2022.
- Chair of Writing Enhanced Curriculum Program. Sociology Department. Fall 2019 - Spring 2022.
- Sociology Steward to United Faculty of Florida Union. Spring 2019 - present.
- Moderator of FAU Workshop on Sociological Research. Fall 2014 to Spring 2022.
- Associate Editor – *Qualitative Sociology*. Fall 2013 - Summer 2014.

**Academic Reviewing**

Occasional reviewer for: *Environmental Justice*, *Socius*, *Journal of Appalachian Studies*, *American Journal of Sociology*, *Social Forces*, *American Sociological Review*, *Social Problems*, *Sociological Forum*, *Sociological Perspectives*, *Environmental Sociology*, *Sociology Compass*, *Contemporary Sociology*, *Journal of Rural Social Sciences*, *Qualitative Sociology*, *The International Journal of English and Literature*, *Social Thought and Research*, *The Journal of Contemporary Ethnography*.

## **YANMEI LI, Ph.D., AICP**

Associate Professor

Department of Urban and Regional Planning

Florida Atlantic University

[yli22@fau.edu](mailto:yli22@fau.edu)

561-297-4282

Full CV: <http://science.fau.edu/departments/urban-regional-planning/documents/yanmei-cv.pdf>

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### **EDUCATION**

- Ph.D. 2006. City and Regional Planning, The Ohio State University, Columbus, OH, USA.  
*Dissertation: The Dynamic Interaction between Residential Mortgage Foreclosure, Neighborhood Characteristics and Changes*
- M.A. 2001. Economics - Regional Economics, Beijing Normal University, Beijing, China.  
*Thesis: The Spatial Distribution and Optimal Scale of Rural Migrants in Beijing*
- B.S. 1998. Geography, East China Normal University, Shanghai, China.  
*Thesis: The Characteristics and Development Strategies of Hi-tech in Changjiang Delta*

### **SELECTED WORKING EXPERIENCE**

- Associate Professor. 2014- . Department of Urban and Regional Planning, Florida Atlantic University
- Assistant Professor. 2008-2014. School of Urban and Regional Planning, Florida Atlantic University
- Assistant Professor. 2006-2008. Department of Geography and Geology, Western Kentucky University

### **RESEARCH & SCHOLARSHIP**

#### **Selected Peer Refereed Publications in Print**

- Li, Yanmei, and Sumei Zhang. 2022. *Applied Research Methods in Urban and Regional Planning*. Springer.
- Li, Yanmei, and Sumei Zhang. 2020. Social capital as a predictor of neighborhood satisfaction: an analysis of American Housing Survey national data. *Housing and Society*. First published online September 12, 2020. DOI: 10.1080/08882746.2020.1813516
- Anacker, Katrin, and Yanmei Li. 2016. Analyzing housing affordability of renters during the Great Recession 2007 to 2009. *Housing and Society*, 43(1): 1-17. DOI: 10.1080/08882746.2016.1160556
- Walter, Rebecca J., Yanmei Li, and Serge Atherwood. 2015. Moving to opportunity? An examination of Housing Choice Vouchers on urban poverty deconcentration in South Florida. *Housing Studies*, 30(7): 1064-1091. DOI: 10.1080/02673037.2015.1009004.
- Li, Yanmei, and Rebecca Walter. 2013. Single-family housing market segmentation, post-foreclosure resale duration, and neighborhood attributes. *Housing Policy Debate*, 23(4): 643-665.
- Gibson, Huston, and Yanmei Li. 2013. Opportunities for the United States condominium foreclosure market to provide amenable affordable housing options: The case of Tampa/Hillsborough, Florida. *Urbani Izziv*, 24(1): 90-106 (in English and Slovene).
- Li, Yanmei. 2011. Subprime lending and neighborhood characteristics: Spatial patterns by loan category. *Housing and Society, Journal of the Housing Education and Research Association*, 38 (1): 83-116.

**Li, Yanmei**, and Hazel Morrow-Jones. 2010. The impact of residential mortgage foreclosure on neighborhood change and succession. *Journal of Planning Education and Research*, 30(1): 22-39.

### **Selected Grants**

- Principal Investigator. 2023. *Best Practice Affordable Housing Policies and Programs for the South Florida Region*  
Grantor: Florida Atlantic University Community Engagement Project Grant, \$990
- Co-Principal Investigator. 2018-2019. *Understanding the Crash Risk Exposure of Low-income Households and Neighborhoods* (with Eric Dumbaugh, PI).  
Grantor: Collaborative Sciences Center for Road Safety, United States Department of Transportation, \$68,314.
- Principal Investigator. 2019. *South Florida Community Satisfaction Survey*. (with John Renne and Lilah Besser)  
Grantor: Center for Urban and Environmental Solutions, Florida Atlantic University, \$20,000
- Co-Principal Investigator. 2011-2012, 2012-2013. *Wellington 2060 Living Laboratory*. (with Ceylan Oner (PI) and Jaap Vos (2012-2013)/ Ceylan Oner and Jaap Vos (PI) (2011-2012)). A series of five projects: Economic Inventory Analysis, Business Inventory Analysis, Equestrian Planning Survey, Redevelopment Planning of Transitional Neighborhoods, and Community Satisfaction Survey  
Grantor: Village of Wellington, FL, \$252,083
- Co-Principal Investigator. 2010-2011. *Transit-Supportive Infrastructure and Land Use Study - Mid-Town Plantation and Southwest Sunrise*, Broward County, Florida. (with Anthony Abbate (PI) and Michele Hawkins).  
Grantor: Broward Metropolitan Planning Organization (MPO), \$150,000
- Principal Investigator. 2010-2011. *Housing Policy Responses to Climate Change: Planning and Practice*. (Mentor: Alka Sapat)  
Grantor: Florida Atlantic University, \$2,000

### **Selected Service Projects in Local Communities**

- Board Member. Town of Jupiter Historic Resources Board (2018, 2019)
- Community Service. The City of North Miami Transit-Oriented Development (TOD) Visioning and Master Plan (Fall 2014)
- Community Service. Ft. Lauderdale Urban League Redevelopment Project Planning (via Carras Community Investment, Inc.) (Spring 2013)
- Community Service. South Florida Community Land Trusts (CLTs) Property Development Plan and Neighborhood Visioning (Spring 2013)
- Community Service. Lauderdale Lakes Town Center Market Analysis (Fall 2012)
- Community Service. North Bay Village Commercial Corridor Planning (Fall 2012)
- Community Service. Himmarshee Village Visioning (Spring 2012)
- Community Service. City of Opa-locka Community Redevelopment Planning (Spring 2012)
- Community Service. City of Opa-locka Community Redevelopment Planning (Spring 2011)
- Community Service. MiMO (Miami Modern District) Redevelopment Planning (Spring 2010)
- Member, Comprehensive Plan Update Task Force, City of Bowling Green / Warren County, KY (2007-2008)



**PROFESSIONAL EXPERIENCE**

**Assistant Professor of Sociology**  
Florida Atlantic University

January 2019-Present

**EDUCATION**

- Ph.D., Sociology. University of California, Berkeley** 2018  
Dissertation: "‘Property Owners and Not Proletarians’: Housing Policy and the Contested Production of Neoliberal Subjects in Chile and Brazil"  
Qualifying Exam Fields: Social Theory, Development, Political Sociology
- M.A., Sociology. University of California, Berkeley** 2011  
Thesis: "Symbolic Power and Municipal Governance: The State-Society Interface in the *Poblaciones* of Santiago, Chile"
- B.A., International Relations and Latin American Studies. Tufts University** 2009

**RESEARCH & TEACHING FIELDS**

Urban Sociology, Housing, Political Economy, Political Sociology, Development, Globalization, Social Policy, Gender, Qualitative Methods, Latin America

**PUBLICATIONS****Peer-Reviewed Articles**

- Koppelman, Carter. 2022. "Empowered Homeowners, Responsible Mothers: Promises and Pitfalls of Maternalist Housing Provision in Brazil’s *Minha Casa Minha Vida* Program." *Social Politics* 29(4): 1449-1473.
- Koppelman, Carter. 2021. "Inclusion in Indignity: Seeing the State and Becoming Citizens in Chile’s Social Housing." *Qualitative Sociology* 44(3): 385-402.
- Koppelman, Carter. 2018. "‘For now, we are in waiting’: Negotiating Time in Chile’s Social Housing System." *City & Community* 17(2): 504-524.
- Koppelman, Carter. 2017. "Deepening Demobilization: The State’s Transformation of Civil Society in the *Poblaciones* of Santiago, Chile." *Latin American Perspectives* 44(3): 46-63.

**Book Reviews**

- Koppelman, Carter. 2019. "Alexander, CJ and Tognato, C.(eds) *The Civil Sphere in Latin America*. 2018. Cambridge University Press." *The British Journal of Sociology* 70(4): 1628-1631.

**GRANTS, FELLOWSHIPS & AWARDS**

- Community Engagement Project Grant, Florida Atlantic University 2022
- Peace, Justice, and Human Rights Research Grant, Florida Atlantic University 2022-2023
- Americas Initiative Fellowship, College of Arts & Letters, Florida Atlantic University 2022
- Troy Duster Fellowship, Department of Sociology, UC Berkeley 2018
- Leo Lowenthal Fellowship, Department of Sociology, UC Berkeley 2015
- National Science Foundation Graduate Research Fellowship 2010-2013
- John S. Gibson Award, Best Undergraduate Thesis in International Relations, Tufts University 2009

## RESEARCH PRESENTATIONS

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### Selected Academic Conference Presentations

- “Accumulation by Inclusion: Politics, Profit, and Social Housing Provision in Latin America.” Development Section Regular Session. American Sociological Association Meeting. Los Angeles. August 2022.
- “Conflictive Clients and Peripheral Partners: Popular Participation in Market-Driven Housing Programs in Chile and Brazil.” Development Section. ASA Annual Meeting. Philadelphia, PA. August 2018.
- “Subsidized Housing and Single Motherhood: Effects and Limits of Women’s Inclusion in Low-income Housing Policies in Chile and Brazil.” Cities and Urban Studies Track. Latin American Studies Association Congress. New York, NY. May 2016.
- “*En Espera*: Negotiating Time in Chile’s Social Housing System” Ethnography Section. ASA Annual Meeting. Chicago, IL. August 2015.
- “Resource Access and the Municipal Structuring of the Local-Organizational Field in the *Poblaciones* of Santiago, Chile.” Southern Cone Section. LASA Congress, Toronto, ON. November 2010.

### Invited Talks

- “Accumulation by Inclusion: Politics, Profit, and Social Housing Provision in Latin America.” Colloquium of the Department of Global & Sociocultural Studies. Florida International University. Sept. 2022.
- “*La Reina de la Casa*: Gendered Urban Citizenship and Access to Social Housing in La Pintana.” Emergent Citizenships Colloquium. Institute of Urban and Territorial Studies. Universidad Católica de Chile. Santiago, Chile. November 2013.

## TEACHING

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### Undergraduate Courses Taught at Florida Atlantic University

Sociological Theory (required core course)	Spring 2019 - Present
Global Social Change (upper-level capstone course)	Fall 2019 – Present
The Urban Community (elective course)	Fall 2020 - Present

### Graduate Courses Taught at Florida Atlantic University

Seminar in Urbanization	Fall 2019 - Present
Seminar in Globalization & Development	Spring 2019 - Present

## PROFESSIONAL ACTIVITIES

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### Academic Reviewing

- Occasional Reviewer, *American Sociological Review*
- Occasional Reviewer, *Qualitative Sociology*
- Occasional Reviewer, *City & Community*

### Professional Memberships

- American Sociological Association
- Sections on Community and Urban Sociology, Political Sociology, Development, and Sex & Gender

### Other

- Visiting Researcher, College of Architecture and Urbanism, University of São Paulo 2014

## LANGUAGES

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- Portuguese (fluent speaking, reading and writing)
- Spanish (fluent speaking, reading and writing)
- English (native speaker)

**Jodie Marie Boisvert, MPA  
Program Officer, Research  
International Rescue Committee**

**Education**

Current Student	PhD Comparative Studies Florida Atlantic University
2017	Masters of Public Administration Degree Florida Gulf Coast University Capstone: <i>"Sustainability for a Small, Grassroots Non-profit Organization in Palm Beach County"</i>
2010	Bachelors Degree in Anthropology University of South Florida

**Professional Employment**

2022-Present	Program Officer, Research International Rescue Committee  -Responsible for conducting research on refugee resettlement programs and practices that are intended to lead to the best possible outcomes for refugee neighbors.
2020-2022	Program Evaluator Palm Beach County Board of County Commissioners  -Responsible for the Securing Our Future Initiative which led the poverty reduction efforts for Palm Beach County. This included conducting original mixed-methods research on poverty-related needs in Palm Beach County. In addition to research and program management, I was responsible for reviewing and approving/denying ERA rental assistance applications during the pandemic.
2020-Present	Owner   Director of Grants and Public Relations GrantFuzion  -Responsible for grant writing and managing the company.
2018-2020	Senior Volunteer Engagement Specialist American Red Cross  -Responsible for leading the research and evaluation efforts that were designed to improve volunteer engagement. Projects

	included mixed-methods approaches including interviews, focus groups, and primary quantitative data collection.
2018-2020	Director and Grants and Programs Suits for Seniors  -Responsible for grant writing.
2017-2018	Community Investments Administrator and Grant Writer United Way of Palm Beach County  -Responsible for evaluating poverty-reduction initiatives throughout Palm Beach County. This included analyzing outcome measurements from over 100 county-wide programs.
2016-2017	Grant Writer United Way of Palm Beach County  -Responsible for grant writing.
2015-2016	Teen Outreach Program® Coordinator and Grant Writer Children's Network of Southwest Florida  -Responsible for managing a poverty-reduction, youth-leadership program. This included conducting independent, mixed methods research including interviews and primary quantitative data collection.
2013-2015	Teen Outreach Program® Facilitator Children's Network of Southwest Florida  -Facilitated a poverty-reduction, youth-leadership program.

### **Publications**

#### **Pending Articles**

2023	<i>Norwegian Immigrant Unemployment - A Quantitative Study</i>
2023	<i>The impact of white supremacy on xenophobia in the United States in the 21st century.</i>

#### **Forum Presentations**

2022	Norwegian Immigrant Unemployment: A Quantitative Study SPSSI
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# Annabelle Campbell

711 NW 7th Street Boynton Beach, FL 33426  
772-766-6086 • annabellecam2013@fau.edu

## Education

**PhD in Comparative Studies, Culture Society & Politics** - IP, Florida Atlantic University

**Master of Business Administration** - August 2018, Florida Atlantic University

**Bachelor of Arts in Political Science** - May 2015, Florida Atlantic University

Minors: Spanish Language and Arabic Language  
Magna Cum Laude

## Teaching Experience

**Graduate Teaching Assistant, Intro to World Politics** August-December 2020 Florida Atlantic University, Boca Raton, FL

- Facilitated and monitored simultaneous in-person and Zoom lectures
- Developed lectures on the topics of media and the environment in respect to international relations
- Graded written assignments and assisted students with developing a deeper understanding of course material
- Developed weekly quiz questions on core concepts from lectures and assigned readings/content

**Graduate Teaching Assistant, Law and American Society** May-August 2020 Florida Atlantic University, Boca Raton, FL

- Monitored online lectures via WebEx
- Graded written assignments using Canvas

**Graduate Teaching Assistant, Comparative Politics of the Middle East** January - May 2020 Florida Atlantic University, Boca Raton, FL

- Attended lectures and assisted students individually with course topics
- Graded mid-term and final essay examinations
- Graded final research paper

**Graduate Teaching Assistant, Religion & World Politics** January - May 2020 Florida

- Attended lectures and assisted students individually with course topics
- Graded midterm and final essay examinations

**Graduate Teaching Assistant, Religion & World Politics** August - December 2019 Florida Atlantic University, Boca Raton, FL

- Attended lectures and assisted students individually with course topics
- Graded midterm and final essay examinations

## **Professional Experience**

### **Marketing Manager**

*Aerospace Marketing Group- Delray Beach, FL (December 2017- August 2019)*

- Created and managed email campaigns for various trade shows and advertising options
- Created proposals to showcase various advertising options
- Worked with companies/agencies to determine short term and long term marketing strategies
- Represented Aviation Week Network at global tradeshow and networking events

### **Marketing Coordinator**

*Aerospace Marketing Group- Delray Beach, FL (December 2016-December 2017)*

- Managed *Inside MRO* advertising production cycle- print and digital
- Managed Metric Reporting
- Represented Aviation Week Network at global trade shows
- Achieved a 95% submission rate for advertising materials

### **Operations Assistant**

*Import Solutions- Jupiter, FL (December 2014-July 2016)*

- Communicated with factories abroad and buyers domestically
- Managed the spare parts department effectively and reduced order error
- Created weekly open order reports and cost sell advertising sheets
- Facilitated the import process for buyers

EXHIBIT "D"

RFP# 23-200 Housing Emergency Study and Rent Control Ordinance Analysis

SIMILAR PROJECTS

List two (2) similar projects successfully completed in the past five (5) years by the individual, university, firm, or project manager, etc. assigned to the project.

Completed Project #1:

Agency/company: University of California, Berkeley  
Current contact person at agency/company: Raka Ray, Ph.D.  
Telephone: (510) 642-9565 Fax: N/A E-mail: rakaray@berkeley.edu  
Address of agency/company: 460 Social Sciences Building, Berkeley, CA 94720-1980  
Name of project: Social Impacts of Subsidized Housing Programs in Chile and Brazil  
Description: See description on next page.

Project value: ~ \$100,000 Start date: Summer 2010 Completion date: December 2022  
(month/year) (month/year)

Name(s) of assigned personnel:

Project manager: Center Koppelman  
Others: Raka Ray, Lorna Enriquez, Marc Lerman, Teresa Collier, Colvin

Completed Project #2:

Agency/company: Collaborative Science Center for Road Safety  
Current contact person at agency/company: Eric Dumbach, Ph.D.  
Telephone: (561) 666-8840 Fax: N/A E-mail: edumbach@fsu.edu  
Address of agency/company: 777 Glades Rd, Boca Raton, FL 33431  
Name of project: The Influence of the Built Environment on Crash Risk in  
Description: Lower-Income and Higher-Income Communities  
See description on following page.

Project value: \$68,314 Start date: April 2018 Completion date: January 2021  
(month/year) (month/year)

Name(s) of assigned personnel:

Project manager: Erik Dumbach  
Others: Yanmei Li

## Similar Projects

### Completed Project #1

**Agency/company:** University of California, Berkeley

**Current contact person at agency/company:** Raka Ray (faculty advisor)

**Telephone:** (510) 642-9565

**Fax:** (510) 642-0654

**Email:** [rakarav@berkeley.edu](mailto:rakarav@berkeley.edu)

**Address of agency/company:** 410 Social Sciences Building, Berkeley CA 94720-1980

**Name of Project:** Study on Social Impacts of Subsidized Housing Programs in Chile and Brazil (2010-2022).

**Description:** This study, which was initiated as a doctoral thesis project in Sociology at the University of California, Berkeley, used longitudinal qualitative research to examine housing needs in poor and working-class neighborhoods, provision of affordable housing through government subsidy programs, and the social impacts of access to these programs. Data collection included 36 months of participant observation research and 120 qualitative interviews with precariously housed residents, members of neighborhood-based housing organizations, and residents of state-subsidized housing. Data collection occurred over eight years (2010-2017) in two cities, Santiago, Chile, and São Paulo, Brazil. Data analysis and publication of results occurred from 2018-2022.

Questions addressed by the study include:

- What are the impacts of different forms of inadequate or precarious housing (rent burden, overcrowding, houselessness, and illegal squatting) on family relations, economic opportunities, community support networks, and subjective well-being?
- How do individuals learn about and decide to apply for state-sponsored affordable housing programs?
- How do bureaucratic application processes, waitlists, and other barriers to access affect the precariously housed and shape their survival strategies and subjective well-being?
- What are the effects of receiving government-subsidized housing on family relations, economic opportunities, community support networks, and subjective well-being?
- What are the gender-specific impacts on low-income women and single mothers, who are overrepresented both among the precariously housed and recipients of government housing support in Chile and Brazil?
- How do precariously housed people themselves understand what constitutes “adequate” or “dignified” housing? To what extent are these understandings met by government housing programs?

Research findings from this study have been reported in the following publications:

Koppelman, Carter. 2022. “Empowered Homeowners, Responsible Mothers: Promises and Pitfalls of Maternalist Housing Provision in Brazil’s Minha Casa Minha Vida Program.” *Social Politics* 29(4): 1449-1473.



Koppelman, Carter. 2021. "Inclusion in Indignity: Seeing the State and Becoming Citizens in Chile's Social Housing." *Qualitative Sociology* 44(3): 385-402.

Koppelman, Carter. 2018. "'For now, we are in waiting': Negotiating Time in Chile's Social Housing System." *City & Community* 17(2): 504-524.

**Project Value:** \$100,000 (combined value of National Science Foundation grant, Leo Lowenthal Fellowship, and Troy Duster Fellowship, and Americas Initiative Fellowship)

**Start date:** Summer 2010

**Completion date:** December 2022

Names of assigned personnel

**Project manager:** Carter Koppelman

**Others:** Raka Ray, Laura Enriquez, Mara Loveman, Teresa Caldeira (advisors)

## **Completed Project #2**

**Agency/company:** Collaborative Sciences Center for Road Safety (funded through the U.S. Department of Transportation) at FAU. FAU is a consortium member.

**Current contact person at agency/company:** Dr. Eric Dumbaugh

**Telephone:** 561-666-8840

**Fax:** N/A.

**Email:** [edumbaugh@fau.edu](mailto:edumbaugh@fau.edu)

**Address of agency/company:** 777 Glades Rd., Boca Raton, FL 33431

**Name of Project:** The Influence of the Built Environment on Crash Risk in Lower-Income and Higher-Income Communities.

**Description:** During 2019 and 2021, Dr. Yanmei Li was a Co-PI working on exploring the determinants of increased transportation crash risks in low-income neighborhoods in Orange County, Florida. This project was funded by the Collaborative Science Center for Road Safety (CSCRS) with funding from the U.S. Department of Transportation.

**Project Value:** \$68,314

**Start date:** April 2018

**Completion date:** January 2021

Names of assigned personnel

**Project manager:** Eric Dumbaugh

**Others:** Yanmei Li

## References

### Reference #1

**Name of Client:** Florida Atlantic University Department of Sociology

**Address:** 777 Glades Road, Culture and Society Building (CU) room 253, Boca Raton, FL 33431

**Phone:** (561) 297-3270

**Fax:** (561) 297-2511

**Contact Person:** Ann Branaman, Ph.D.

**Title:** Department Chair and Professor

**Description of Services:** Dr. Lewin and Dr. Koppelman have worked as professors in the Sociology Department since 2014 and 2019, respectively. During that time, they have been responsible for teaching courses in their areas of expertise, conducting empirical research, giving research presentations, publishing research papers, applying for grant funding, and supervising student research.

### Reference #2

**Name of Client:** Florida Atlantic University Department of Urban and Regional Planning

**Address:** Department of Urban & Regional Planning, Florida Atlantic University, 777 Glades Road, SO 284 Boca Raton, FL 33431

**Phone:** 561-297-4279

**Fax:** N/A.

**Contact Person:** Jesse Saginor, Ph.D.

**Title:** Department Chair and Professor

**Description of Services:** Dr. Li has worked as an Associate Professor in the Department of Urban and Regional Planning at Florida Atlantic University since 2008. As an Associate Professor, she has been responsible for teaching courses on housing and urban planning, conducting empirical research, giving research presentations, publishing research papers and reports, applying for grant funding, and working on extramural projects.

### Reference #3

**Name of Client:** Center for Urban and Environmental Solutions (CUES)

**Address:** Center for Urban and Environmental Solutions, Florida Atlantic University, 777 Glades Road, SO 284 Boca Raton, FL 33431

**Phone:** 561-297-4279

**Fax:** N/A.

**Contact Person:** John Renne, Ph.D.

**Title:** Director and Professor

**Description of Services:** Between 2020 and 2022, Dr. Li worked as a PI on a Community Satisfaction Survey project funded by the Center for Urban and Environmental Solutions (CUES) at Florida Atlantic University, focusing on surveying the community satisfaction of residents in the communities of Abacoa, Heights of Jupiter, and West Palm Beach historic neighborhoods.

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**Default, Termination, Litigation, Debarment, etc.**

None of the personnel applying for this study have been subject to any default, termination, litigation, or debarment during the past five years.

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EXHIBIT "B"

RFP# 23-200 Housing Emergency Study and Rent Control Ordinance Analysis

CITY CAMPAIGN CONTRIBUTION STATEMENT

This RFP is subject to Section 2-101 of the City of Lake Worth Beach Code of Ordinances regarding campaign contributions which provides:

**Sec. 2-101. - Additional and supplemental disclosures requirements.**

- (a) Any elected official of the City of Lake Worth Beach, who is a current sitting member of the city commission and has accepted an election campaign contribution in an amount that is more than one hundred dollars (\$100.00) from an individual or business entity having an interest in a matter before the city commission in which the city commission will take action, must publicly disclose, both verbally and in writing, such contribution prior to any discussion or vote on the matter. The written disclosure must be submitted to the city clerk.
- (b) Any applicant coming before the city commission for an award of a contract with the city and who has made an election campaign contribution in an amount that is more than one hundred dollars (\$100.00) to any elected official of the city commission, who is a current sitting member of the commission, must disclose such election campaign contribution, verbally and in writing, during the application or bidding process and before the award of the contract.

**Respondent to complete:** Check which statement applies, fill in the requested information, if applicable, and sign below.

Neither the undersigned business nor any of its owners or officers contributed more than \$100.00 to the campaign of a sitting City Commission member. [If you checked this statement, you are done and may sign below.]

The undersigned business or one or more of its owners or officers contributed more than \$100.00 to the campaign of a sitting City Commission member. All such contributions are listed below and on the attached sheet of paper (if more room is needed). [If you checked this statement, please fill in the information requested below and sign below.]

- 1. \_\_\_\_\_ contributed a total of \$\_\_\_\_\_ to the campaign of City Commission member \_\_\_\_\_.
- 2. \_\_\_\_\_ contributed a total of \$\_\_\_\_\_ to the campaign of City Commission member \_\_\_\_\_.
- 3. \_\_\_\_\_ contributed a total of \$\_\_\_\_\_ to the campaign of City Commission member \_\_\_\_\_.
- 4. \_\_\_\_\_ contributed a total of \$\_\_\_\_\_ to the campaign of City Commission member \_\_\_\_\_.

**Signature:**

I hereby certify that the above statements are true and correct to the best of my knowledge and I understand that a false or inaccurate statement may result in the rejection of this bid/proposal/submittal or the immediate termination of any resulting agreement with the City of Lake Worth Beach.

By: PLC

Print Name: Philip Lewin

Print Title: Associate Professor of Sociology

Print Name of Business: Florida Atlantic University

**Commissioner/Mayor to complete:** Check which statement applies, fill in the requested information, if applicable, and sign below.

Neither the above referenced business nor any of its owners or officers contributed more than \$100.00 to my campaign. [If you checked this statement, you are done and may sign below.]

The above referenced business or one or more of its owners or officers contributed more than \$100.00 to my campaign. All such contributions are listed below and on the attached sheet of paper (if more room is needed). [If you checked this statement, please fill in the information requested below and sign below.]

_____	contributed a total of \$ _____	to my campaign.
_____	contributed a total of \$ _____	to my campaign.
_____	contributed a total of \$ _____	to my campaign.
_____	contributed a total of \$ _____	to my campaign.

**Signature:**

I hereby certify that the above statements are true and correct to the best of my knowledge and I understand that a false or inaccurate statement may result in the rejection of this bid/proposal/submittal or the immediate termination of any resulting agreement with the City of Lake Worth Beach.

By: \_\_\_\_\_

Print Name: \_\_\_\_\_

**For City Clerk's Use Only.**

**THIS SECTION SHALL BE COMPLETED ONLY IF THERE IS A CAMPAIGN CONTRIBUTION LISTED ABOVE BY THE VENDOR OR COMMISSION MEMBER.**

Applicable campaign contributions were disclosed in writing above, and prior to the award of the contract, the following statements were verbally made at the City Commission Meeting on the \_\_\_\_\_ day of \_\_\_\_\_, 202\_\_\_\_\_.

Check all that apply.

\_\_\_\_\_ Commissioner/Mayor \_\_\_\_\_ verbally disclosed the campaign contribution(s) set forth above.

\_\_\_\_\_ Vendor, \_\_\_\_\_, verbally disclosed the campaign contribution(s) set forth above.

EXHIBIT "F"

**RFP# 23-200 Housing Emergency Study and Rent Control Ordinance Analysis**

**CONFIRMATION OF DRUG-FREE WORKPLACE**

In accordance with Section 287.087, Florida Statutes, whenever two or more proposals are equal with respect to price, quality, and service which are received by any political subdivision for the procurement of commodities or contractual services, a proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

- (1) Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
- (2) Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
- (3) Give each employee engaged in providing the commodities or contractual services that are under proposal a copy of the statement specified in subsection (1).
- (4) In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than 5 days after such conviction.
- (5) Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by, any employee who is so convicted.
- (6) Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign this statement on behalf of Florida Atlantic University, I certify that Florida Atlantic University complies fully with the above requirements.



\_\_\_\_\_  
Authorized Representative's Signature

11/26/2023

\_\_\_\_\_  
Date

Muriel Industrious

\_\_\_\_\_  
Print Name

Associate Director, Office of Sponsored Programs

\_\_\_\_\_  
Position

**EXHIBIT "G"**

**RFP# 23-200 Housing Emergency Study and Rent Control Ordinance Analysis**

**SCRUTINIZED COMPANIES CERTIFICATION FORM**

By execution below, I, Muriel Industrious, on behalf of Florida Atlantic University (hereinafter, the "Contractor"), hereby swear or affirm to the following certifications:

The following certifications apply to all procurements:

1. The Contractor has reviewed section 215.4725, Florida Statutes, section 215.473, Florida Statutes and section 287.135, Florida Statutes, and understands the same.
2. The Contractor is not on the Scrutinized Companies that Boycott Israel List nor is the Contractor engaged in a boycott of Israel.
3. If awarded a contract, the Contractor agrees to require these certifications for applicable subcontracts entered into for the performance of work/services under this procurement.
4. If awarded a contract, the Contractor agrees that the certifications in this section shall be effective and relied upon by the City for the entire term of the contract, including any and all renewals.

If the contract awarded hereunder is for one million dollars or more, the following additional certifications apply:

1. The Contractor is not on the Scrutinized Companies with Activities in Sudan List.
2. The Contractor is not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.
3. The Contractor is not engaged in business operations in Cuba or Syria.
4. If awarded a contract, the Contractor agrees to require these certifications for applicable subcontracts entered into for the performance of work/services under this procurement.
5. If awarded a contract, the Contractor agrees that the certifications in this section shall be effective and relied upon by the City for the entire term of the contract, including any and all renewals.

**CONTRACTOR:**

By: Florida Atlantic University

Name: Muriel Industrious *Muriel Industrious*

Title: Associate Director, Office of Sponsored Programs Date: 1/26/2023

STATE OF Florida

COUNTY OF Palm Beach

THE FOREGOING instrument was acknowledged before me by means of  physical presence or  online notarization on this 26th day of January, 2023, ~~2022~~, by Muriel Industrious, as the Authorizing Official [title] of Florida Atlantic University [vendor's name], a Public, state supported institution of higher education [corporate description], who is personally known to me or who has produced \_\_\_\_\_ as identification, and who did take an oath that he or she is duly authorized to execute the foregoing instrument and bind the CONTRACTOR to the same.

Notary Seal:

Notary Public Signature: *Avis P. Cochran*  
Avis P. Cochran

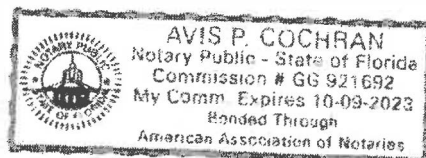




EXHIBIT "H"

RFP# 23-200 Housing Emergency Study and Rent Control Ordinance Analysis

VETERAN BUSINESS ENTERPRISE, SMALL BUSINESS AND  
LOCAL BUSINESS PREFERENCE FORM

Section 2-117 of the City's Code of Ordinances shall govern the application of a Veteran Business Enterprise, Small Business and/or Local Business preference for this RFP.

The undersigned Respondent, hereby claims the following preference:

- Veteran Business Enterprise
- Small Business
- Local Business

Documentation to support a Respondent as a Veteran Business Enterprise, Small Business and/or Local Business must be submitted with a bid in response to the RFP and attached to this form. Documentation submitted after the bid deadline will be rejected.

**Signature:**

I hereby certify that the above statements are true and correct to the best of my knowledge and I understand that a false or inaccurate statement may result in the rejection of this bid/proposal/submittal or the immediate termination of any resulting agreement with the City of Lake Worth Beach.

By: 

Print Name: Philip Lewin

Print Title: Associate Professor of Sociology

Print Name of Business: Florida Atlantic University



# Lake Worth Beach Housing Emergency Study and Rent Control Ordinance Analysis

Philip Lewin, Ph.D., Yanmei Li, Ph.D., Carter Koppelman, Ph.D.

Florida Atlantic University

# Context: Rapidly Rising Housing Costs across South Florida

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- Only 13% of PBC residents can afford a median value home
- Shortage of at least 78,000 workforce/affordable units across PBC
- PBC loses an additional 17,000 affordable units to appreciation each year
- Two-thirds of LWB renters were cost-burdened according to 2021 PBC Housing Assessment
- LWB's median asking rent has since increased to \$2,214
- 48.1% of South Florida households believe they are “somewhat likely” or “very likely” to face eviction or foreclosure within the next two months





# Research Question #1

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- What constitutes a “grave housing emergency?” What constitutes a “serious menace to the general public?”
  - Review housing research and previous emergency resolutions to interpret the meaning of Florida Statute 166.043
  - Develop an objective method for assessing whether a municipality faces a “housing emergency” that legally justifies price controls



(2) No law, ordinance, rule, or other measure which would have the effect of imposing controls on rents shall be adopted or maintained in effect except as provided herein and unless it is found and determined, as hereinafter provided, that such controls are necessary and proper to eliminate an existing housing emergency which is so grave as to constitute a serious menace to the general public.

(3) Any law, ordinance, rule, or other measure which has the effect of imposing controls on rents shall terminate and expire within 1 year and shall not be extended or renewed except by the adoption of a new measure meeting all the requirements of this section.

(4) Notwithstanding any other provisions of this section, no controls shall be imposed on rents for any accommodation used or offered for residential purposes as a seasonal or tourist unit, as a second housing unit, or on rents for dwelling units located in luxury apartment buildings. For the purposes of this section, a luxury apartment building is one wherein on January 1, 1977, the aggregate rent due on a monthly basis from all dwelling units as stated in leases or rent lists existing on that date divided by the number of dwelling units exceeds \$250.

# Research Question #2

- Is there a grave housing emergency in the City of Lake Worth Beach? If so, what is its extent, scope, and nature?
- Data to be collected:
  - Housing costs relative to historical norms
  - Relationship between housing costs and residents' economic means
  - Incidence and level of cost-burden
  - Incidence of eviction and payment delinquency
  - Ability of support agencies to satisfy demand for housing services
  - Incidence of substandard and/or dangerous housing
  - Public perception of emergency



# Research Question #3

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- What effects have rising housing costs had on the health, safety, and welfare of Lake Worth Beach residents? Do these effects pose a “serious menace to the general public?”
- Data to be collected:
  - Effects on residents’ economic vitality and overall well-being
  - Effects on neighborhood stability (displacement, gentrification, loss of community character)
  - Effects on community stability (labor shortages, school performance, public safety)
  - Incidence of detrimental housing outcomes (overcrowding, eviction, homelessness)
  - Incidence of exploitative and abusive landlord practices (illegal eviction, extraneous fees, price gouging, extortion)



# Research Question #4

- What are the underlying causes of housing unaffordability and distress in the City of Lake Worth Beach?
- Factors to be analyzed:
  - Population growth
  - Real estate speculation
  - Short-term vacation rentals
  - Seasonal migration
  - Growth management policies and land development regulations
  - County-level economic development and housing policy
  - Rising insurance rates
  - Macro-level factors (federal housing policy, supply chains, interest rates, etc.)





# Research Question #5

- What measures would most improve housing conditions in the City of Lake Worth Beach? What housing policies would best protect the health, safety, and welfare of residents?
- Factors to be analyzed:
  - Policy options and recommendations
  - Anticipated impacts of policies and timelines for relief
  - Sequencing suggestions
  - Recommended resources for affordable housing development and preservation



# Research Question #6

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- Is a rent control ordinance necessary and proper for addressing Lake Worth Beach's housing needs? Would a rent control ordinance conform to state legal requirements?
- Analysis to be provided:
  - Definitive answer supported by comprehensive data
  - Implementation options and recommendations





## Timeline for Study

- Complete all aspects of study by **January 31, 2024**
  - Collection and mapping of relevant quantitative data (Census, market listings, etc.)
  - Interviews with community stakeholders (tenants, landlords, housing providers, etc.)
  - Analysis of public records (real estate transactions, evictions, emergency assistance, etc.)
  - Field observations of housing conditions
  - Review of City housing policies and LDRs
  - ***Our timeline can be phased and/or modified based on the City's needs and priorities (e.g., expedited delivery of vacation-rental analysis)***
- Final report
  - Interpretation of Florida Statute 166.043 with procedures for evaluating future emergencies
  - Comprehensive overview of local housing conditions/needs for future planning
  - Policy recommendations for improving housing access, affordability, and equity
  - Guidance on rent control ordinance



## Budget

- Total anticipated cost: **\$57,034.18**
  - Summer and fall course release for principal investigator - **\$22,678.20**
  - Funding for two graduate research assistants - **\$16,000**
  - Interview transcription - **\$3,750**
  - Public records - **\$1,164.80**
  - Indirect institutional costs to FAU - **\$13,441.18**

**Questions?**



# STAFF REPORT REGULAR MEETING

**AGENDA DATE:** March 7, 2023

**DEPARTMENT:** Community Sustainability &  
Finance Department

**TITLE:**

Discussion on Solicitation for L & M Streets Property Development

**SUMMARY:**

Discussion on solicitation to be applicable for L and M Property Development

**BACKGROUND AND JUSTIFICATION:**

In December of 2021, the City Commission approved a contract with TCRPC to undertake a comprehensive study of the downtown, specifically the properties purchased by both the City and Community Redevelopment Agency (CRA), to garner public input and dialogue as to the appropriate redevelopment future for the area, which is all within the City's Old Town Historic District.

Actions taken by staff from the TCRPC were a formal multi-day Charrette and public outreach exercise hosted at The Hatch in April of 2022, conversations with downtown stakeholders, interviews with the Mayor and Commissioners, presentations to advisory boards and other outreach exercises. Over the course of the following months, an initial draft master plan was developed that included various development scenario options including financial feasibility analyses, each based on the input and suggestions coming from the public outreach. Initial concepts were discussed with City and CRA Staff, who provided direction to further analyze the scenarios that had the greatest potential of being financially successful.

On January 24, 2023, a final draft Downtown Master Plan (Plan) was presented to the City Commission and the general public. The Plan includes the development program and financial proforma of the various schemes conceptualized including specific recommendations to address site and building design, land development regulations, major thoroughfare design guidelines, historic preservation guidelines, affordable/workforce housing program requirements and site and building qualitative and performance requirements as well as comprehensive plan issues.

At the same meeting, the City Commission accepted the proposal from the Downtown Master Plan and requested that the City staff recommend the best solution for solicitation of L and M Property Development.

Taking into consideration the complexity of the project and concern in meeting the City's code and financial requirements, the City and CRA Staff discussed the possible options and recommend that a two-phase Request for Proposal (RFP) is most advantageous for this project. The RFP shall contain the set of mandatory minimum qualification requirements to ensure that the City's code and financial requirements are met prior to proceeding in further evaluation of project proposals and designs from a select group of respondents.

**Phase I: Qualifications**

Phase I of the RFP will focus on the qualifications of the proposers as experienced, professional architecture and development teams with a focus on not only preserving historic structures but also having undertaken a substantial redevelopment in a downtown setting that has a unique and distinctive flavor. To be considered a qualified proposer, the firm or firms will be required to show the financial capacity to complete a project of this size and with the intended vision as indicated in the Downtown

Parcels Master Plan created by the Treasure Coast Regional Planning Council and the public as well as the City's Major Thoroughfare Design Guidelines and Historic Preservation Design Guidelines.

Minimum qualifications of this RFP for the Phase I will be:

1. Proposers shall be experienced, stable and financed development firms, who have completed similar projects.
2. Experience in historic preservation projects by saving and revitalizing historic structures that give the neighborhood a distinctive character.
3. Qualified designer, planner and/or architect on staff or as a consultant, who has experience with redeveloping areas containing contributing historic structures.
4. The proposal will outline the Proposer's goals for this project. The outline of the goals should give an overview of the development envisioned. The proposer must describe the general, architectural style and character as well as any highlights of the design that deserve extra attention.
5. Qualified primary management team involved with the project and any consultants on the design or development team.
6. Experience with projects in South Florida that include workforce housing options, affordable housing options and/or attainable housing options.
7. The proposal shall include a purchase price the developer must be willing to pay for the 11 CRA-owned lots. A minimum offer of \$2M is required. Any offers above the minimum required will earn the proposer extra points.

Top three proposals that are chosen by the Selection Team for further consideration will be invited to submit complete proposals that incorporate all the necessary portions and qualifications listed in PHASE II of this solicitation (unless determined otherwise by City and CRA Staff).

## **Phase II – Full Proposal**

1. This phase of the proposal will include site plans showing a general layout of the development, specifically identifying the location and physical situation of:
  - The land required for the project, including property boundaries and a definitive plan as to whether the Proposer envisions purchasing and developing all the land available.
  - Existing buildings and new buildings that may be erected, including the approximate square footage for each, as well as, architectural elevations for each.
  - Parking areas and parking area access ways.
  - Any additional features such as outdoor facilities, areas of significant landscaping, outbuildings, areas for future development, public parking opportunities, etc.
2. The project should produce enough parking to meet the demands of the development. The location of the parking, using the sites available, its structure and design may be interpreted by the developer.
3. The project must provide aesthetically-pleasing, well-designed units incorporating innovative features and amenities such as green, sustainable building techniques, while meeting the City's mixed-use zoning regulations, thoroughfare design guidelines and historic preservation design guidelines. Must work with CRA/ City Staff to identify and incorporate the design objectives for the area, as expressed in the City's Comprehensive Plan, and Treasure Coast Regional Planning Council's (TCRPC) Lake Worth Beach Downtown Master Plan as well as City's Strategic Plan.

4. The project may include provisions to take advantage of the City's planned development incentives as well as sustainable bonus incentive and transfer development rights incentives program. In addition, modifications to the future land use, zoning and other regulatory requirements may be suggested in light of the recommendations from the TCRPC Lake Worth Beach Downtown Master Plan.
5. Indicate an ability to begin the project within 180 days (TBD, might allow for more time) of the contract award with financing and management teams secured and to have the project completed within three (3) years.
6. Only development proposals that will generate ad-valorem taxes will be accepted.
7. The redevelopment should support, enhance and elevate the City's image and brand on a regional and national basis.
8. The proposal should include, when allowable, one, two and some three-bedroom residential units.
9. Projects should incorporate public art or amenities.
10. A proposer may submit a proposal for only one of the parcels or a combination of the properties, if desired. A proposer that includes all the project area is preferred.

A Selections Committee, led by CRA staff will complete the final evaluations and recommendations for Phase I and Phase II.

***A sample dual phase Request for Proposal (RFP) draft document is provided as an example and reference only. It should be viewed in terms of providing structure and format for the future final RFP. The final RFP will incorporate input from the City Commission, the CRA Board, CRA Staff and City Staff as well as any additional policy directions regarding regulatory requirements for the proposed development.***

**MOTION:**

Move to approve/disapprove issuance of a Request for Proposal (RFP) for the L and M Property Development as a two-phase solicitation, with Phase I being qualification process and Phase II final selection.

**ATTACHMENT(S):**

Downtown Master Plan  
L and M Properties Documentation  
Sample CRA RFP





**AGENDA**  
**CITY OF LAKE WORTH BEACH**  
**SPECIAL CITY COMMISSION MEETING - L & M PROPERTIES**  
**CITY HALL COMMISSION CHAMBER**  
**TUESDAY, JANUARY 24, 2023 - 5:00 PM**

**ROLL CALL:**

**PLEDGE OF ALLEGIANCE:** led by Commissioner Reinaldo Diaz

**NEW BUSINESS:**

- A. [Presentation of the of Final Draft of the Downtown Master Plan by the Treasure Coast Regional Planning Council \(TCRPC\)](#)

**ADJOURNMENT:**

The City Commission has adopted Rules of Decorum for Citizen Participation (See Resolution No. 81-2022). The Rules of Decorum are posted within the City Hall Chambers, City Hall Conference Room, posted online at: <https://lakeworthbeachfl.gov/government/virtual-meetings/>, and available through the City Clerk's office. Compliance with the Rules of Decorum is expected and appreciated.

If a person decides to appeal any decision made by the board, agency or commission with respect to any matter considered at such meeting or hearing, he or she will need a record of the proceedings, and that, for such purpose, he or she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. (F.S. 286.0105)

# STAFF REPORT SPECIAL MEETING

**AGENDA DATE:** January 24, 2023

**DEPARTMENT:** Community Sustainability

**TITLE:**

Presentation of the of Final Draft of the Downtown Master Plan by Treasure Coast Regional Planning Council (TCRPC)

**SUMMARY:**

Presentation and discussion with Dana Little of TCRPC of final draft Downtown Master Plan including recommendations for moving forward and language for future Request for Proposals (RFP)

**BACKGROUND AND JUSTIFICATION:**

In December of 2021, the City Commission approved a contract with TCRPC to undertake a comprehensive study of the downtown, specifically the properties purchased by both the City and Community Redevelopment Agency (CRA), to garner public input and dialogue as to the appropriate redevelopment future for the area, which is all within the City's Old Town Historic District.

Actions taken by staff from the TCRPC were a formal multi-day Charrette and public outreach exercise hosted at The Hatch in April of 2022, conversations with downtown stakeholders, interviews with the Mayor and Commissioners, presentations to advisory boards and other outreach exercises. Over the course of the following months, an initial draft master plan was developed that included various development scenario options including financial feasibility analyses, each based on the input and suggestions coming from the public outreach. Initial concepts were discussed with City and CRA Staff, who provided direction to further analyze the scenarios that had the greatest potential of being financially successful. By the end of 2022, a final draft Downtown Master Plan (Plan) was ready for formal presentation to the City Commission and the general public.

The Plan includes the development program and financial proforma of the various schemes conceptualized including specific recommendations to address site and building design, land development regulations, major thorough design guidelines, historic preservation guidelines, affordable/workforce housing program requirements and site and building qualitative and performance requirements as well as comprehensive plan issues.

**MOTION:**

Move to approve/disapprove the Final Draft Downtown Masterplan including direction as to the parameters to be included in any future Requests for Proposals for the redevelopment of the L and M properties.

**ATTACHMENT(S):**

- Final Draft Downtown Master Plan
- TCRPC Presentation
- L and M Properties Documentation
  - Condemnation Memo
  - Condemnation Letters
  - Estimate of Probable Costs
  - Memo - Estimates of Probable Costs

# LAKE WORTH BEACH DOWNTOWN PARCELS MASTER PLAN

FINAL  
DECEMBER 2022



PREPARED BY THE  
TREASURE COAST REGIONAL PLANNING COUNCIL

## CITY COMMISSION

<b>BETTY RESCH</b>	<b>MAYOR</b>
<b>SARAH MALEGA</b>	<b>DISTRICT 1</b>
<b>CHRISTOPHER MCVOY</b>	<b>DISTRICT 2</b>
<b>KIM STOKES</b>	<b>DISTRICT 3</b>
<b>REINALDO DIAZ</b>	<b>DISTRICT 4</b>

## CRA BOARD

BRENDAN LYNCH, CHAIRMAN  
CARLA BLOCKSON, VICE CHAIR  
ANNE FAIRFAX  
LEAH FOERTSCH  
CAROLINE GLASS SHAMSI-BASHA  
DONNA KERNER  
DANIEL MORGAN

## CITY STAFF

CARMEN DAVIS, CITY MANAGER  
JUAN RUIZ, ASSISTANT CITY MANAGER  
MELISSA ANN COYNE, CITY CLERK  
WILLIAM WATERS, DIRECTOR OF COMMUNITY  
SUSTAINABILITY

## CRA STAFF

JOAN OLIVA, EXECUTIVE DIRECTOR  
CHRIS DABROS, DEPUTY DIRECTOR  
EMILY THEODOSSAKOS, MARKETING  
AND PROGRAM DIRECTOR  
MONA FEIGENBAUM, FINANCE

## TREASURE COAST REGIONAL PLANNING COUNCIL

THOMAS LANAHAN, EXECUTIVE DIRECTOR ~ DANA LITTLE, URBAN DESIGN DIRECTOR ~ JESSICA SEYMOUR ~ PRINCIPAL PROGRAM COORDINATOR ~ KIM DELANEY, DIRECTOR OF STRATEGIC DEVELOPMENT & POLICY ~ STEPHANIE HEIDT, ECONOMIC DEVELOPMENT & INTERGOVERNMENTAL PROGRAMS DIRECTOR

## CONSULTANTS FOR TCRPC

LAUREN MOSS CLARK ~ JOSE VENEGAS ~ TIM HERNANDEZ ~ SHAILENDRAH SINGH ~ STEVEN FETT ~ ANDREW GEORGIADIS

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## ABBREVIATIONS & TERMS

CRA	Community Redevelopment Agency
FDOT	Florida Department of Transportation
OTHD	Old Town Historic District
PBC	Palm Beach County
RFP	Request for Proposal
sf	Square Feet
TCRPC	Treasure Coast Regional Planning Council
TIF	Tax Increment Financing
TPA	Transportation Planning Agency

In accordance with the requirements of Title II of the American with Disabilities Act of 1990, the City of Lake Worth Beach will not discriminate against qualified individuals with disabilities on the basis of disability in the City’s services, programs, activities or facilities. In accordance with Title II of the ADA, when viewed in their entirety, City of Lake Worth Beach programs, services, activities and facilities are readily accessible to and usable by qualified individuals with disabilities. Those requiring ADA readable materials please contact the CRA offices directly at 561-493-2550 or by email at [info@lakeworthcra.org](mailto:info@lakeworthcra.org). Hearing impaired individuals are requested to telephone the Florida Relay System at #711.

## DOWNTOWN LAKE WORTH BEACH

This Master Plan report reflects the efforts and collaboration of the City of Lake Worth Beach (City), the Lake Worth Beach Community Redevelopment Agency (CRA), the Treasure Coast Regional Planning Council (TCRPC), and the residents and business owners of Lake Worth Beach. This multi-agency public planning process began in the fall of 2021 when TCRPC was requested to assist in developing a vision for multiple publicly owned parcels in downtown Lake Worth Beach. Over the course of many years, and with a variety of different funding sources, the City and CRA have assembled parcels at S. 'K' Street and 1st Avenue, and the block between 'L' and 'M' street from Lake Avenue to S. 1st Avenue. The sensitive location of these assemblages, being in the historic downtown and occupying the transition block between the Lake Avenue commercial corridor and the predominantly residential neighborhoods immediately south, generated community concern over the scale and character of future redevelopment. This report will chronicle the public outreach, planning process, design concepts, and financial analyses developed to assist the City and CRA in making decisions regarding the appropriate future of these properties.





Figure 1 Image: Acquisition funding source map



Figure 2 Image: Current ownership map

The images to the left show the key study area properties and which public entity purchased the property (top) and which entity currently owns the property. These maps are key as 1) many of the City acquired parcels were purchased with funds provided through the 2017 Palm Beach County “Penny Sales Tax” which requires utilization for a public purpose, and 2) the CRA has acquired the majority of the parcels (bottom left) for the purposes of redevelopment.

The area in question is within the Old Town Historic District as illustrated in the image below. A number of historically contributing structures existed on the parcels acquired.

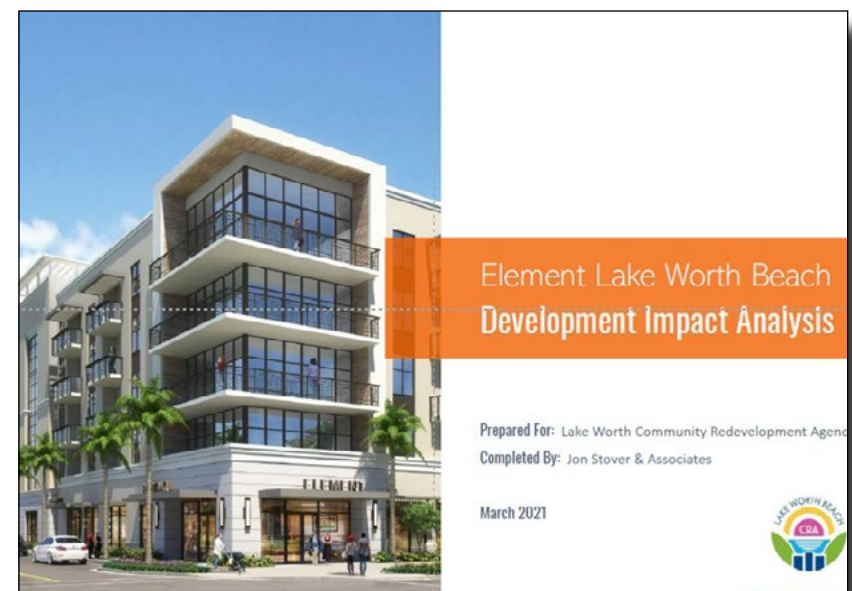


Figure 3 Image: Map of the Old Town Historic District

# I. INTRODUCTION

In March of 2020 the CRA issued a Request for Proposals (RFP) for the publicly owned lands on S. 'K' Street and between S. 'L' and 'M' Streets. Identified as RFP Sites 1, 2 and 3 (image lower left), the development request sought residential and mixed-use redevelopment consistent with the city's Land Development Regulations which included incentives for additional height and density in return for compliance with extra sustainability requirements. The RFP submission deadline was extended to August 2020 due to the effects of the COVID-19 pandemic and in September 2020, the City and CRA reviewed and ranked the submissions. In October 2020 the CRA Board selected the recommended application for "Element Lake Worth Beach" (lower right). A development impact analysis for that proposal was prepared for the CRA in March 2021.

Despite the public RFP and application review process and compliance with the city code, there was growing concern within the community regarding the scale and character of the selected development proposal. The March 2021 municipal election, which brought in a new Mayor and three new City Commissioners, cemented the public opposition to the Element proposal and ultimately that application was withdrawn.





The community concerns over the RFP process and submittal, and the future of the contributing historic structures existing on the development sites, led to the creation of a counter-proposal by the Palm Beach architecture firm of Fairfax & Sammons. This alternative vision for the area recommended not one large scale building occupying all of the parcels, but a more incremental approach in keeping with the historic context of the area. The Fairfax & Sammons proposal (below) began to circulate throughout the community and was viewed by many as a desirable direction for the redevelopment of these publicly owned lands. In addition, their proposal sought to incorporate many of the existing contributing structures.



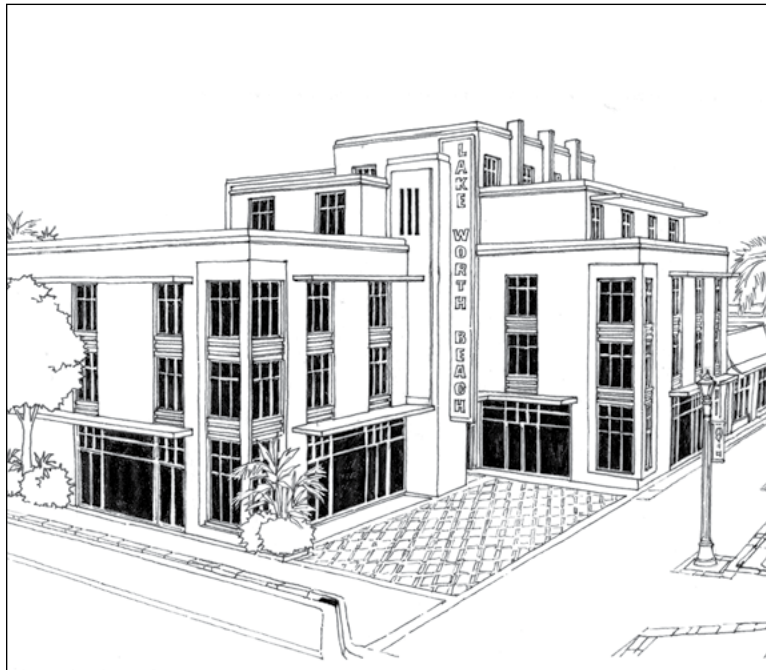
Figure 4 Image: Saturday public workshop hosted by the CRA at Hatch 1121.



With growing community concerns over the future of these sites, and the counter proposal developed by Fairfax & Sammons Architects illustrating an alternate approach, the City and the CRA sought to collaborate in a public outreach and design process to build consensus on the appropriate direction for this area.

In January 2022 the City entered into an Interlocal Agreement with TCRPC to conduct a public planning process and develop recommendations for the future of these sites. Initially planned as a “virtual” effort, the receding effects of the pandemic afforded the opportunity for an in-person, five-day public design charrette in April 2022. The CRA, which funded the planning effort, hosted the Saturday public workshop (see above) at the CRA offices at Hatch 1121.

After the Saturday, April 30th public workshop at Hatch 1121, the TCRPC design team established a design studio at the same location and worked through Wednesday, May 4th developing the ideas and concepts discussed during the workshop. A team of architects, planners, and a local developer was assembled to explore the physical and financial possibilities for future redevelopment. The public was welcome to, and frequently did, drop in to the studio to share ideas and discuss concepts with the team.



The following chapters of this report illustrate the design concepts, financial analyses, and redevelopment recommendations for the sites at S. 'K' Street and the S. 'L' and 'M' Streets block. The scale, architectural character, positioning and placement of buildings, historic preservation, financial feasibility, and other environmental and community sensitivities were taken into consideration in the development of this plan. While there may not be a single "right" answer to the development approach for these parcels, the City and the CRA should be commended for investing in this public dialogue.

### SCENARIOS

At the core of the public sentiment towards the redevelopment of the City and CRA owned properties is the desire for a smaller, incremental infill development consistent with the historic scale and character of the area. Located within the Old Town Historic District, these sensitivities are understandable and warranted. Triangulating these community desires with the financial feasibility of such redevelopment and the available development rights within the existing city codes is a considerable challenge. Add to that the interest of many to preserve the on site contributing historic structures, despite their current condition, complicates the equation further.

The parcels facing Lake Avenue have an existing zoning designation of DT (Downtown) which allows for a maximum density of 40 dwelling units per acre and a building height of two stories and up to five stories utilizing the sustainability incentives. The parcels facing 'L', 'M', and 1st Avenue South have a MU-E (Mixed-Use East) zoning designation which allows for a maximum density of 30 dwelling units per acre and a building height of two stories and up to three with incentives.

The design team explored a variety of ways to maximize densities, retain the contextual scale and character of the area, and accommodate parking across all of the development sites. Whether to keep or relocate existing contributing structures was also a factor in the creation of the conceptual design scenarios.

This chapter outlines a series of development scenarios believed to be consistent with input provided by the residents of Lake Worth Beach.



# II. TOUR OF THE SCENARIOS

**SITE KEY**  
1. L&M CONCEPTS (A,B,C)  
2. K STREET CONCEPTS (D,E,F,G)  
3. 1ST AVENUE SOUTH CONCEPTS (H,I)



OVERVIEW OF SCENARIOS

This page serves as a legend to the variety of different design scenarios that were developed throughout the charrette process. The previous page identifies the locations of the three sites considered (1, 2, and 3).

Below is a key to the different scenarios developed for each of the sites.

SITE 1 - L AND M STREETS

A



B



C

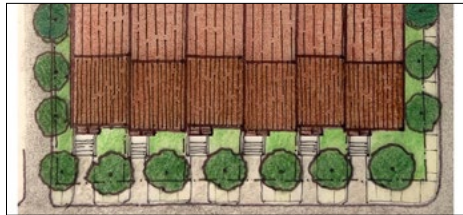


SITE 2 - K STREET

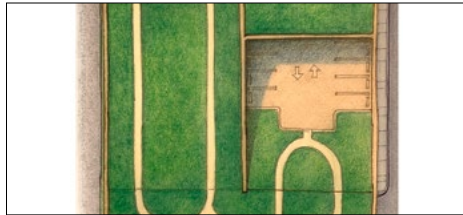
D



E



F



G



SITE 3 - 1ST AVENUE SOUTH

H



I



### L & M STREET CONCEPTS

Three different design scenarios were developed for site one - the block between 'L' and 'M' Streets south of Lake Avenue. Each of these concepts conceives of a larger, five story building facing Lake Avenue south to the alleyway. This is consistent with the Fairfax & Sammons proposal. Each of the scenarios keeps the existing restored historic structure facing 'M' street and contemplates different approaches to the contributing structures fronting 'L' Street. The proposed building facing Lake Avenue creates a publicly accessible plaza at the street level for outdoor dining and activities.

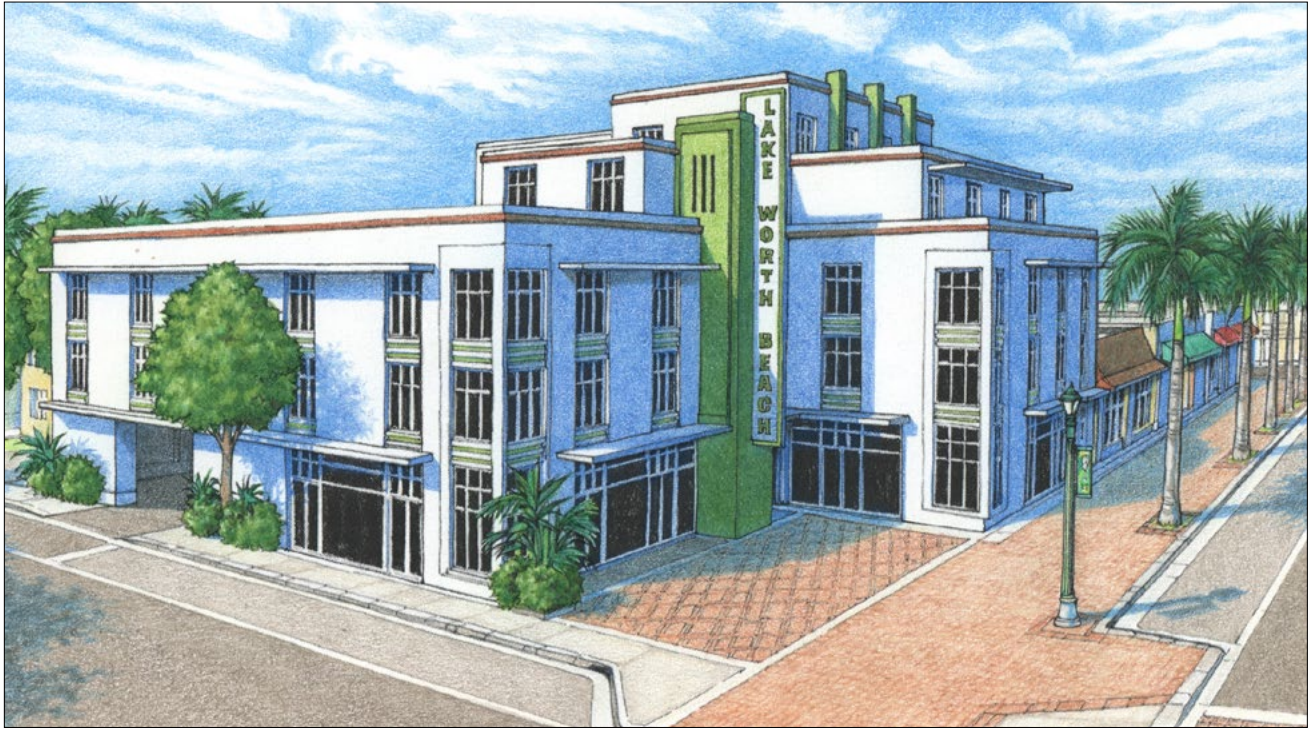
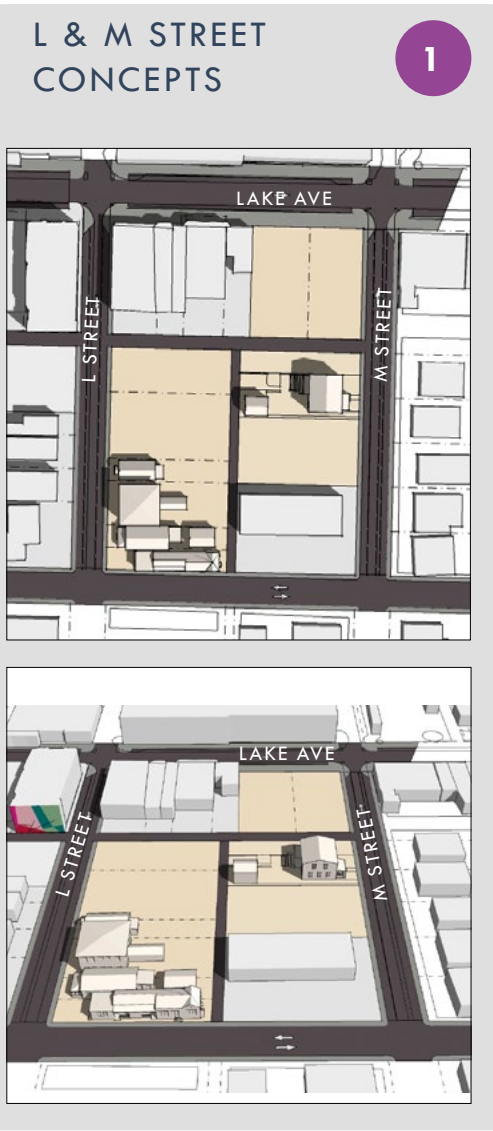


Figure 5 Lake Avenue Redevelopment Concept



CONTRIBUTING STRUCTURES

There are five historically contributing structures on the ‘L’ and ‘M’ block, all in varying conditions. The structure at 17 S. M Street (identified as building “a” below) has been completely restored by the previous owner and serves as the offices for the Leisure Services Department. At the time of the design charrette in April 2022, the fate of the remaining structures was uncertain so care was taken to try to include them in the different design scenarios. Since the charrette, the structures identified below as “d” and “e” have been approved for demolition by the City.

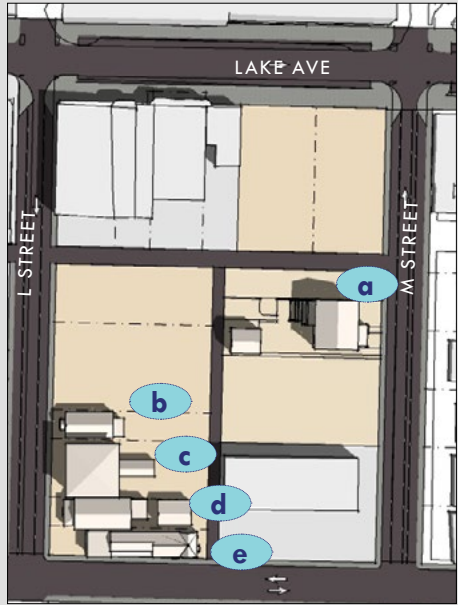
CONTRIBUTING STRUCTURES SUMMARY	
	Notes
a	Built 1941 & renovated in 2019, contributing structure, LWB Leisure Services Office & Storage, 3 on-site parking spaces, 2100-sf
b	Built 1946, contributing structure, listed at 1 DU on property appraiser, 854-sf of gross building sf
c	Built 1933, contributing structure, listed at 4 DU on property appraiser, 3112-sf of gross building sf
d	Built 1930, contributing structure, listed at 2 DU on property appraiser, 1413-sf of gross building sf
e	Built 1935, listed at 4 DU on property appraiser, 1696-sf of gross building sf



L & M STREET CONCEPTS



The map below identifies the location of the five contributing structures on the ‘L’ and ‘M’ block. The various design scenarios recommend different approaches to retaining or removing the structures.



CONTRIBUTING STRUCTURES

L & M STREET CONCEPTS 1





**OPTION**  
**SITE 1**



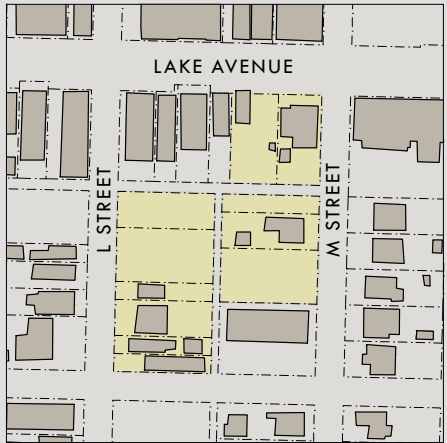
<b>SITE AREA</b>	1.6 acres
<b>NUMBER OF TOTAL UNITS</b>	59 DU (37 du/acre)
<b>CONTRIBUTING STRUCTURES TO REMAIN</b>	1 remains, 2 relocate & renovate, 5 DU
<b>TOTAL NET NEW UNITS</b>	54 DU
<b>GROSS COMMERCIAL SPACE</b>	+/- 5,000 sf
<b>PARKING SPACES</b>	92 parking spaces
<b>ON-STREET</b>	+/- 30 existing to remain
<b>SURFACE</b>	56 (26 under Lake Ave Bldg)
<b>STRUCTURE</b>	0
<b>SELF PARKED</b>	6 in private garage



**L & M STREET CONCEPTS**



Option A recommends removing or relocating all contributing structures facing 'L' Street and replacing them with townhouses, accessory dwelling units along the alley, and a bungalow court in front of a new two story apartment building.



**OPTION A**  
SITE 1

L & M STREET CONCEPTS **1**

**OPTION A SUMMARY**

- Three story building on Lake Ave with 24 units and 5,000-7,500-sf for commercial space
- Six townhouses with garages and accessory units above
- Four bungalow units
- 12 DU apartment
- All surface parking & self parking
- Two contributing structures relocated and renovated (3,970-sf)
- Renovated contributing structures on M Street remain
- TOTAL NEW UNITS = 54 dwelling units

<b>OVERALL BUILDING</b>	3 stories (26 DU)	sf 35,000
<b>GROUND FLOOR</b>	Commercial- 5,200 sf Ground Parking- 7,800 sf	sf 13,000
<b>FLOORS 2-3</b>	Units- 22,000 sf Amenity Deck- 3,250 sf	sf 16,250 +deck

<b>TWO BEDROOMS</b>	(4 DU) SFD Bungalow	sf 3,600
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<b>STUDIO UNITS</b>	(12 DU) 2-story apartment	sf 12,500
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<b>STUDIO UNITS</b>	(6) ADU over garage	sf 1,440
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<b>3+ BEDROOMS</b>	(6 DU) 3-story Townhouse	sf 17,280
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**OPTION**  
**SITE 1**



**L & M STREET**  
**CONCEPTS**



The image to the left is an aerial view of scenario A looking southwest from above Lake Avenue. The larger five story structure is in the foreground. Below is a ground level view of the same building facing Lake Avenue.



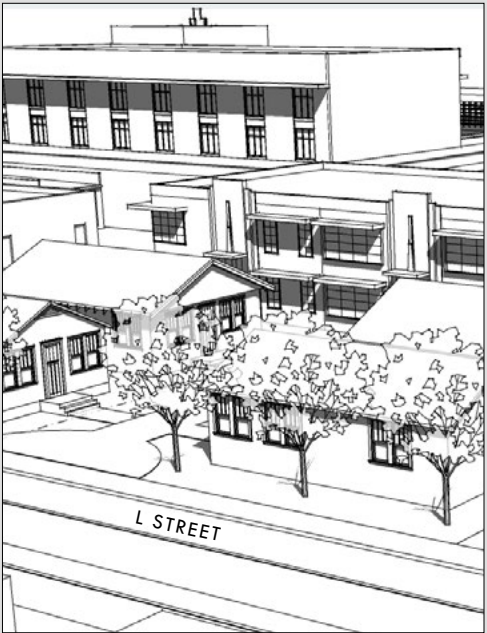
**OPTION**  
**SITE 1**



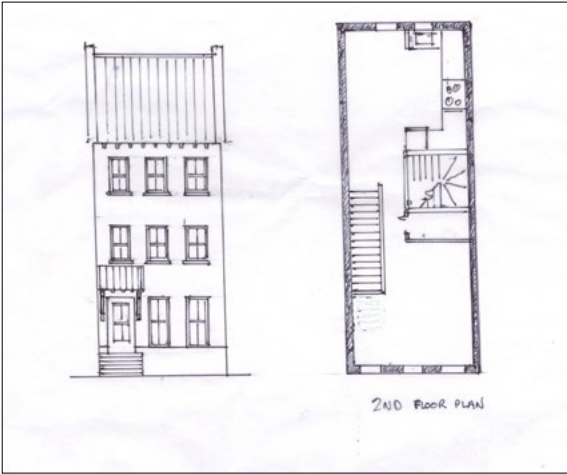
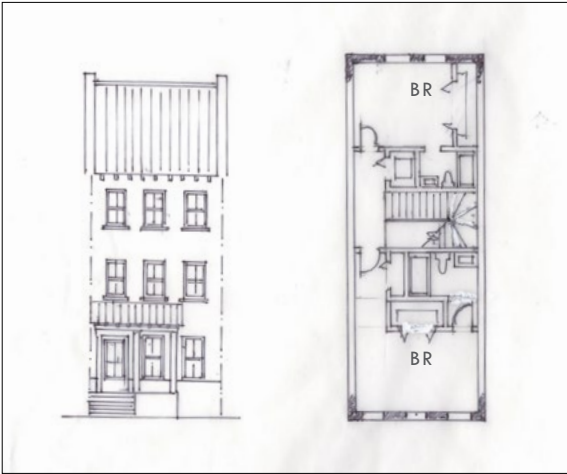
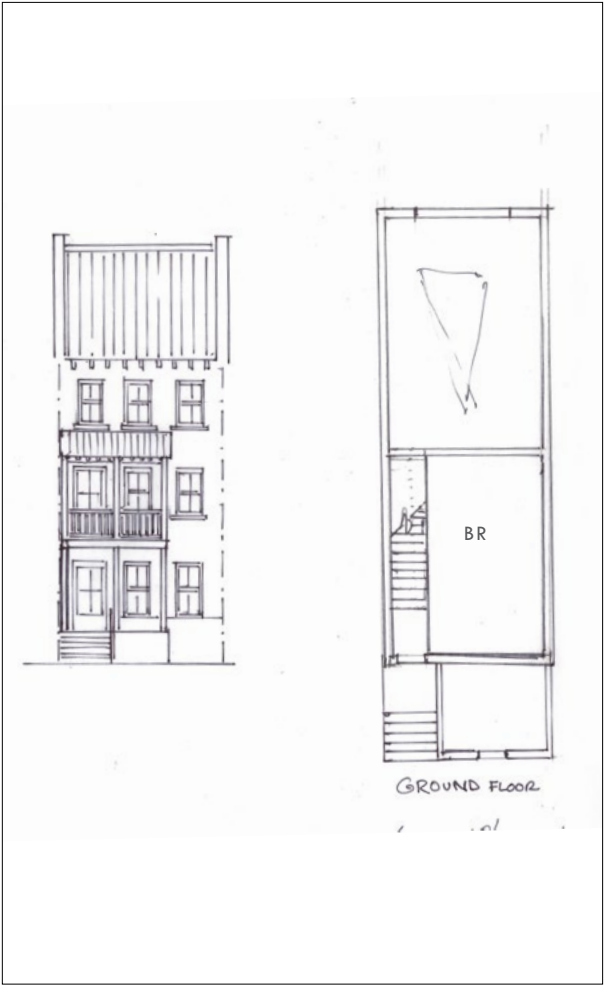
**L & M STREET  
CONCEPTS**



The images on this page are of the proposed bungalow court in front of the new two story apartment building.



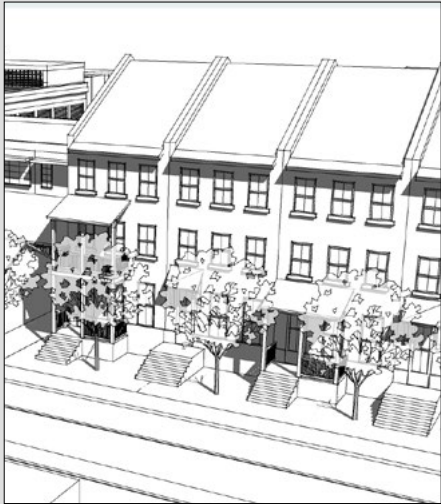
**OPTION**  
**SITE 1**



**L & M STREET**  
**CONCEPTS**



Option A includes a row of townhouses along 'L' Street. These townhouses are proposed to have accessory dwelling units and rear loaded parking accessed from the alleyway. The image to the left illustrates floor plans and elevations of the townhouses and below is a street view of the same.



**OPTION**  
**SITE 1**



**L & M STREET  
CONCEPTS**



The image to the left is an elevated street view of the townhouses and bungalow court proposed on 'L' Street. The townhouses have elevated covered stoops and are three stories. The four units comprising the bungalow court to the left (north) create an entry courtyard to the two story Art Deco apartment building beyond. This proposal incorporates a variety of scales and architectural styles consistent with the historical character of Lake Worth Beach.

On-street parking on 'L' Street would help accommodate the parking demands of the new units as well as parking located off of the rear alleyway. The proposed five story building facing Lake Avenue is seen beyond the Art Deco apartment building.



**OPTION B**  
SITE 1

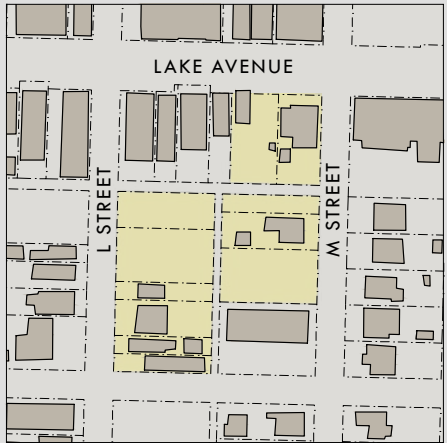
<b>SITE AREA</b>	1.6 acres
<b>NUMBER OF TOTAL UNITS</b>	65 DU (40 DUA)
<b>CONTRIBUTING STRUCTURES</b>	11 DU (1 remain, 3 to renovate) (6,220-sf)
<b>TOTAL NEW NET UNITS</b>	54 DU
<b>GROSS COMMERCIAL SPACE</b>	+/- 7,500-sf
<b>PARKING SPACES</b>	115 parking spaces
<b>ON-STREET</b>	+/- 30 existing to remain
<b>SURFACE</b>	85 (26 under Lake Ave Bldg)



**L & M STREET CONCEPTS**

L&M STREET CONCEPTS

Scenario B incorporates keeping the three southernmost contributing structures on 'L' Street. Two new four unit walk up apartment buildings are proposed immediately north of the contributing structures. A five story mixed-use building is proposed to face Lake Avenue.



**OPTION B**  
SITE 1



L & M STREET CONCEPTS **1**

**OPTION B SUMMARY**

- Five story building on Lake Ave with 38 DU and 5,000-sf for commercial space
  - Two new apartment buildings with 4 DU each
  - One new apartment building with 8 DU
  - All surface parking & under-building parking
  - \* Three historic structures renovated and remain with 11 DU
  - Renovated contributing structure on M Street remains
  - TOTAL NEW UNITS = 54
- \*Since the charrette, the structures identified as “d” and “e” have been approved for demolition by the City.**

<b>OVERALL BUILDING</b>	5 stories (38 DU total)	47,000 sf
<b>GROUND FLOOR</b>	Commercial- 5,000 sf Ground Parking- 7,200 sf	13,500 sf
<b>FLOOR 2</b>	16 DU Amenity Deck- 3,250 sf	13,500 sf
<b>FLOOR 3</b>	10 DU	10,250 sf
<b>FLOOR 4</b>	7 DU	7,500 sf
<b>FLOOR 5</b>	5 DU	5,500 sf
<b>1 BEDROOM</b>	4 DU 2-story Apartment	4,000 sf
<b>1 BEDROOM</b>	4 DU 2-story Apartment	4,000 sf
<b>1 BEDROOM</b>	8 DU 2-story Apartment	7,600 sf





**OPTION**  
**SITE 1**



**L & M STREET**  
**CONCEPTS**

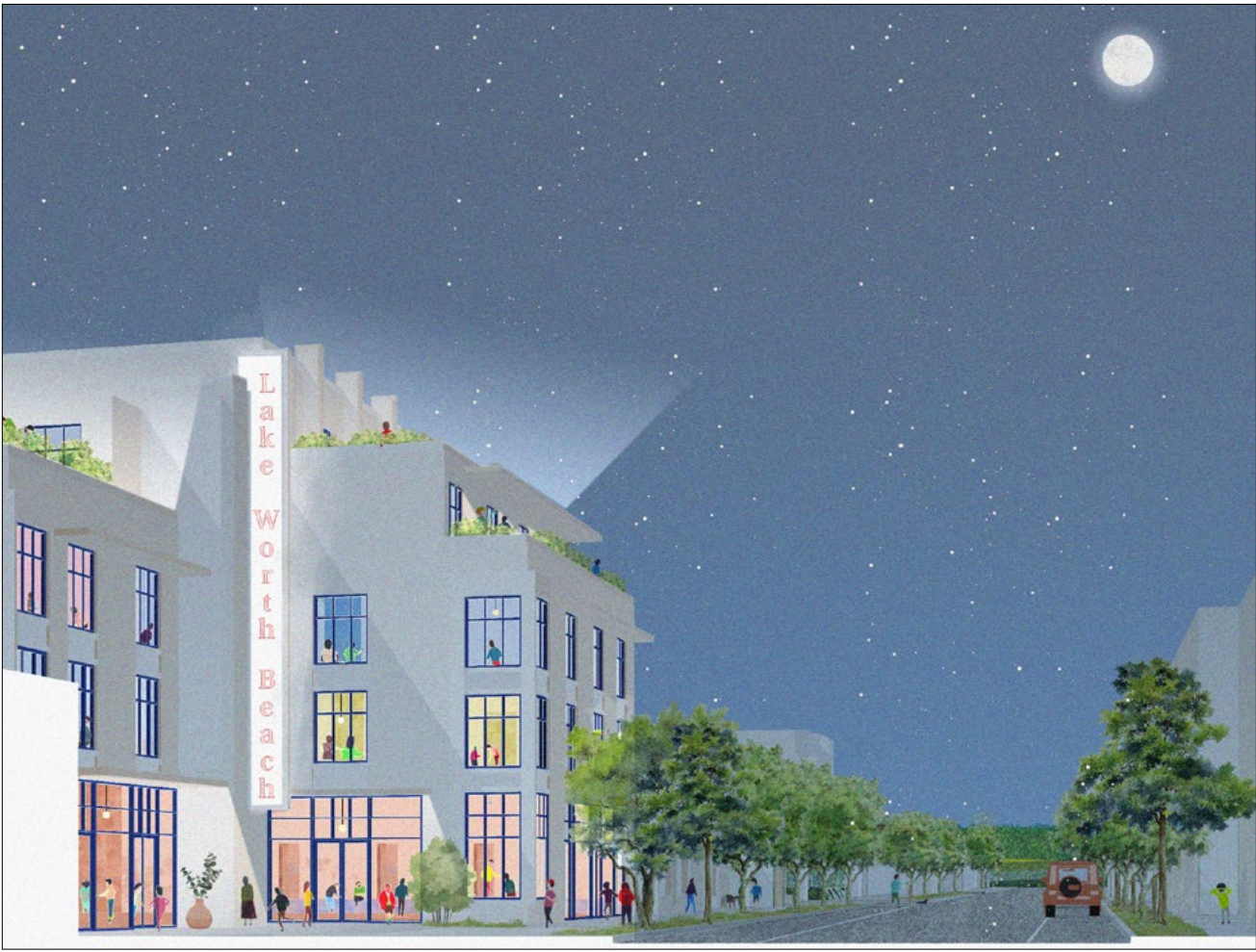


Each of the 'L' and 'M' Street scenarios incorporates a five story mixed-use building fronting Lake Avenue. The building only extends south to the alleyway. These proposals are consistent with the footprint area and scale of the new condominium building facing Lake Avenue at 1 South Palmway.

The rendering to the left illustrates the proposed building at 'M' Street and Lake Avenue. The design team felt that an Art Deco architecture for a building of this scale is appropriate in the Old Town Historic District.



**OPTION**  
SITE 1

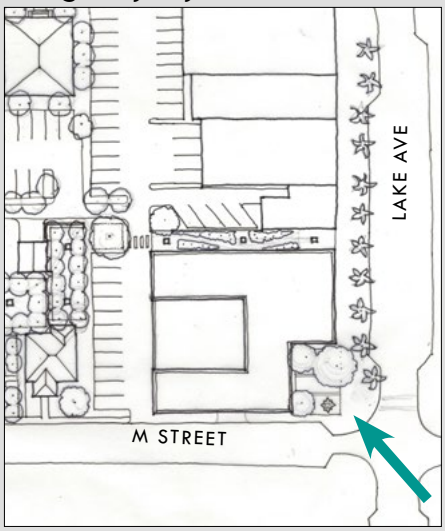


**L & M STREET  
CONCEPTS**



The rendering to the left is a nighttime view of the same building. There is a public plaza at the corner of 'M' Street and Lake Avenue to accommodate outdoor dining and activities.

The plan below shows the direction of the view to the left. Note that covered parking is accessed from the existing alleyway.



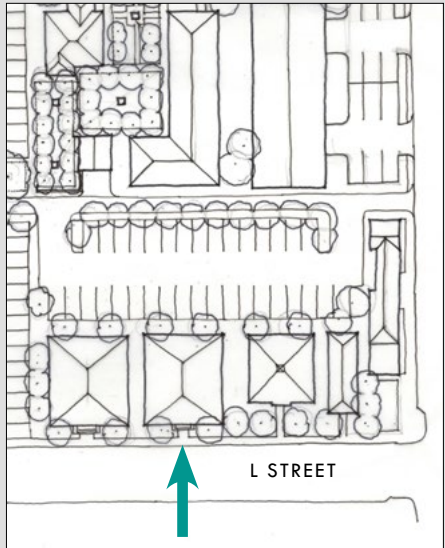
**OPTION**  
SITE 1



**L & M STREET  
CONCEPTS**



The rendering to the left is of the two proposed walk up apartment buildings on 'L' Street. Note the existing structures to the right (south). The plan view below shows the direction of the view for the rendering.



OPTION  
SITE 1



L & M STREET  
CONCEPTS



This aerial rendering gives an overall view of the 'L' and 'M' Street block for scenario B. The five story mixed-use building facing Lake Avenue is in the foreground and the two story walk up apartment buildings on 'L' Street are seen beyond.

The Leisure Services Department building facing 'M' Street is partially wrapped with a new two story apartment building. This building is proposed on the currently vacant lot on 'M' Street. This concept creates a series of intimate courtyard spaces around the restored historic structure.



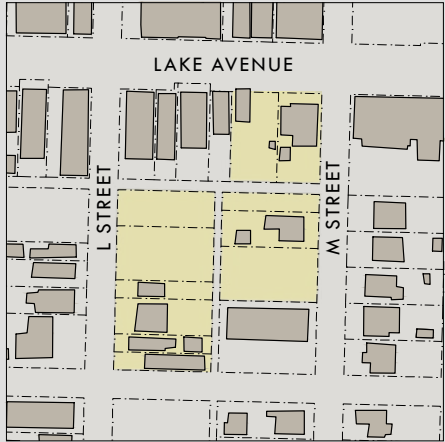
**OPTION C**  
SITE 1

<b>SITE AREA</b>	1.6 acres
<b>NUMBER OF TOTAL UNITS</b>	90 DU (56 DUA)
<b>CONTRIBUTING STRUCTURES</b>	2 remain ( 5 DU)
<b>TOTAL NET NEW UNITS</b>	85 DU
<b>CONTRIBUTING STRUCTURES</b>	5 DU (to remain)
<b>GROSS COMMERCIAL SPACE</b>	+/- 5,000-sf
<b>PARKING SPACES</b>	108 parking spaces
<b>ON-STREET</b>	+/- 30 existing to remain
<b>SURFACE</b>	78 (19 under Lake Ave Bldg)



**L & M STREET CONCEPTS**

Option C keeps the existing walk up apartment building on 'L' Street and proposes a new three story apartment to the north and a two story courtyard building to the south. Like Option B, this scenario proposed a three story apartment south of the Leisure Services Department building on 'M' Street.



## OPTION C SITE 1

## L & M STREET CONCEPTS 1

### OPTION C SUMMARY

- Five story building on Lake Ave with 50 DU and 5,000-sf for commercial space
- Two new apartment buildings with 12 DU each
- One new ADU over garage
- One new live-work lofts with 10 DU
- All surface parking & under-building parking
- Existing structures on L Street (c) & M Street (a) remain
- TOTAL Net new Units = 85 dwelling units

<b>OVERALL BUILDING</b>	5 stories (50 DU total)	47,000 sf
<b>GROUND FLOOR</b>	Commercial- 5,000 sf Ground Parking- 7,200 sf	13,500 sf
<b>FLOOR 2</b>	18 DU Amenity Deck- 2,030 sf	13,500 sf
<b>FLOOR 3</b>	18 DU	11,470 sf
<b>FLOOR 4</b>	10 DU	7,500 sf
<b>FLOOR 5</b>	4 DU	5,500 sf
<b>1 BEDROOM</b>	12 DU 3-story Apartment	11,400 sf
<b>1 BEDROOM</b>	1 DU ADU	900-sf
<b>1 BEDROOM</b>	12 DU 3-story Apartment	11,600 sf
<b>STUDIO UNIT</b>	10 DU 2-Story Loft Units	8,250 sf



**OPTION**  
SITE 1



**L & M STREET  
CONCEPTS**



This view is from ‘M’ Street and shows the existing restored historic structure that houses the city’s Leisure Services Department. In the foreground is the proposed three story Art Deco apartment building that creates a courtyard to the rear of the Leisure Services building. Beyond is the five story mixed-use building facing Lake Avenue. That proposed structure is separated from the historic building by the existing alleyway which provides access to rear loaded parking.

In all scenarios on-street parking is retained and where possible, enhanced.



**OPTION C FINAL VERSION**  
**SITE 1**

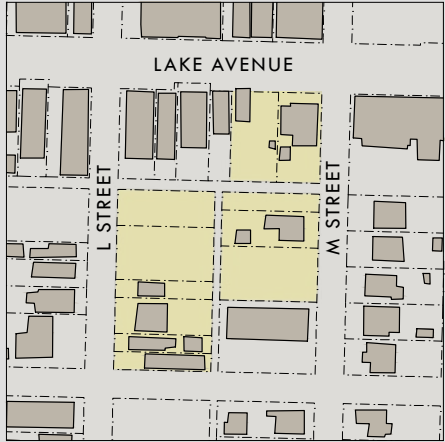
<b>SITE AREA</b>	1.6 acres
<b>NUMBER OF TOTAL UNITS</b>	87 DU (54 DUA)
<b>CONTRIBUTING STRUCTURES</b>	3 remain ( 5 DU)
<b>TOTAL NET NEW UNITS</b>	80 DU
<b>CONTRIBUTING STRUCTURES</b>	7 DU (to remain)
<b>GROSS COMMERCIAL SPACE</b>	+/- 5,000-sf
<b>PARKING SPACES</b>	108 parking spaces
<b>ON-STREET</b>	+/- 30 existing to remain
<b>SURFACE</b>	78 (19 under Lake Ave Bldg)



**L & M STREET CONCEPTS**



Option C Final Version keeps the existing walk up apartment building on ‘L’ Street and proposes a new three story apartment to the north and a two story courtyard building to the south. The relocation of the contributing structure ‘b’ (see page 11) from ‘L’ Street to ‘M’ Street is aligned with the Leisure services building to the north and a three story apartment to the south.





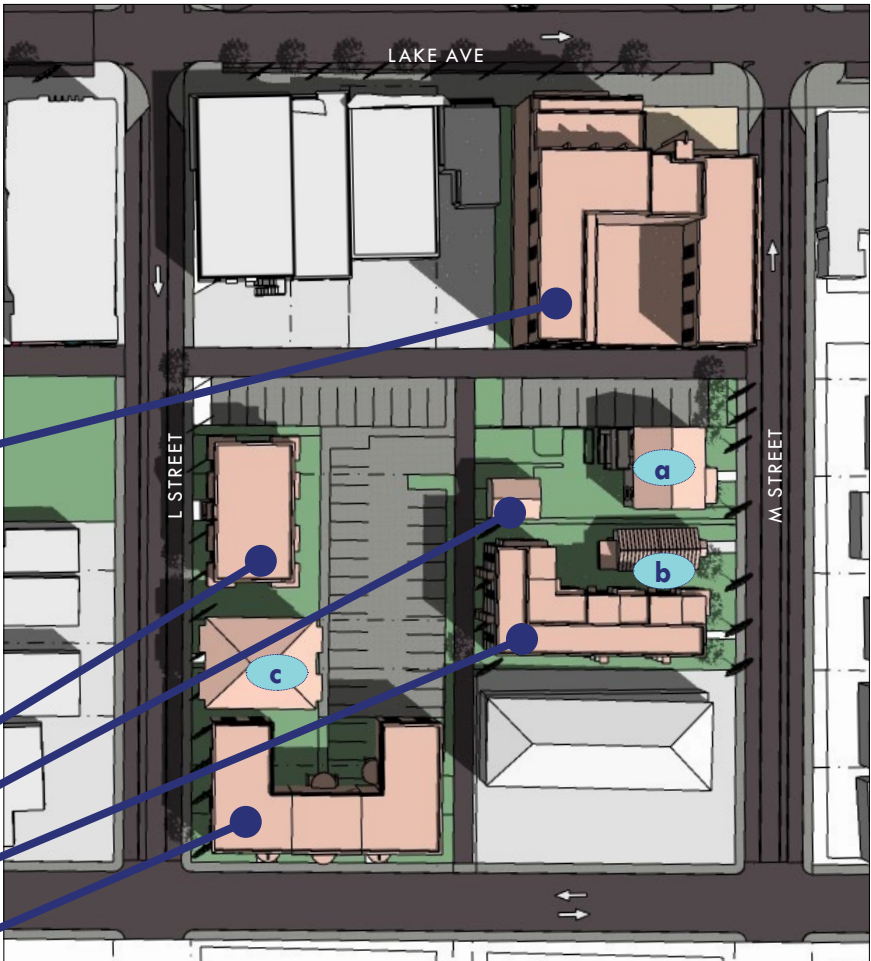
**OPTION C FINAL VERSION**  
SITE 1

L & M STREET CONCEPTS **1**

**OPTION C FINAL VERSION SUMMARY**

- Five story building on Lake Ave with 45 DU and 5,000-sf for commercial space
- Two new apartment buildings with 12 DU each
- One new ADU over garage
- One new live-work lofts with 10 DU
- All surface parking & under-building parking
- Existing structures on L Street (c) & M Street (a) remain L street (b) relocated
- TOTAL Net new Units = 80 dwelling units

<b>OVERALL BUILDING</b>	5 stories (45 DU total)	47,000 sf
<b>GROUND FLOOR</b>	Commercial- 5,000 sf Ground Parking- 7,200 sf	13,500 sf
<b>FLOOR 2</b>	20 DU Amenity Deck- 2,030 sf	13,500 sf
<b>FLOOR 3</b>	15 DU	11,470 sf
<b>FLOOR 4</b>	6 DU	7,500 sf
<b>FLOOR 5</b>	4 DU	5,500 sf
<b>1 BEDROOM</b>	12 DU 3-story Apartment	11,400 sf
<b>1 BEDROOM</b>	1 DU ADU	900-sf
<b>1 BEDROOM</b>	12 DU 3-story Apartment	11,600 sf
<b>STUDIO UNIT</b>	10 DU 2-Story Loft Units	8,250 sf



OPTION C FINAL VERSION  
SITE 1



L & M STREET  
CONCEPTS

1

This view is from ‘M’ Street and shows the existing restored historic structure that houses the city’s Leisure Services Department, and the relocated historic structure from ‘L’ Street aligned just to the south. In the foreground is the proposed three story Art Deco apartment building that creates a courtyard to the rear of the Leisure Services building. Beyond is the five story mixed-use building facing Lake Avenue. That proposed structure is separated from the historic building by the existing alleyway which provides access to rear loaded parking.

In all scenarios on-street parking is retained and where possible, enhanced.



### K STREET CONCEPTS

Site 2 is the half block at the northwest corner of 'K' Street and 1st Avenue South. This site contains three parcels to the south with four contributing structures (one of which is an accessory structure to the unit facing 'K' Street). Immediately north of these parcels is a municipal parking lot which contains approximately 65 parking spaces south of the alleyway. The three southern parcels and the parking lot were part of the 2020 RFP (RFP sites 2 and 3 respectively) however there were no proposals submitted for these properties.

The municipal lot has been considered for a future parking structure and the engineering firm WGI has developed a number of different proposals testing the physical feasibility of that idea. Option G depicts one of the concepts that WGI produced. The images to the right illustrate the 'K' Street locations. Different concepts were developed for the 'K' Street sites and character sketches of those concepts are provided below. The design team took care to reflect the historic architectural character of Lake Worth Beach in the design proposals.

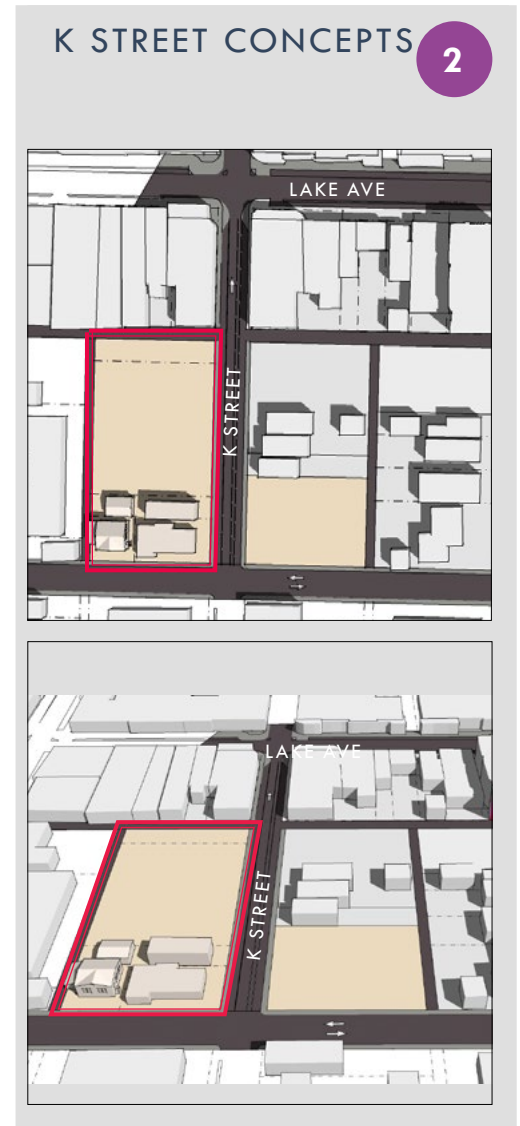


Figure 6 K Street Redevelopment Concept



# II. TOUR OF THE SCENARIOS

CONTRIBUTING STRUCTURES SUMMARY	
	Notes
f	Built 1925, listed at 1 DU on property appraiser, 878-sf of gross building sf
g	Built 1928, listed at 2 DU on property appraiser, 1710-sf of gross building sf
h	Built 1927, listed at 1 DU on property appraiser, 959-sf of gross building sf



## K STREET CONCEPTS 2

This page identifies the existing contributing structures on Site 2 - 'K' Street. The structures "g" and "h" are on separate parcels and structure "f" has an existing accessory dwelling unit to the rear. At the time of the charrette these properties were in a significant state of disrepair. Since the charrette, the structures identified as "f" "g" and "h" have been approved for demolition by the City.

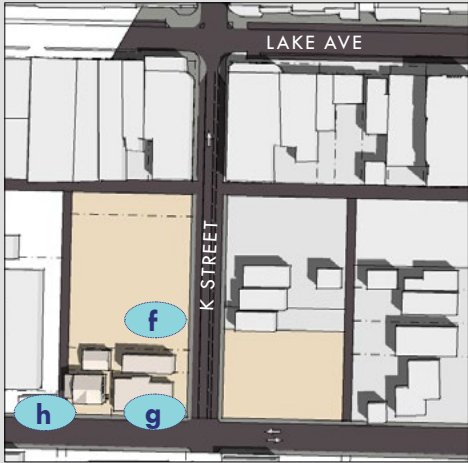


Figure 7 Images of the contributing structures along K Street.

**OPTIONS**  
SITE 2

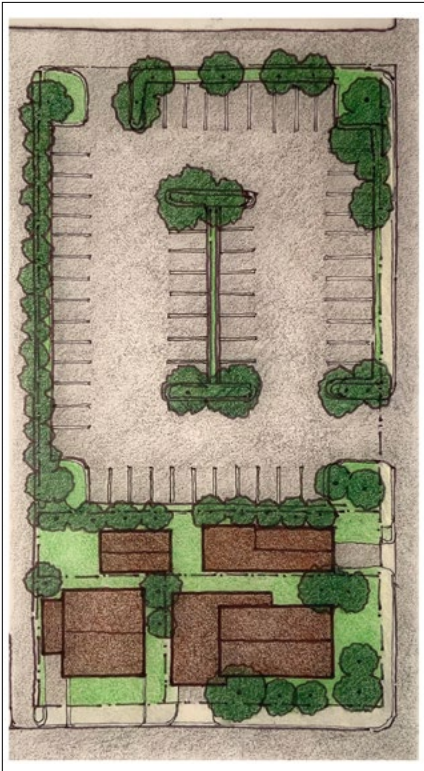


Figure 8  
Existing Conditions

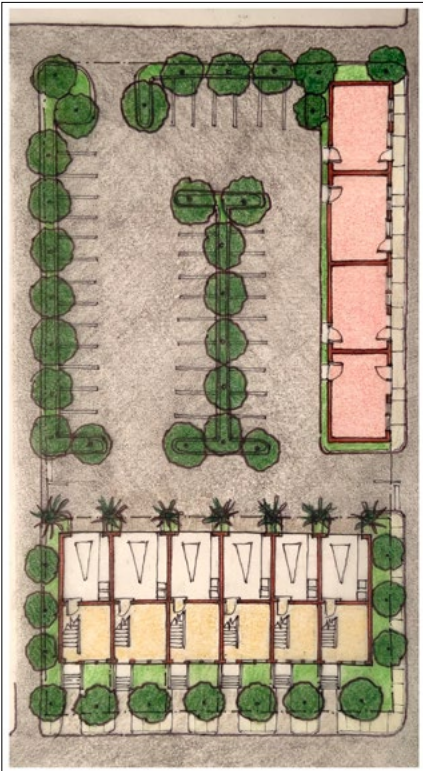


Figure 9  
First Avenue S townhouse option with liner building facing K Street

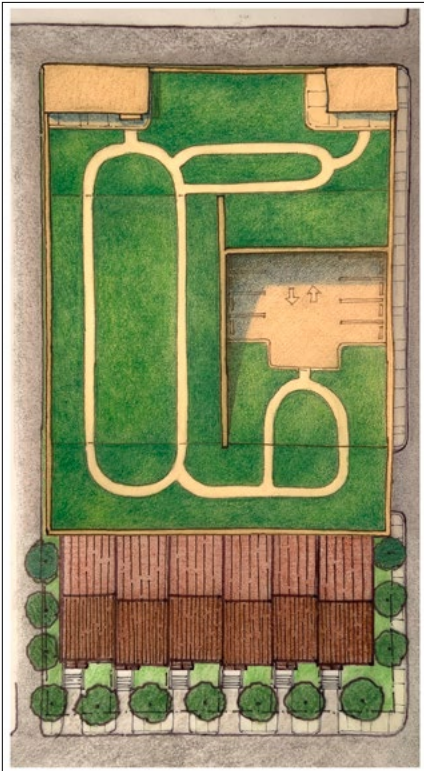
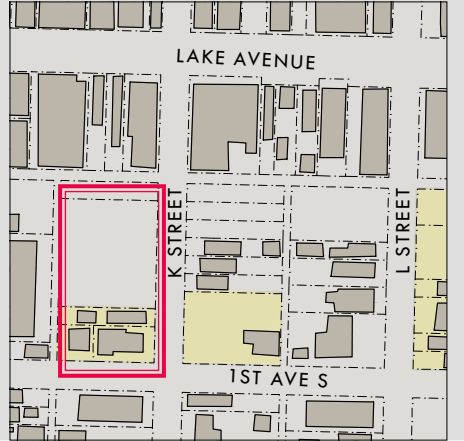


Figure 10  
First Avenue S townhouse with parking deck in the municipal parking lot

K STREET CONCEPTS **2**

Because of the condition of the existing buildings at Site 2, the design team proposed replacing them with a few different options for redevelopment.

The drawing to the far left is the existing conditions. The center drawing illustrates a townhouse proposal with a commercial liner building along 'K' Street. The image to the right shows townhouses on 1st Avenue South and a green-roofed parking deck.



**OPTION D**

**SITE 2**

<b>GROSS SITE AREA</b>	1.085 acres
<b>NUMBER OF TOTAL UNITS</b>	10 DU (9 du/acre)
<b>1 BEDROOM, STUDIO UNITS</b>	10 DU (loft live-work studio)
<b>TWO BEDROOMS</b>	0
<b>3+ BEDROOMS</b>	0
<b>GROSS COMMERCIAL SPACE</b>	1,840-sf
<b>PARKING SPACES</b>	88 parking spaces
<b>ON-STREET</b>	20 existing to remain
<b>SURFACE</b>	57 existing to remain
<b>STRUCTURE</b>	0
<b>SELF PARKED</b>	11 parking
<b>CONTRIBUTING STRUCTURES</b>	2 relocate & renovate (1,840-sf)

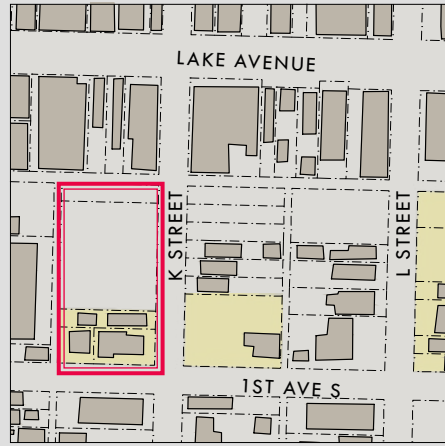


**ARTIST STUDIO UNIT** (10 DU) 2-Story Loft Units    sf 8,250

**BIERGARTEN SITE** Potential historic structure relocation site

**K STREET CONCEPTS 2**

Option D for Site 2 proposes keeping the existing parking lot and building artist lofts facing 1st Avenue South. This concept includes a rear yard for welding and smelting if desired. There was interest during the charrette to provide more working artist space.



OPTION D  
SITE 2

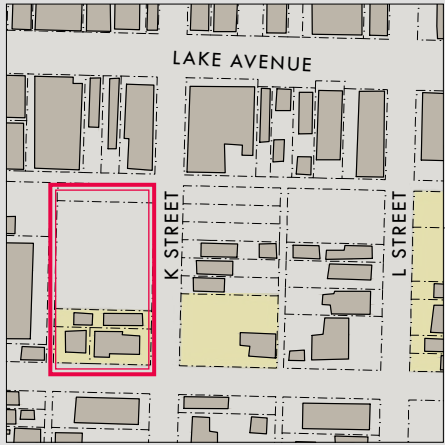


K STREET CONCEPTS 2

OPTION D SUMMARY

- Surface parking lot to remain
- Exiting on-street parking to remain, but improved with landscaped curb extensions
- Beer garden with historic structures & existing trees to remain (1,840-sf)

**\*Since the charrette, the structures identified as "f" and "h" have been approved for demolition by the City.**

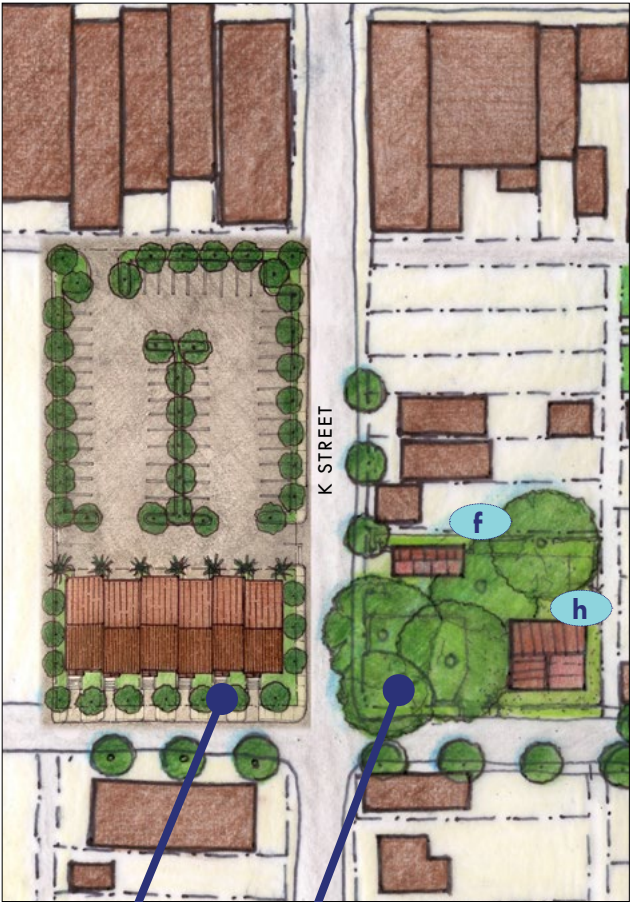


**OPTION E**  
SITE 2

<b>GROSS SITE AREA</b>	1.085 acres
<b>NUMBER OF TOTAL UNITS</b>	6 DU (6 du/acre)
<b>1 BEDROOM, STUDIO UNITS</b>	0
<b>TWO BEDROOMS</b>	0
<b>3+ BEDROOMS</b>	6 DU (townhouse)
<b>GROSS COMMERCIAL SPACE</b>	1,840-sf
<b>PARKING SPACES</b>	83 parking spaces
<b>ON-STREET</b>	20 existing to remain
<b>SURFACE</b>	57 existing to remain
<b>STRUCTURE</b>	0
<b>SELF PARKED</b>	6 in private garage
<b>CONTRIBUTING STRUCTURES</b>	2 relocate & renovate (1,840-sf)

<b>3+ BEDROOMS</b>	(6 DU) 3- Story Townhouse	sf 17,280
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<b>BIERGARTEN SITE</b>	Potential historic structure relocation site
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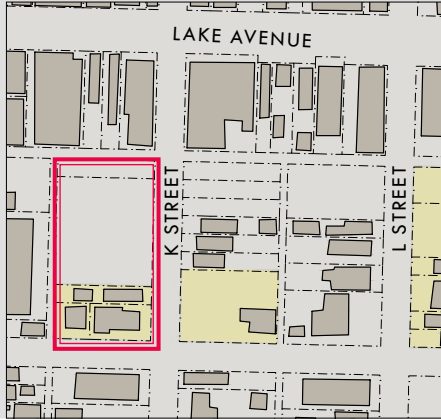


**K STREET CONCEPTS 2**

**OPTION E SUMMARY**

- 6 self parked townhouse units
- Surface parking lot to remain
- Existing on-street parking to remain, but improved with landscaped curb extensions
- Beer garden with historic structures & existing trees to remain (1,840-sf)

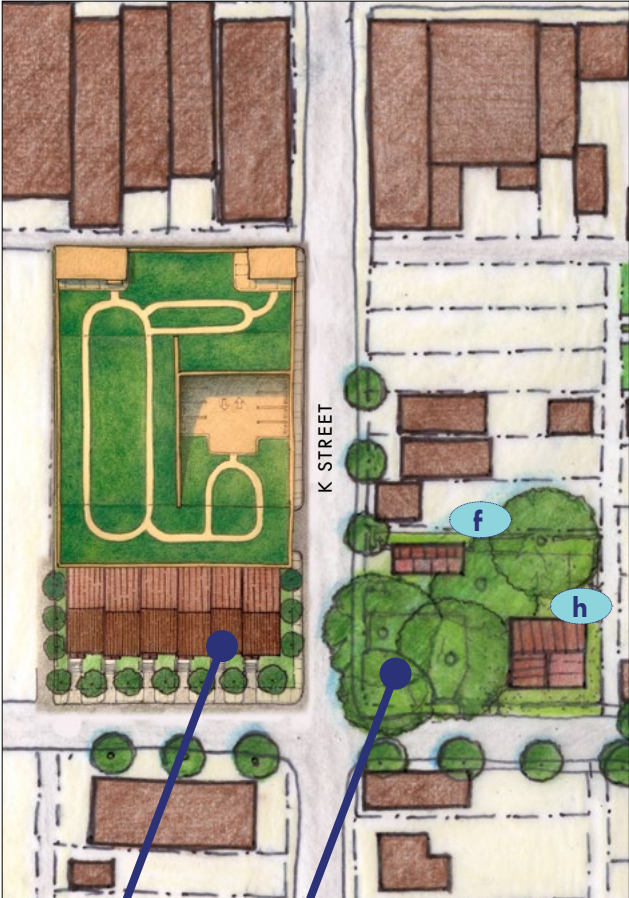
**\*Since the charrette, the structures identified as "f" and "h" have been approved for demolition by the City.**





**OPTION F**  
SITE 2

<b>GROSS SITE AREA</b>	1.085 acres
<b>NUMBER OF TOTAL UNITS</b>	6 DU (6 du/acre)
<b>1 BEDROOM, STUDIO UNITS</b>	0
<b>TWO BEDROOMS</b>	0
<b>3+ BEDROOMS</b>	6 DU (townhouse)
<b>GROSS COMMERCIAL SPACE</b>	4,400-sf
<b>PARKING SPACES</b>	166 parking spaces
<b>ON-STREET SURFACE</b>	+/- 20 existing to remain
<b>STRUCTURE</b>	+/- 140
<b>SELF PARKED</b>	6 in private garage
<b>CONTRIBUTING STRUCTURES</b>	2 relocate & renovate (1,840-sf)



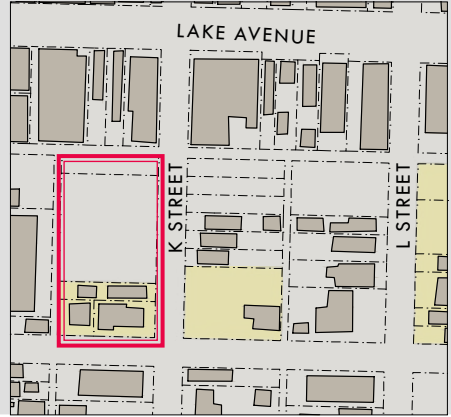
<b>3+ BEDROOMS</b>	(6 DU) 3- Story Townhouse	sf 17,280
<b>BIERGARTEN SITE</b>	Potential historic structure relocation site	

**K STREET CONCEPTS 2**

**OPTION F SUMMARY**

- 6 self parked townhouse units
- New Structured parking with green active use rooftop
- Exiting on-street parking to remain, but improved with landscaped curb extensions
- Small commercial linear (5,400-sf)
- Beer garden with historic structures & existing trees to remain (1,840-sf)

**\*Since the charrette, the structures identified as "f" and "h" have been approved for demolition by the City.**

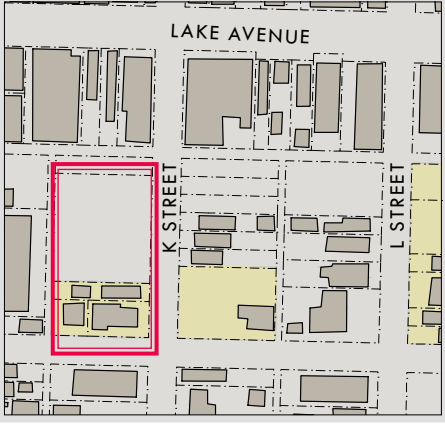


**OPTION G**  
**SITE 2**



**K STREET CONCEPTS** **2**

- OPTION G SUMMARY**
- Hired by the CRA, WGI produced concepts for a public parking garage on Site 2.
  - WGI Option 3 develops the entire site from the alleyway to 1st Ave. South to create a public parking garage with a retail space on the ground level.
  - 4 levels of public parking
  - 256 parking spaces
  - 3,800sf of ground level retail space



1ST AVENUE CONCEPTS

The CRA owns the vacant parcel at the northeast corner of 1st Avenue South and 'K' Street. While not part of the 2020 Request for Proposals, the fact that the parcel is in public ownership, is vacant, and sits between sites 1 and 2 of this study led the design team to include it in the public discussion.

The community provided many ideas for this site: a public pool, a park and play ground, and even more municipal buildings. One idea that seemed interesting and plausible was for this parcel to become a receiving site for any of the existing contributing structures that might need to be relocated in order to accommodate more efficient redevelopment at Sites 1 and 2. Since the charrette process these buildings have been approved for demolition by the CRA with support from the City.

Along with that theme developed the idea of a Biergarten - a German concept of an indoor/outdoor restaurant and ale house. It was thought that was concept fit nicely with the bohemian artistic culture of Lake Worth Beach.

Currently the CRA is studying the site for an affordable housing concept. Drawings for the redevelopment of this site are currently underway.

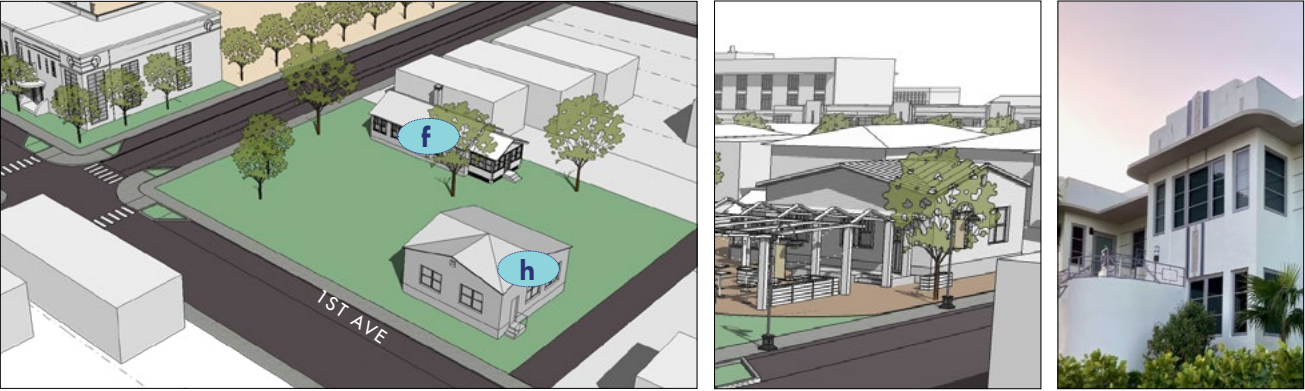
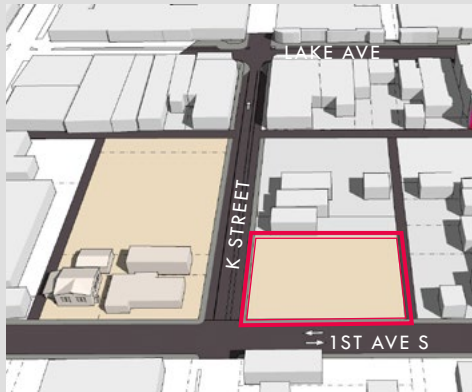
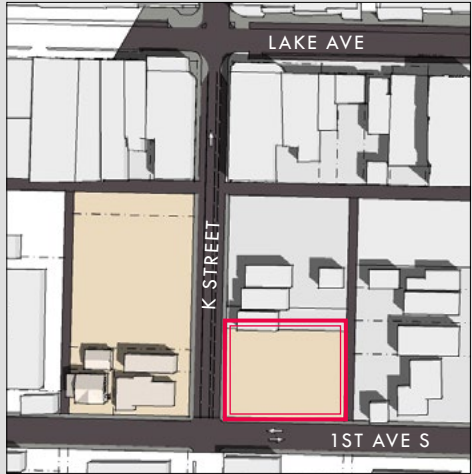


Figure 11 Biergarten Concept with relocation and rehabilitation of contributing structures. For photographs of the existing structures see "Figure 7 Images of the contributing structures along K Street." on page 31

1ST AVE S CONCEPTS

3



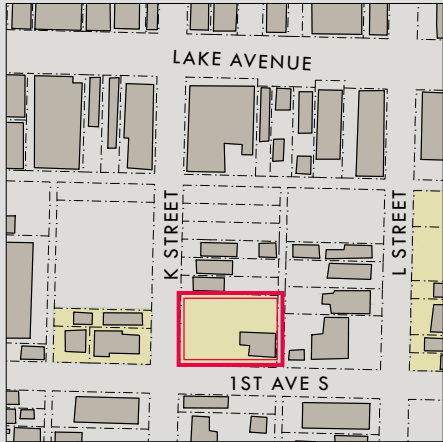
**OPTION**  
**SITE 3**



**1ST AVE S**  
**CONCEPTS**



The image to the left illustrates the Biergarten concept looking to the northeast from the corner of 'K' Street and 1st Avenue South. Below is a location map for the site highlighted in red.



OPTION  
SITE 3



FIGURE 14 AFFORDABLE HOUSING MICRO UNITS  
LOCATED IN WEST PALM BEACH, FL



FIGURE 13 RAILROAD AVE. APARTMENTS  
LOCATED IN WINTER PARK, FL

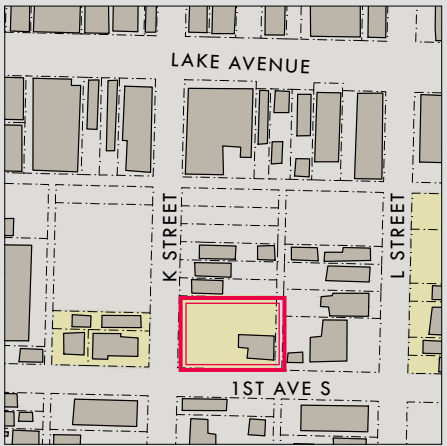


FIGURE 12 HERITAGE TRUST RENOVATION  
LOCATED IN MIAMI BEACH, FL

1ST AVE S  
CONCEPTS



Images to the left represent local affordable housing options in South Florida. The discussion of developing affordable housing on the site is ongoing, and drawings for this concept are currently being developed by a not for profit agency.

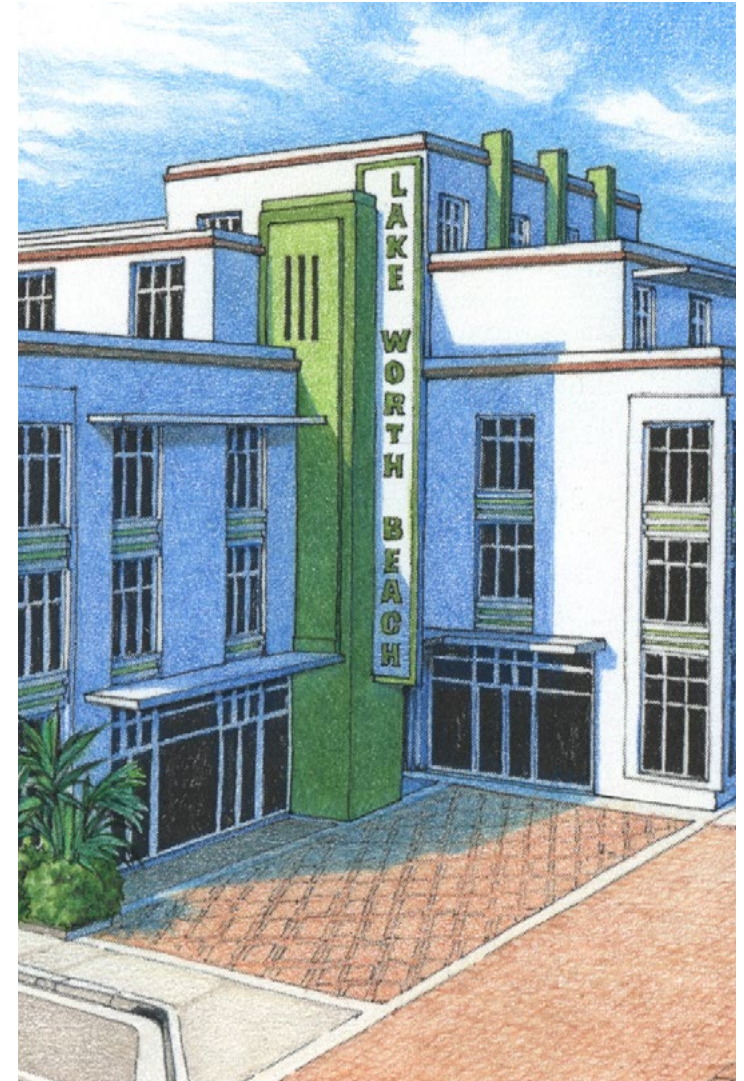


## SCENARIO ANALYSES

A critical component of this planning study is to test the financial feasibility of the recommended proposals. Considering the innumerable internal and external factors (no precise design proposal, restoration and/or relocation of existing contributing structures, material and labor costs, inflation, and increasing interest rates) it is impossible to provide precise project costs at this conceptual stage. That said, providing a planning-level financial analysis of each of the design scenarios is important to determine if the desired approaches are at all possible. Is it feasible to redevelop these sites in a small-scaled incremental fashion? And if so, what subsidies (of various types) might be required to achieve these objectives?

After the completion of the design charrette the TCRPC team re-evaluated all of design scenarios presented in Chapter II of this report. For the sake of efficiency, the decision was made to focus on Site 1 - 'L' and 'M' Street for the financial analysis. Further, scenarios B and C were determined to be the most practical from a development perspective and also the most palatable to the community. The incorporation of some, if not all, of the existing contributing structures was an important factor in making those decisions.

This section includes a summary of the financial pro-formas that were run for three design concepts (B and C and an updated scenario C) as well as the Fairfax & Sammons proposal. The Fairfax & Sammons analysis was developed because there has been so much community interest in their designs. Also included are four pro-formas (Cv3 - Cv6) incorporating various adjustments to the assumptions to make the project more economically viable.



## SCENARIO PRO-FORMAS

Illustrated here are the three scenarios for which financial analyses were developed. An early financial analysis of Scenario C resulted in slight revisions to the plan resulting in an increase in the number of residential units. The Scenario C Final Option presented in Chapter II of this report is the most current and is identified as TCRPC Option Cv6 in the following summary of financial analyses. To date this is the recommended option because it provides the greatest mix of units while maintaining the scale and character of the historic district.



Figure 15 The plate above is of Scenario B from the design charrette



Figure 16 The rendering above is of the Fairfax & Sammons counter proposal

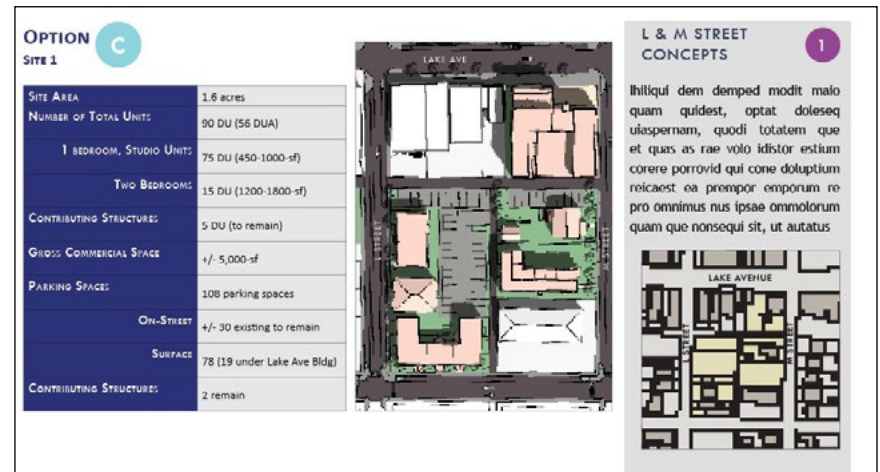


Figure 17 The plate above is of Scenario C from the design charrette

### III. DESIGN SCENARIO ANALYSES

Below is a summary of the results of the financial analyses for the four different options. As discussed earlier, TCRPC Option Cv2 is the most current version of that scenario and is the concept presented earlier in this report. TCRPC Option C was an earlier version of the plan and that analysis resulted in revisions to generate more residential units hence the generation of TCRPC Cv2. A discussion of these findings, and options for improving development conditions and potential City and CRA participation are discussed on the following page.

	TCRPC Option C v2	TCRPC Option C	TCRPC Option B	Fairfax Plan
Units	91	79	64	65
New Units	84	79	54	54
Units in Existing Buildings	7	0	10	11
Average Unit Size (sf)	601	638	664	908
Commercial Sf	5000	7100	7100	5805
Parking Spaces	108	108	115	
<b>Total Costs</b>	<b>\$ 22,147,959</b>	<b>\$ 21,414,284</b>	<b>\$ 19,218,355</b>	<b>\$ 23,163,399</b>
Vertical	\$ 12,289,000	\$ 11,637,367	\$ 9,957,153	\$ 11,623,343
Land	\$ 4,650,000	\$ 4,650,000	\$ 4,650,000	\$ 4,650,000
Hard Land Dev	\$ 1,089,850	\$ 1,073,850	\$ 998,750	\$ 1,475,845
Soft Land Dev	\$ 1,667,976	\$ 1,641,271	\$ 1,499,058	\$ 2,197,984
TI Allowance and Leasing	\$ 176,728	\$ 250,889	\$ 250,889	\$ 174,150
Construction Mgmt, GC OH, Supervision	\$ 1,605,462	\$ 1,525,346	\$ 1,314,708	\$ 1,594,717
Construction Contingency	\$ 668,943	\$ 635,561	\$ 547,795	\$ 797,359
<b>Total Revenue Year 4 (Stabilization)</b>	<b>\$ 1,856,336</b>	<b>\$ 1,749,108</b>	<b>\$ 1,339,374</b>	<b>\$ 1,705,975</b>
<b>Net Operating Income Year 5</b>	<b>\$ 1,081,414</b>	<b>\$ 967,310</b>	<b>\$ 781,254</b>	<b>\$ 991,200</b>
Debt Service Coverage Year 3	0.65	0.60	0.63	0.84
Return on Equity	-18.02%	-25.20%	-22.43%	-29.66%
<b>Pre-tax Profit with Year 5 Exit</b>	<b>(\$4,941,140)</b>	<b>(\$5,951,949)</b>	<b>(\$4,940,296)</b>	<b>(\$5,362,958)</b>
<b>Equity Multiple (Yx)</b>	<b>-0.74</b>	<b>-0.93</b>	<b>-0.86</b>	<b>-0.77</b>





## PRO-FORMA SUMMARY

The summary of the design scenario financial analyses on the previous page includes:

- The proposed development program for each option
- Total project costs (total hard and soft development costs, cost of the land, leasing, management, etc.)
- Year 4 stabilization revenue (assumes two years of construction and two years of leasing - ideally 94% occupancy at year 4)
- Debt service coverage (ratio of net operating income to debt ratio - lenders look for a revenue to debt ratio of at least 1.2)
- Return on equity (assumes developer sells project after 5 years as a percentage)
- Pre-tax profit at year 5 exit (return on equity at year 5 sale in dollars versus percentage)

Focusing on TCRPC Cv2 in the financial summary, the total project cost is \$22,147,859 which includes \$4,650,000 (full recovery of the City and CRA purchase expenditures) for the 'L' and 'M' properties. The debt service coverage in year 3 is only 0.65 (versus the lender goal of 1.2). The return equity in the year 5 exit (sale) is -18.02% or a net loss of \$4,941,140. This is clearly not a desirable project as outlined. There are, however, variables to consider and some assumptions made in developing the analysis that could be adjusted.

The rental rates incorporated in the analysis range from \$2.22/sf to \$2.73/sf. This equates to a monthly rent of \$1,445 per month for a 530 sf unit and \$2,195 per month for a 900 sf unit. These rental rates were established during the charrette in April 2022 using CoStar data sources looking at local comparable project rental rates. These are considered market rate and could be adjusted upwards to improve the financial feasibility of the project. The provision of affordable housing (or units at a reduced rate) however would require some degree of subsidy.

A major factor in the results of the financial analyses is the cost of the land. One option is for the City or the CRA to consider a long-term ground lease for the land for 75-99 years instead of selling the land outright. This requires less developer investment up front. The developer may not sell the project in 5 years for as much as if they owned the land but it might make the project doable.

Additional analyses (TCRPC Options Cv3-Cv6) were conducted to understand what modifications to the project costs are necessary (land cost reduction, long-term lease, increased rental rates, etc.) to make the project work. Version TCRPC Cv6 is the "Option C Final Version" concept plan found in Chapter 2 of this report. The results of that additional analysis is provided on the next page.

### III. DESIGN SCENARIO ANALYSES

This table is a revised summary of the scenario pro-formas including a new model run for TCRPC Option Cv3 - Option Cv6. Both of the new model runs maintain the same design and development program as the earlier versions. This most recent analysis adjusts the model inputs until the project is attractive for investors. A more detailed discussion on TCRPC Options Cv3 - Cv6 is provided on the following page.

	New Option C v6	TCRPC Option C v5	TCRPC Option C v4	TCRPC Option C v3	TCRPC Option C v2	TCRPC Option C	TCRPC Option B	Fairfax Plan
Units	87	96	91	91	91	79	64	65
New Units	80	89	84	84	84	79	54	54
Units in Existing Buildings	7	7	7	7	7	0	10	11
Average Unit Size (sf)	683	621	601	601	601	638	664	908
Average Residential Rent/Unit	\$ 1,935	\$ 1,820	\$ 1,785	\$ 1,785	\$ 1,587	\$ 1,668	\$ 1,705	\$ 1,966
Average Residential Rent/sf	\$ 2.80	\$ 2.90	\$ 2.94	\$ 2.94	\$ 2.61	\$ 2.62	\$ 2.57	\$ 2.30
Commercial Sf	5000	5000	5000	5000	5000	7100	7100	5805
Parking Spaces	108	108	108	108	108	108	115	
Total Costs	\$ 20,670,705	\$ 20,721,687	\$ 17,405,248	\$ 19,445,124	\$ 22,147,959	\$ 21,414,284	\$ 19,218,355	\$ 23,163,399
Vertical	\$ 13,305,960	\$ 13,333,693	\$ 12,289,000	\$ 12,289,000	\$ 12,289,000	\$ 11,637,367	\$ 9,957,153	\$ 11,623,343
Land	\$ 2,000,000	\$ 2,000,000	\$ -	\$ 2,000,000	\$ 4,650,000	\$ 4,650,000	\$ 4,650,000	\$ 4,650,000
Hard Land Dev	\$ 1,083,450	\$ 1,097,850	\$ 1,089,850	\$ 1,089,850	\$ 1,089,850	\$ 1,073,850	\$ 998,750	\$ 1,475,845
Soft Land Dev	\$ 1,655,564	\$ 1,657,249	\$ 1,575,266	\$ 1,615,141	\$ 1,667,976	\$ 1,641,271	\$ 1,499,058	\$ 2,197,984
TI Allowance and Leasing	\$ 179,532	\$ 179,532	\$ 176,728	\$ 176,728	\$ 176,728	\$ 250,889	\$ 250,889	\$ 174,150
Construction Mgmt, GC OH, Supervision	\$ 1,726,729	\$ 1,731,785	\$ 1,605,462	\$ 1,605,462	\$ 1,605,462	\$ 1,525,346	\$ 1,314,708	\$ 1,594,717
Construction Contingency	\$ 719,471	\$ 721,577	\$ 668,943	\$ 668,943	\$ 668,943	\$ 635,561	\$ 547,795	\$ 797,359
Total Revenue Year 4 (Stabilization)	\$ 2,211,587	\$ 2,288,709	\$ 2,188,530	\$ 2,124,786	\$ 1,856,336	\$ 1,749,108	\$ 1,474,972	\$ 1,672,524
Annual Ground Lease Payments (Initial)	\$ -	\$ -	\$ 100,000	\$ -	\$ -	\$ -	\$ -	\$ -
Net Operating Income Year 5	\$ 1,459,431	\$ 1,522,360	\$ 1,414,744	\$ 1,385,545	\$ 1,081,414	\$ 999,888	\$ 781,254	\$ 971,765
Debt Service Coverage Year 4	1.29	1.35	1.54	1.31	0.89	0.85	0.74	0.84
Return on Equity with Year 5 Exit	19.50%	21.74%	22.73%	20.00%	-4.48%	-8.18%	-22.43%	-29.66%
Pre-tax Profit with Year 5 Exit (Sale)	\$8,903,178	\$10,282,750	\$9,205,664	\$8,661,744	(\$1,518,413)	(\$2,529,222)	(\$4,940,296)	(\$5,362,958)
Equity Multiple (Yx)	1.44	1.65	1.76	1.48	-0.23	-0.39	-0.86	-0.77
Annual TIF Payments Years 2-11	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	0	0	0	0

## PRO-FORMA SUMMARY FINAL

The summary on the previous page illustrates all of the design scenario financial analyses conducted for the project including the latest and preferred Option Cv6. Highlights of those revised options are listed below:

- TCRPC Option Cv6, the preferred option, provides greater diversity in the proposed unit mix and therefore has a total reduction in units
- The TCRPC pro-forma options were developed to understand what project assumptions and model inputs must be changed to make the project financially feasible. Option Cv6, like other options, considers a land acquisition cost of \$2,000,000
- Option Cv6 adjusts the rental rates upwards by \$200/month across all of the units - this is an increase of \$0.33/sf per unit from \$2.61/sf to \$2.94/sf
- A \$50,000/year Tax Increment Financing (TIF) reimbursement from the CRA to the developer is maintained as part of the financial equation for Option Cv6
- The CRA is scheduled to sunset in 8 years in 2030 so an extension to the CRA lifespan would need to be considered if Cv6 is preferred
- Debt service coverage for Option Cv6 is 1.29 which exceeds the lender minimum of 1.2
- Option Cv6 return on equity at year 5 exit is 19.50% which is at the lower range for investor interest

TCRPC Option Cv6 which has been adjusted from previous options to include larger units is potentially feasible considering the adjustments listed above. It is very important to note the following considerations as well:

- The financial modeling for all of the scenarios was begun during the design charrette in April 2022 and do not reflect recent increases in lending interest rates and the impacts of inflation
- These financial models also do not reflect the most recent City of Lake Worth Beach affordable housing and sustainable building practices ordinances which were adopted on Thursday, October 6, 2022. It is very likely that the requirements of these policies will make projects more expensive to build in downtown and negatively impact these financial analyses

#### CRA Owned Properties to be demolished – Fiscal Year 2022/2023

- 704 1<sup>st</sup> Avenue South
- 710 1<sup>st</sup> Avenue South
- 25 South 'K' Street
- 509 Lake Avenue
- 30 South 'L' Street
- 32 South 'L' Street



As already mentioned, it is important to consider the external factors affecting development costs as well. Since the charrette in April 2022 interest rates have increased significantly, inflation has increased, and the effect on material and labor costs due to the impact of Hurricane Ian are yet to be known.

It is also important to recognize that simply making bigger buildings may not be the solution either. Clearly there was opposition to the larger building proposed through the prior RFP process. In addition, the ability to surface park smaller projects removes the exorbitant costs of structured parking that would come with a larger building.

Since the charrette, the City conducted cost estimates for the renovation of the contributing structures on sites 1 and 2. The determination was made to demolish six structures identified in the map to the left. These demolitions are compatible with the Option C proposal for Site 1 (i.e. Option C assumes that structures “d” and “e” are removed). Structures “f”, “g”, and “h” are to be removed on Site 2.

## KEY RECOMMENDATIONS & IMPLEMENTATION

This chapter focuses on key recommendations and implementation strategies to help ensure that the community input and vision provided throughout the charrette process can be achieved. Providing recommendations and guidance for the creation of a new Request for Proposals (RFP) for all or some of the L, M, and K Street sites has been a core objective of this effort since its inception. This chapter is organized into separate sections to assist with developing the future RFP:

### DESIGN OBJECTIVES

What are the key design and development priorities for these sites as expressed by the community through the public planning process?

### POLICY RECOMMENDATIONS

What policy and code modifications are recommended through this effort to inform the RFP process? A series of diagrams and Land Development Regulation modifications are provided to clarify expectations. Particular elements include building height, densities, provision of open spaces, and maximum building footprints. These recommendations are proposed to be limited to the Old Town Historic District.

### RECOMMENDED DEVELOPMENT STRATEGIES

A series of specific development strategies are provided in a prioritized checklist for the City and CRA to consider when developing the criteria for a future RFP. These include some of the TCRPC Option Cv3 - TCRPC Option Cv6 financial findings outlined in [Chapter III](#).



### DESIGN OBJECTIVES

#### INCREMENTAL DEVELOPMENT

There was public consensus during the charrette process that a smaller, more incremental development pattern is preferred on the subject properties. The tendency for new developments to have larger, sometimes block-sized footprints was deemed inappropriate for the Old Town Historic District. The development scenarios provided in this report and their accompanying financial analysis illustrate those objectives. The image to the right shows a proposed street facade of smaller walk up apartment buildings. If density restrictions are relieved within the study area, a greater number of smaller units in smaller buildings might be achievable.



Figure 18 View looking east

DESIGN OBJECTIVES

MISSING MIDDLE

There is a popular planning concept that has emerged in the last decade that promotes smaller incremental development referred to as the “Missing Middle”. The illustration to the right, developed by Opticos Design, Inc. in Berkley, California clearly illustrates the range of building types and development patterns within the missing middle. As defined by the Opticos group, “Missing Middle Housing is a transformative concept that highlights the need for diverse, affordable housing choices in sustainable, walkable places.”



Figure 20 Missing Middle Housing graphic credit: Opticos Design, Inc.

Similarly, small scale retail and opportunities to grow from start-up to a permanent long-term business were desired. The image below illustrates incremental retail options and how they can grow from temporary to permanent.



Figure 19 Incremental Retail credit: Thomspson Placemekng

DESIGN OBJECTIVES

CONCEALED AND EXPOSED PARKING

The provision of adequate vehicle parking is an essential component of maintaining healthy and vibrant business environments. The quantity and location of on-site parking requirements can also become a detriment to pedestrian movements and the quality of a place. Conventional standards of front-loaded parking lots, and the requirement of an over-abundance of parking spaces, has resulted in the degradation of the public realm and made the pedestrian and non-motorized environments challenging. Buildings located closer to the street are easier to access by transit users and other pedestrians and bicyclists.

The existing Lake Worth Beach code regulates a good urban approach to the provision of parking. The future RFP should include parking location diagrams, similar to the ones to the right, that clearly identify appropriate parking locations.

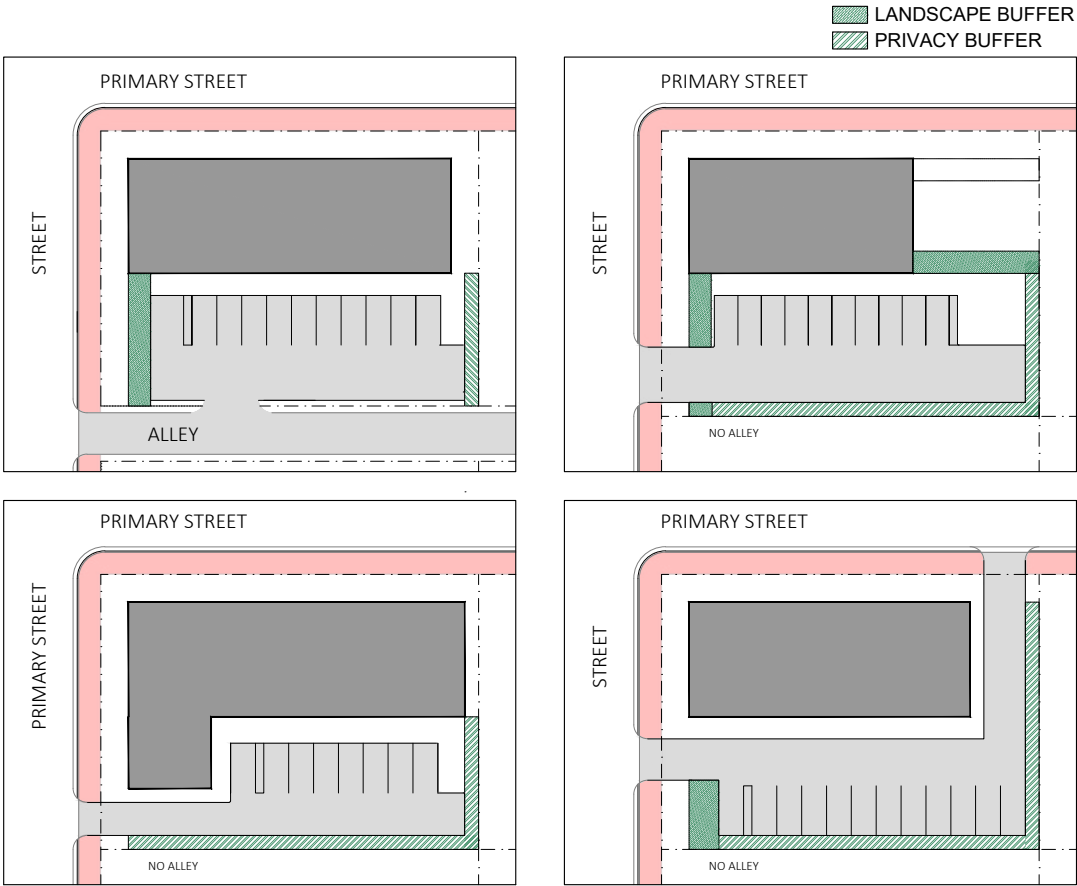


FIGURE 21 PARKING LOCATIONS



DESIGN OBJECTIVES

SMALLER AND MORE AFFORDABLE UNITS

The provision of affordable housing, in Palm Beach County and the region, is increasingly challenging. The dramatic increase in real estate values and the reluctance of many communities to accept higher densities or more residential development at all has exacerbated the issue. The City of Lake Worth Beach is confronting the same affordability issues and, as of the writing of this report, approved a new affordable housing ordinance in October 2022.

There are great debates about whether all areas of a city should be required to provide affordable housing. Is it necessary to require affordable units on the most valuable properties (i.e. Main Street) if those units can be more feasibly provided a block away and still provide easy access to shopping and transit?

This report recommends exempting the small Old Town Historic District from affordable housing requirements and also exempting the district from maximum density requirements. This strategy is proposed to accommodate a greater number of smaller units in buildings that are more contextual with the district.



Figure 22 Missing middle housing types credit: Opticos Design, Inc., TCRPC



## POLICY RECOMMENDATIONS

The City of Lake Worth Beach has a very sophisticated urban code that prioritizes the creation of memorable places and emphasizes sustainability at all levels. This particular project is limited to the previously discussed parcels on South “K” Street and the block between South “L” Street and South “M” Street. All of the parcels examined in this report have a DMU (Downtown Mixed-Use East) Future Land Use designation. The parcels at the southwest corner of South “M” Street and Lake Avenue have a zoning designation of DT (Downtown) which permits a base building height of two-stories and a maximum density of 40 du/acre. Additional density and a building height of up to five-stories is achievable by utilizing the city’s sustainability bonuses.

The remaining parcels have a zoning designation of MU-E (Mixed-use East) which permits a base building height of two-stories and a maximum density of 30 du/acre. Additional densities and height of up to four stories is achievable through the sustainability incentives.

The existing parking rate requirements for the downtown zoning districts are fairly progressive and have shared-use reductions built into the regulations today.



# POLICY RECOMMENDATIONS

## OLD TOWN HISTORIC DISTRICT

All of the parcels examined in this report are located within the Old Town Historic District (see image to the right). The Old Town Historic District is one of six historic districts within the city and was established by city ordinance in 1996. As part of the district, modifications, additions, and new construction on the subject parcels are reviewed by the city’s Historic Resources Preservation Board and are to be consistent with the City of Lake Worth Beach Historic Preservation Design Guidelines. In addition, improvements and new construction must comply with the U.S. Secretary of the Interior standards for historic preservation.

As the only historic district in downtown, it is not an exaggeration to suggest that the parcels within the Old Town Historic District are some of the most sensitive to redevelopment within the city. As new development is proposed in this district a heightened degree of predictability and compatibility with the existing context is warranted. The public opposition to the previous “Element” RFP submittal for the subject properties, which engendered this planning effort, is evidence of the community’s desire to maintain the historic character of the area.

As is outlined earlier in this chapter, the community input gained during the charrette process overwhelmingly supported a smaller, more incremental infill development at the South “K” Street and South “L” and “M” Street parcels. The financial analyses of the different redevelopment scenarios provided in Chapter III of this report illustrate the difficulties in achieving the desired development pattern while providing a project that is financially feasible. A series of policy and code recommendations are provided on the following page for consideration by the City Commission and staff. These are in no way a critique of existing policies and regulations but rather suggest ways to tailor those requirements to this unique and defined downtown historic district.



Figure 23 Image: Map of the Old Town Historic District



Figure 24 This image is of the beautifully restored 14 South “M” Street structure which currently houses the city’s Leisure Services Dept.

## POLICY RECOMMENDATIONS

### OLD TOWN HISTORIC DISTRICT

Throughout this planning effort the design team considered, and debated, many modifications to existing regulations and policies to achieve the desired redevelopment objectives. While it may seem counter-intuitive, achieving greater predictability may require loosening some of the current restrictions. Below is a list of potential strategies for consideration in the Old Town Historic District.

1. Remove all maximum density requirements within the district. This would allow for a greater number of smaller units and potentially increase affordability.
2. Exempt the district from all existing sustainability incentive requirements.
3. For those properties facing Lake and Lucerne Avenues allow three-story building height as of right. Allow for up-to five stories with the provision of 15% civic open space as defined in this document. Maximum building footprint not to exceed 15,000 sf.
4. For those properties facing the N-S side streets south of Lake Avenue allow up-to three stories as of right with a maximum building footprint of 5,000 sf.
5. Reduce parking requirements to 1 space per unit and 2 spaces per 1,000 sf. of non-residential uses. Allow for off-site and on-street parking accommodations.
6. Exempt the Old Town Historic District from the recently approved affordable housing and sustainable building ordinances. While these are excellent policies for the city to pursue, there is concern that within the limited area of the district where land values are very high and the expectations are for smaller buildings with high quality architectural design aesthetics, those policies will make it very difficult to achieve the redevelopment goals outlined in this document.



Figure 25 Lake Worth Beach Historic Preservation Design Guidelines



Figure 26 Historic Art Deco in Downtown Lake Worth Beach

POLICY RECOMMENDATIONS

BUILDING HEIGHT

The height of buildings shall be measured in and regulated by the number of stories. Stories are measured from the floor to the bottom of the lowest structural member that supports the story above, see Figure 27.

- The ground story of commercial or mixed-use buildings shall be 10 feet to 18 feet tall.
- The ground story of residential buildings shall be from 9 feet to 14 feet tall.
- Each story above the ground story in all buildings must be from 8 feet to 12 feet tall; any upper story taller than 12 feet will count as two stories for the purpose of measuring building height.
- Mezzanines that exceed 15% of the floor area are counted as stories for the purpose of measuring height.

FIGURE 28 BUILDING HEIGHT		
A	Maximum Number of Stories	5 Stories
B	Ground Floor Finish Level	18" min.
C	Ground Story Height	10' min. / 18' max.
D	Upper Story Height	8' min. / 12' max.
E	Parapet Height <sup>1</sup>	Existing zoning applies

<sup>1</sup> Structures for the housing of elevators, stairways, skylights, or similar facilities are permitted if necessary to conceal rooftop utilities. May be erected no more than forty (40) percent above the measured building height of the building on which such structures are located.

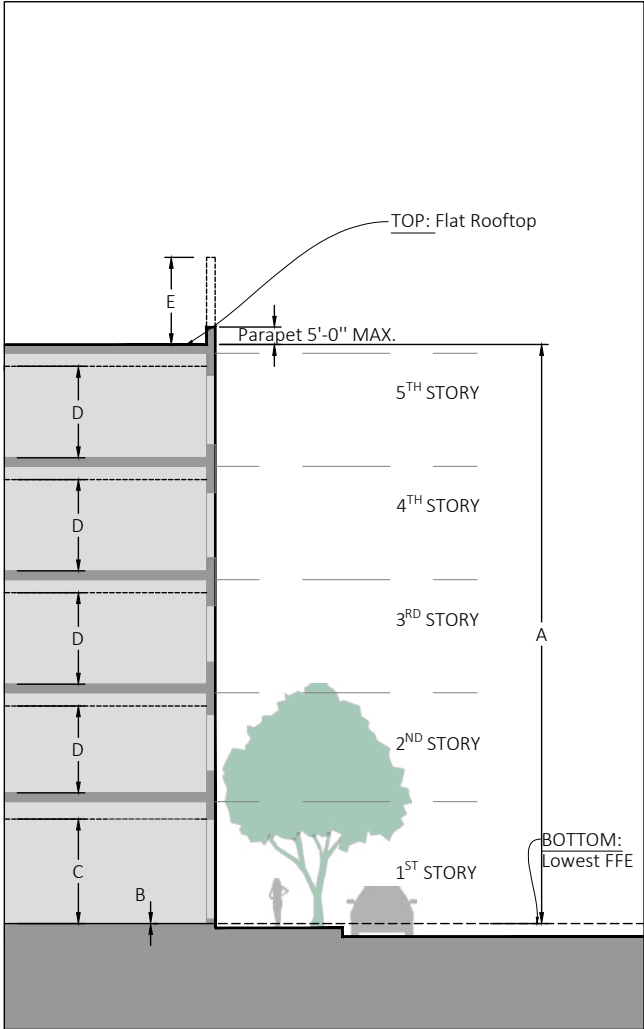


FIGURE 27 MEASURING BUILDING HEIGHT

POLICY RECOMMENDATIONS

BUILDING HEIGHT

Regulating building height by the number of stories, rather than the number of feet, results in a built scale that is predictable to both lay-people and potential developers. Limiting overall building height solely by it's height in feet can inadvertently encourage developers to maximize building height, and then subdivide into as many stories as possible. Conversely, limiting building height by the number of stories results in authentic architectural variation among buildings and higher, more desirable ceiling heights.

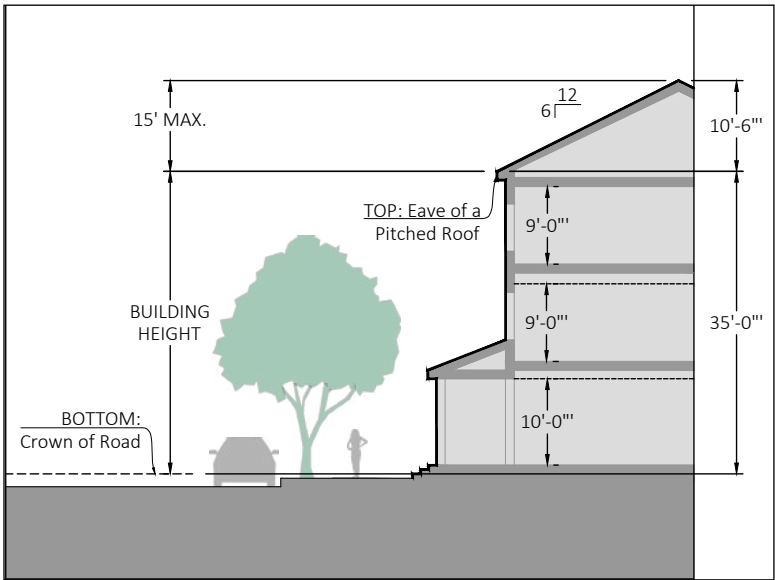


FIGURE 29 BUILDING HEIGHT

POLICY RECOMMENDATIONS

CIVIC OPEN SPACE

Civic open space requirements, particularly when provided as an incentive for greater development, must be clearly defined as usable public open space in the form of parks, greens, and public squares. The included alternative civic open space configurations, diagram is a potential tool to more clearly define how future development civic open space requirements should be delivered.

Even smaller civic open spaces in urban environments can provide surprisingly desirable places for respite, dog walking, or outdoor dining.

The diagrams to the right define a variety of civic open space types and provide dimensional criteria. Every effort should be made, especially where building height incentives are considered to provide civic open spaces of the highest quality.

The parameters described in this table should be considered a practical guide and not limit creativity or application.

FIGURE 30 OPEN SPACE CONFIGURATIONS DIAGRAM

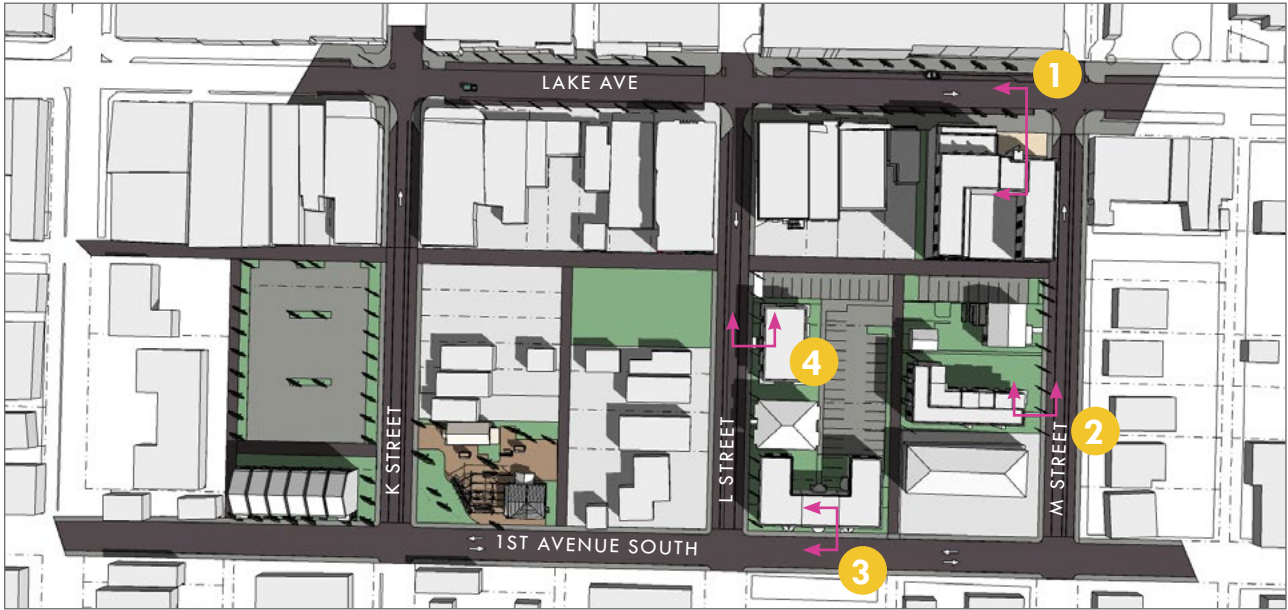
	SIZE	DESCRIPTION	ILLUSTRATION
<b>SQUARE</b>	≥ 10,000 sf	A square adjoins streets on at least three sides. Squares may be up to 50% hardscaped, with formal landscaping and shade trees. Squares accommodate both passive uses and community gatherings.	
<b>ATTACHED GREEN</b>	2,000 to 6,000 sf	An attached green spans the entire length of a block. Attached greens shall be at least 30 feet wide and are appropriate on the short end of a block. Attached greens are primarily lawns with formally arranged landscaping and shade trees.	
<b>COURTYARD</b>	Courtyard space ratio of height to width: Min. = 1:1 Max. = 1.5:1	An uncovered area for pedestrians partly or wholly enclosed by buildings or walls and used primarily for supplying access, light, and air to abutting buildings.	
<b>GREEN</b>	1,000 to 5,000 sf	A continuous area for pedestrians which is open from the ground level to the sky for its entire width and length, the primary feature of which is a landscaping scheme that incorporates garden elements including trees, palms, shrubs, or ground cover, as well as water elements including a fountain or pond.	
<b>PLAZA</b>	1,000 to 43,000 sf	Fronts on the street and is directly accessible to the public at all times for use by the public for passive recreational purposes. The ground level of the plaza shall be constructed principally of hard-surfaced materials. An existing unimproved area between or next to a building or buildings shall not qualify. Should not be near another plaza.	
<b>PLAYGROUND</b>	There is no minimum or maximum size	An open space designed and equipped for the recreation of children, and should be fenced and may include an open shelter. Playgrounds may be included in parks and greens.	

POLICY RECOMMENDATIONS

STREETSCAPE

There are many different types of streets. Even within the limited study area of this report there are particular physical nuances to the existing streets that need to be appropriately addressed with new development. The following series of diagrams and street sections illustrate desired streetscape conditions surrounding the “L” and “M” block.

The plan below is a key to the detailed sections provided on the following pages. Each of the locations identified (1-4) highlight specific conditions recommended in the TCRPC Option C scenario. These, or similar, diagrams and sections should be provided as part of a future RFP so applicants have a clear understanding of how their proposal is expected to address the street.



LAKE AVE SECTION 1

Frontage includes civic open space and a maximum building height fronting a primary street

M STREET SECTION 2

3 story apartments, new landscape bulb-outs with shade trees

1ST AVE SECTION 3

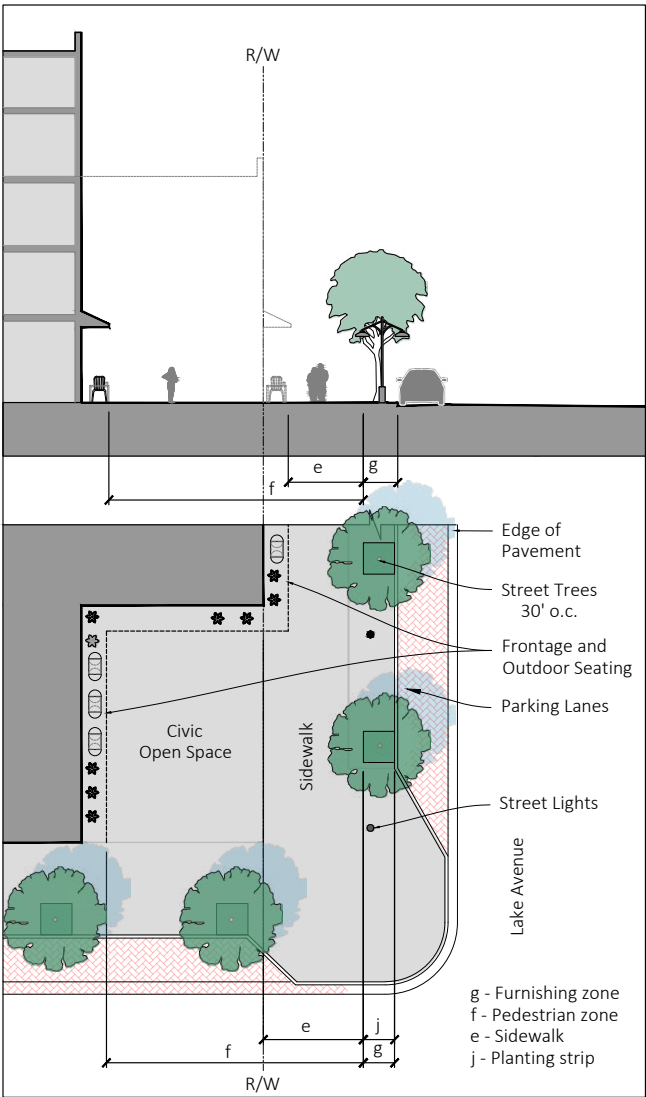
2 story loft units, new landscape bulb-outs with shade trees

L STREET SECTION 4

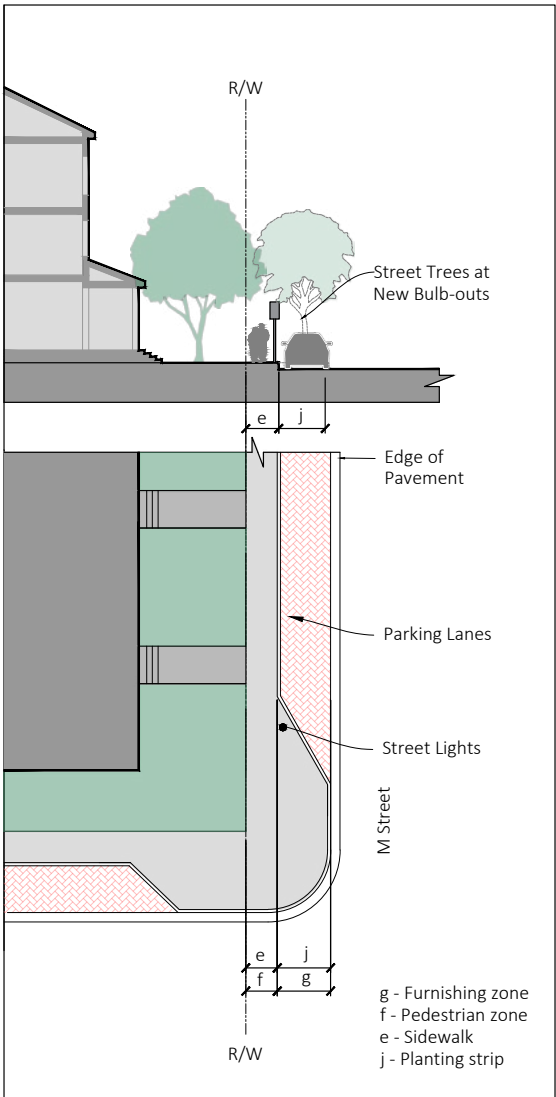
3 Story apartment, new landscape bulb-outs with shade trees



# IV. KEY RECOMMENDATIONS & IMPLEMENTATION



**FIGURE 31** LAKE AVENUE STREETScape



**FIGURE 32** "M" STREET STREETScape

## LAKE AVE SECTION 1

The Lake Avenue street section is the location where incentives are recommended to provide civic open space. As one of the primary main streets in Lake Worth Beach, a high quality Lake Avenue frontage is essential. The section (far left) is cut through the civic open space illustrating a plaza treatment at the corner of Lake and South "M" Street.

## "M" STREET SECTION 2

South "M" Street is more residential in character and has slightly deeper front setbacks to match the existing buildings and a residentially scaled sidewalk. This section (left) is cut through the proposed three-story residential building in TCRPC Option Cv3 scenario. On-street parking is to be maintained and enhanced if possible.

# IV. KEY RECOMMENDATIONS & IMPLEMENTATION

## 1ST AVE SECTION

3

The First Avenue South section (far left) is more urban than “L” and “M” Streets, reflecting the existing conditions. This includes smaller front setbacks and in this case the section is cut through the proposed two-story residential lofts building. On-street parking is to remain and be added on to.

## “L” STREET SECTION

4

The South “L” Street section is very similar to that of South “M” Street. There are slightly deeper front setbacks and those should be consistent with the existing historic walk up apartment building. Like the other sections, corner bulb outs should be considered at the intersections to capture the on-street parking and reduce pedestrian crossing distances.

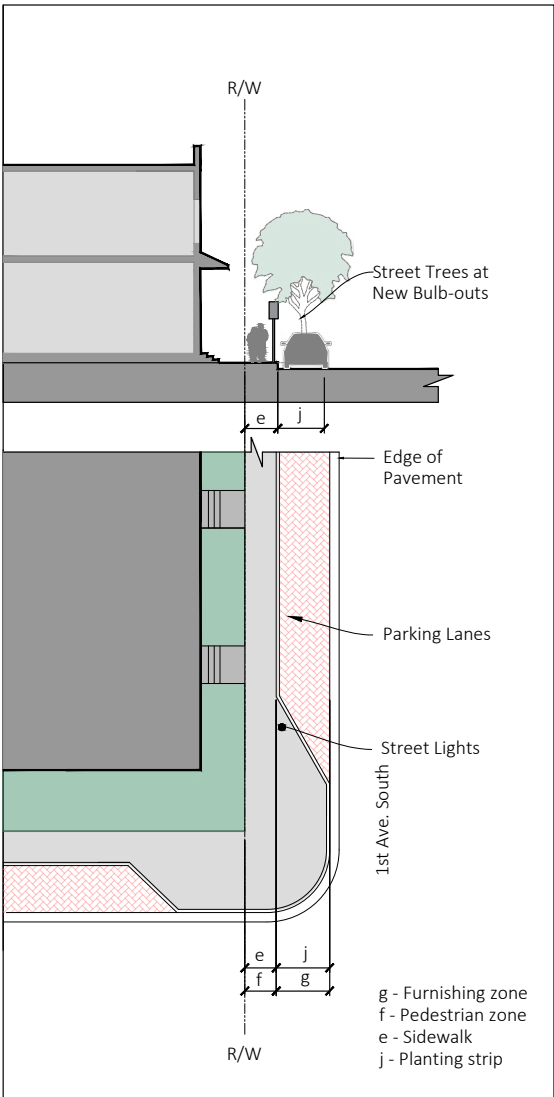


FIGURE 33 1ST AVE. SOUTH STREETSCAPE

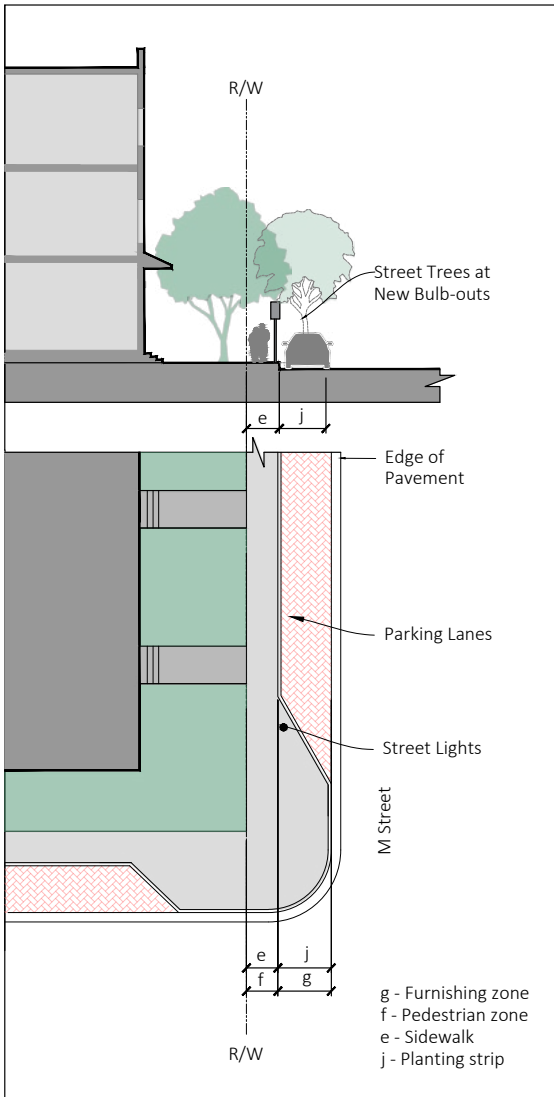


FIGURE 34 “L” STREET STREETSCAPE

POLICY RECOMMENDATIONS

STREETScape

The sections below illustrate the subtle changes in streetscapes as they transition from strictly residential conditions to commercial and mixed-use conditions. The specific dimensions for the Furnishing Zone, Pedestrian Zone, outdoor seating or planting areas may vary based upon existing conditions and the limits of a project’s scope of work. For the purposes of a future RFP, the City and CRA may want to provide precise dimensions, a range of dimensions, or a minimum dimension for each zone depending upon the conditions on the ground.

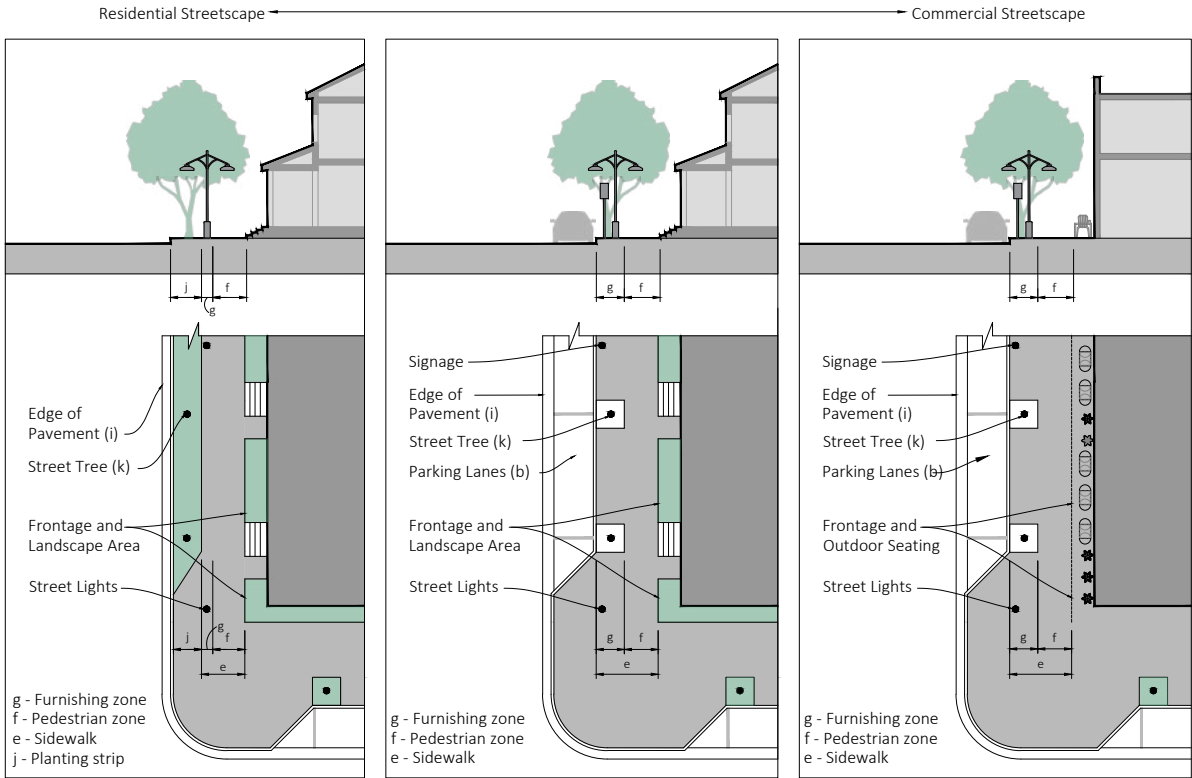


Figure 35 Residential streetscape conditions for townhouses in Delray Beach

FRONTAGE STANDARDS

Frontage types describe the way that different buildings address the street through their entry features and other defining elements. Not all frontage types are appropriate for all streets. As an example, a single-family bungalow porch (top right) is probably not appropriate for new development on Lake Avenue. Similarly, a storefront type (bottom right) is probably not appropriate for 1st Avenue South. This section of the recommendations identifies a variety of frontage types that would be applicable within the study area. The South “L” and “M” Street block is a transition block from Lake Avenue to the neighborhoods so it is important to be sensitive to the appropriate building frontages.

The figure below identifies which frontage types are appropriate for which streets. The following pages provide detailed drawings and descriptions of each frontage type.

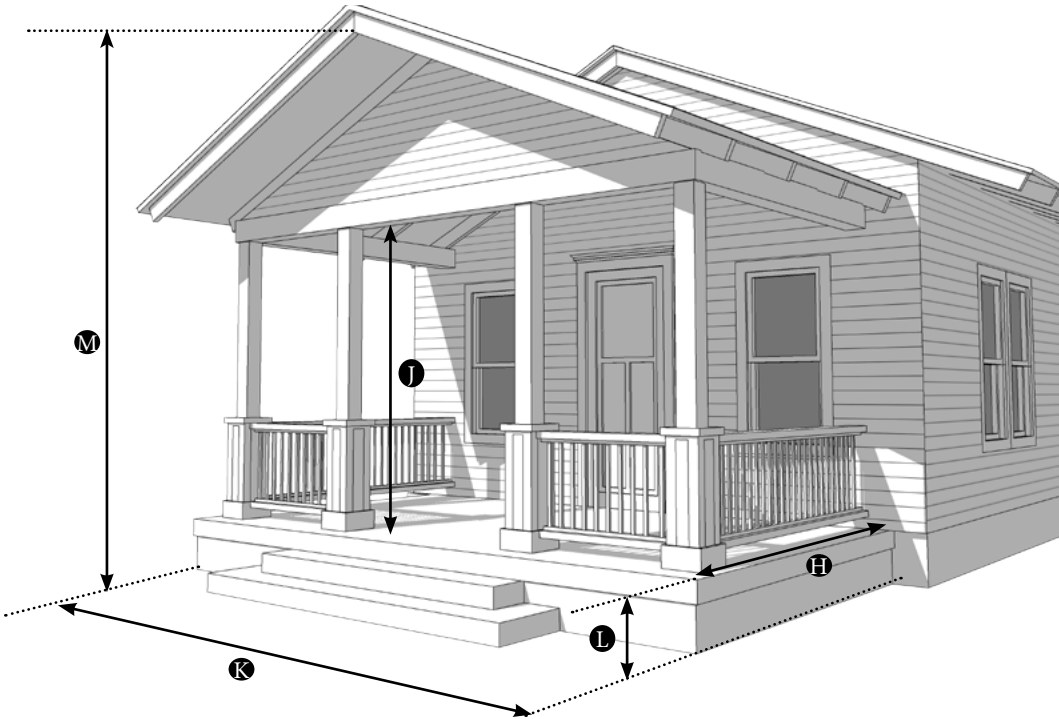


FIGURE 36 PERMITTED FRONTAGE TYPES MATRIX

SITE 1				
PERMITTED FRONTAGE TYPES	LAKE AVENUE	1ST STREET SOUTH	M STREET	L STREET
Porch	✗	✓	✓	✓
Stoop	✗	✓	✓	✓
Bracketed Balcony	✓	✓	✓	✓
Forecourt	✓	✓	✓	✓
Arcade	✓	✗	✗	✗
Shopfront	✓	✗	✗	✗

FRONTAGE STANDARDS

FIGURE 37 PORCH FRONTAGE



DESCRIPTION

A porch is an open-air structure attached to a building forming a covered entrance large enough for comfortable use as an outdoor room. Front porches may be screened.

DIMENSIONS

Depth	6 feet min. 8 feet preferred	H
Height, clear	8 feet min.	J
Width, length of facade	40% min.	K
Finish level above finished grade	21 inches min.	L
Height, stories	2 stories max.	M
Set back from curb	Not applicable	-



FRONTAGE STANDARDS

FIGURE 38 STOOP FRONTAGE



**DESCRIPTION**

A stoop is a small staircase leading to the entrance of a building that may be covered. The elevation of the stoop is necessary to ensure privacy for residential uses in the ground story of buildings. Stoops should provide sufficient space for a person to comfortably pause before entering or after exiting the building.

**DIMENSIONS**

Depth	5 feet min.	H
Height, clear	8 feet min.	J
Width, clear	4 feet min.	K
Finish level above finished grade	21 inches min.	L
Height, stories	1 story max.	M
Set back from curb	Not applicable	-



FRONTAGE STANDARDS

FIGURE 39 BRACKETED BALCONY FRONTAGE



**DESCRIPTION**

A bracketed balcony is a second-story balcony, that creates a semi-public space overlooking the street above a main entry or unit. Bracketed balconies are typically associated with buildings with commercial uses in the ground story; however, bracketed balconies may be used with residential uses and in combination with a storefront or a stoop.

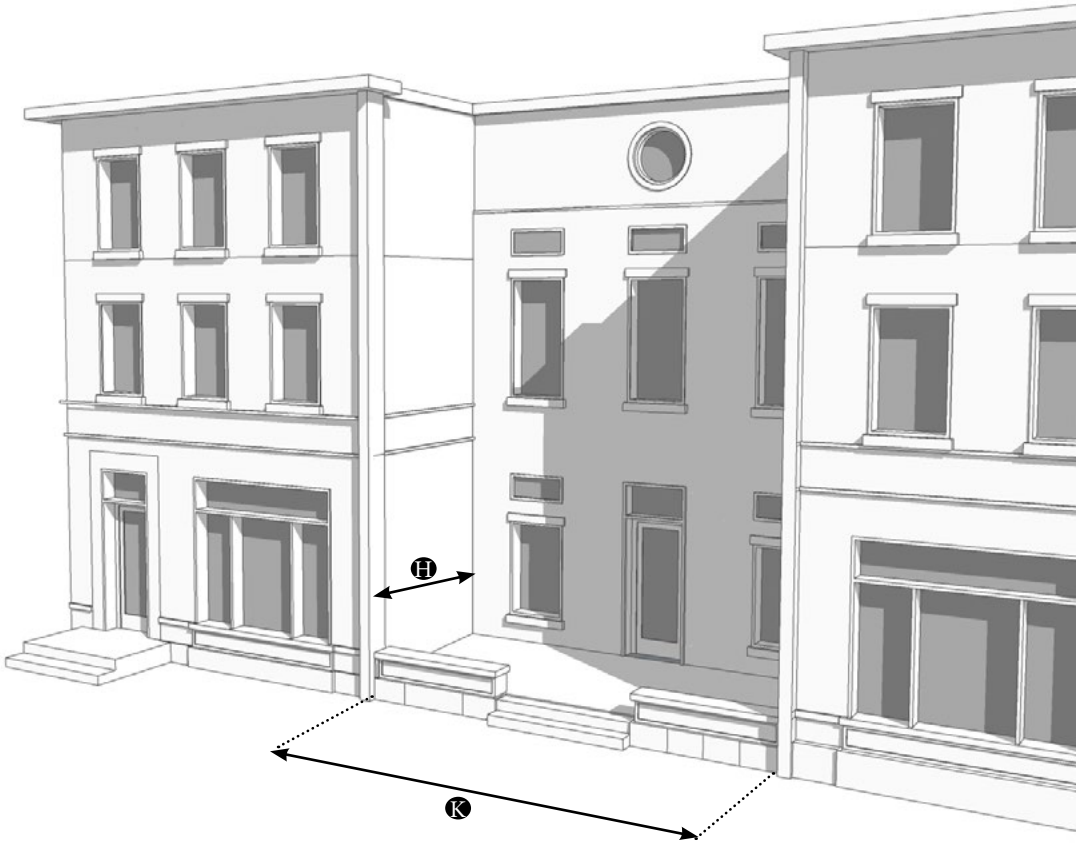
**DIMENSIONS**

Depth	5 feet max.	H
Height, ground level clear	10 feet min.	J
Width	4 feet min.	K
Finish level above finished grade	Not applicable	-
Height, stories	Not applicable	-
Set back from curb	Not applicable	-



FRONTAGE STANDARDS

FIGURE 40 FORECOURT FRONTAGE



DESCRIPTION

A forecourt is an open area in front of the main building entrance(s) designed as a small garden or plaza. Low walls or balustrades no higher than three feet six inches in height when solid may enclose the forecourt. Forecourt walls are constructed of similar material as the principal building or are composed of a continuous, maintained hedge. A forecourt may afford access to one or more first floor residential dwelling units or incorporate storefronts for commercial uses. Forecourts are typically associated with multifamily, mixed-use, and commercial buildings.

DIMENSIONS

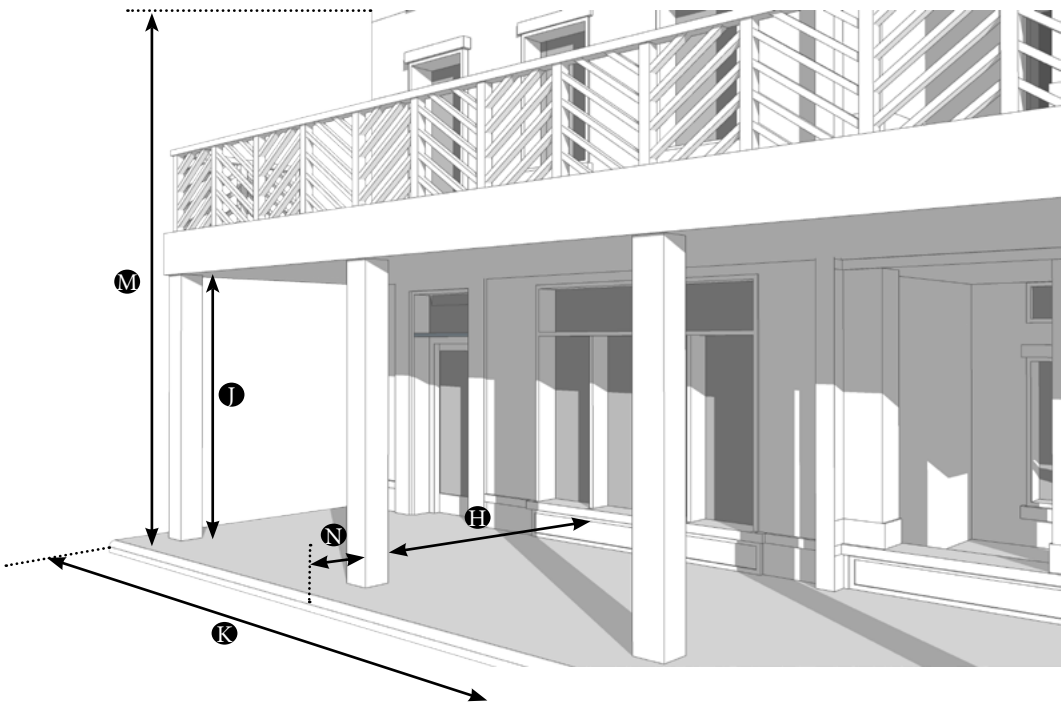
Depth, clear	20 feet max.	H
Height, clear	Not required	-
Width, length of facade	12 feet min. / 50% of facade max.	K
Finish level above finished grade	Not required	-





FRONTAGE STANDARDS

FIGURE 41 ARCADE FRONTAGE



**DESCRIPTION**

An arcade is a covered, unglazed, linear hallway attached to the front of a building, supported by columns or pillars. The arcade extends into the public right-of-way, over the streetscape area, creating a shaded environment ideal for pedestrians. This frontage type is typically associated with commercial uses. Arcades shall remain open to the public at all times. In the case where an arcade encroaches into the public right-of-way, a right-of-way maintenance agreement may be required.

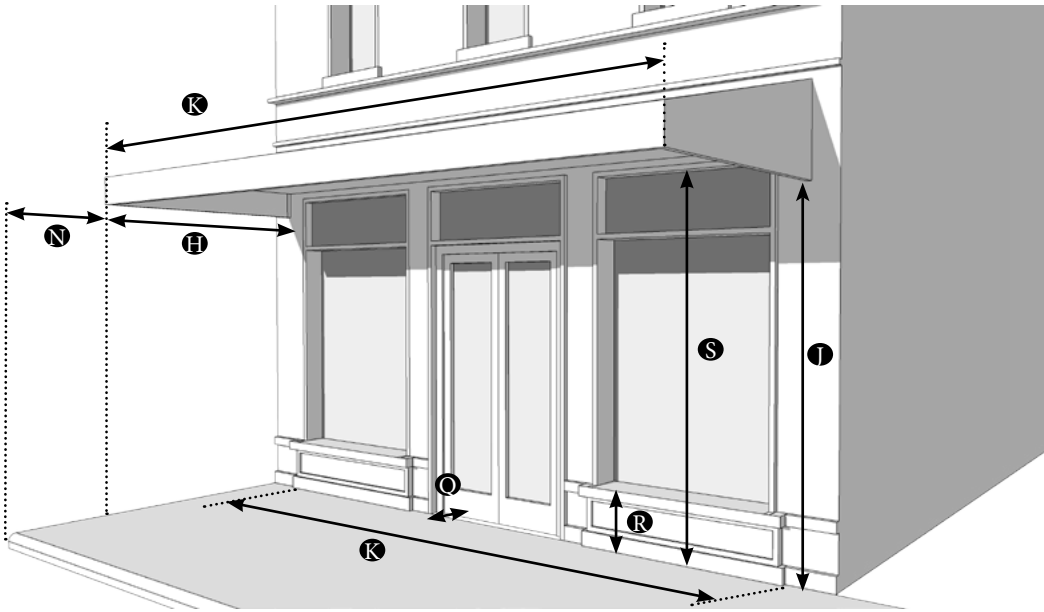
**DIMENSIONS**

Depth, clear	8 feet min.	H
Height, ground level clear	10 feet min.	J
Width, length of facade	70% min.	K
Finish level above finished grade	at sidewalk level	-
Height, stories	2 stories max.	M
Set back from curb	2 feet min. / 4 feet max.	N



FRONTAGE STANDARDS

FIGURE 42 SHOPFRONT FRONTAGE



DESCRIPTION		
The shopfront is a frontage type along the sidewalk level of the ground story, typically associated with commercial uses. Shopfront are frequently shaded by awnings or arcades.		
DIMENSIONS		
Width, length of facade	70% min.	K
Door recess	10 feet max.	C
Storefront base	1 foot min. / 3 feet max.	R
Glazing height	8 feet min.	S
OPTIONAL AWNING		
Depth	3 feet min.	H
Height, ground level clear	8 feet min.	J
Width, length of facade	70% min.	K
Set back from curb	2 feet min.	N



# IV. KEY RECOMMENDATIONS & IMPLEMENTATION

As discussed earlier, a key element of this planning effort is to assist the City and CRA with design concepts, graphics, and financial data and analysis that might become part of a future Request for Proposals for the South “L” and “M” sites. The preferred design scenario identified in Chapter II is the “TCRPC Option C Final Version” with version Cv3 - Cv6 of the financial analyses as a development direction.

The table below is a synopsis of all of the considerations and recommendations from this report consolidated in a single format for easy reference. Any RFP issued for the subject sites in the future should include a checklist of requirements incorporating the recommendations of this report to facilitate implementation and predictability.

Each of the items listed below will require discussion and acceptance/modification by the City Commission and staff prior going into effect.

DEVELOPMENT STRATEGIES
Adopt or Accept this planning document and TCRPC Option Cv6 as the preferred direction for future redevelopment
Identify financial feasibility analyses TCRPC Option Cv3, Cv4, Cv5, and/or TCRPC Options Cv6 as the preferred development direction, going into effect reduced sale price or long-term lease, TIF reimbursement, and market rate rentals
Consider zoning and policy direction changes specific to the Old Town Historic District (OTHD) to include: <ul style="list-style-type: none"><li>• In order to assure clarity and transparency for future development proposals, limit development incentives to only those properties facing Lake and Lucerne Avenues for the provision of civic open space</li><li>• Remove residential density maximums for development in the OTHD</li><li>• Adjust allowable building heights, as of right, to three stories for those properties facing Lake and Lucerne Avenues and the properties facing the N-S side streets south of Lake Avenue. Only those properties facing Lake and Lucerne Avenues are eligible for increased building height up to five stories with the provision of civic open space</li><li>• Maximum building footprint for those properties facing Lake and Lucerne Avenues is 15,000 sf. Maximum building footprint for those properties facing the N-S side streets south of Lake Avenue is 5,000 sf.</li><li>• Reduce required on-site parking standards to 1 space per residential unit and 2 spaces/1,000 sf. of non-residential uses</li><li>• Exempt the OTHD from the recently adopted affordable housing and sustainable building ordinances</li></ul>



# IV. KEY RECOMMENDATIONS & IMPLEMENTATION

DEVELOPMENT STRATEGIES (CONT'D)
Consider the “K” Street sites for redevelopment - possibly affordable housing
Include the Historic Preservation Design Guidelines in the future RFP and emphasize its importance
Consider using the Streetscape Standards for the “L” and “M” sites as provided in this report
Consider using the Frontage Type Standards for the “L” and “M” sites as provided in this report
Identify locations for off-site parking and provisions for payment-in-lieu of parking specific to the OTHD area
Establish a methodology for developing any future RFP and/or regulatory revisions that includes the City, the CRA, and staff from key departments
Establish a methodology and collaborative public information campaign that describes and clarifies the roles the City, the CRA, staff, and the private sector development community have in implementing redevelopment within the OTHD
To the extent possible, foster a collaborative and supportive environment between the community, the public and private sectors recognizing that any redevelopment, regardless of its scale or character, cannot occur in a timely or positive fashion in acrimonious circumstances

While some of these recommendations are specific and measurable action items, some are more aspirational and procedural. The ultimate success of this effort will likely require all facets discussed. Establishing a positive and predictable project development, review, and approval process, which has a level of community support, will benefit the entire effort.



# APPENDIX A

CREATION OF THE PLAN



## OUTREACH

Public outreach and participation was an essential ingredient in the creation of this plan and recommendations. Many forms of outreach and opportunities were provided so that all who were interested in the process could participate.

### INDIVIDUAL INTERVIEWS

As part of the initial outreach and information reconnaissance for the project, TCRPC conducted over 30 individual interviews with the elected officials, City and CRA staff, CRA board members, and property and business owners. The interviews provided valuable information for the TCRPC team and helped those in the community understand the issues to be addressed and the process that was utilized.

### PUBLIC DESIGN CHARRETTE

A five-day public design charrette has held at the HATCH 1121 Event Space from Saturday, April 30, 2022 to Wednesday, May 4, 2022. The public workshop was that Saturday. The design team worked in the HATCH “studio” which was open to the public from 9:00 am until 10:00 pm Sunday through Tuesday and 9:00 am to 5:00 pm on Wednesday.



Figure 43 Citizen table at Charrette workshop.



Figure 44 Citizen table at Charrette workshop.



Figure 45 Work-in-progress presentation as part of Charrette.



The Saturday public workshop and the open-to-the-public studio environment were immensely helpful in creating continuous and meaningful dialogue and connection between the design team and the community.

## WORK-IN-PROGRESS

A Work-in-Progress presentation was given the evening of Wednesday, May 18, 2022 at City Hall and was the first opportunity for the public to see the design work and recommendations and provide their feedback and input.

Since that time the TCRPC team has been refining the recommendations and developing multiple financial analyses for the various design scenarios created with the community.

The public outreach will continue after the submittal of this report as there will be additional public presentations and meetings to review and discuss these recommendations.

The following pages include images from the charrette as well as each of the plans developed by the community.



TABLE 1

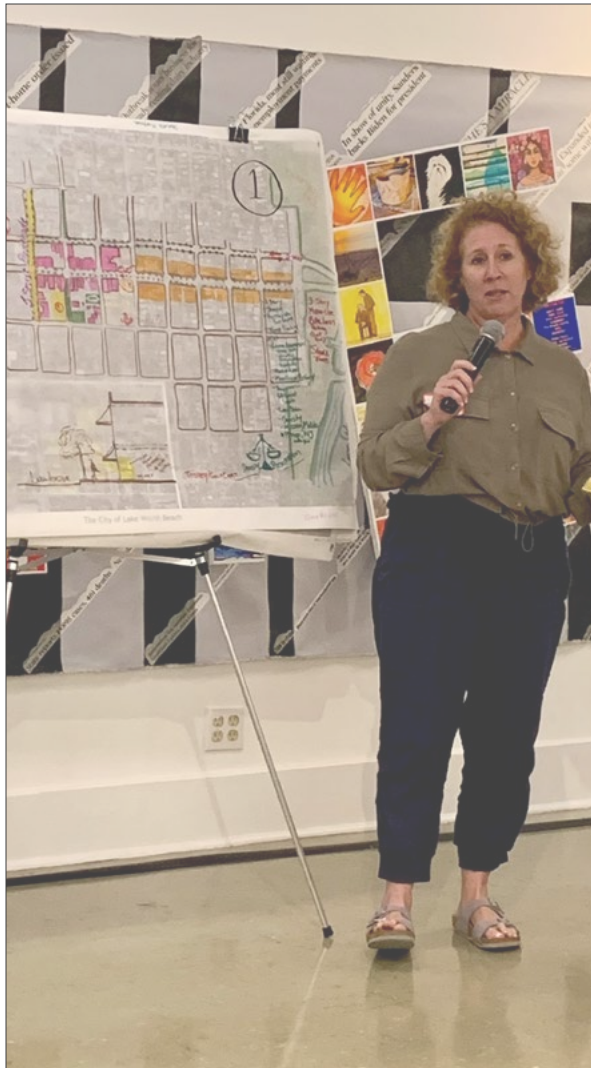


TABLE 2



TABLE 3



Figure 46 Citizen's presenting their workshop ideas



TABLE 4



TABLE 5



TABLE 6

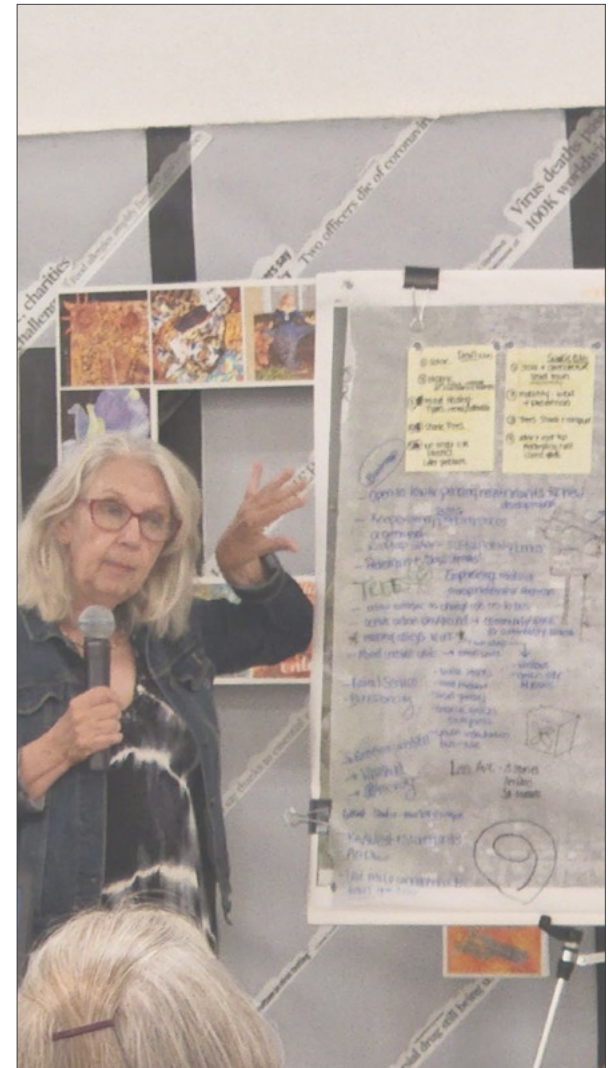


Figure 47 Citizens presenting their workshop ideas

TABLE 7



TABLE 7

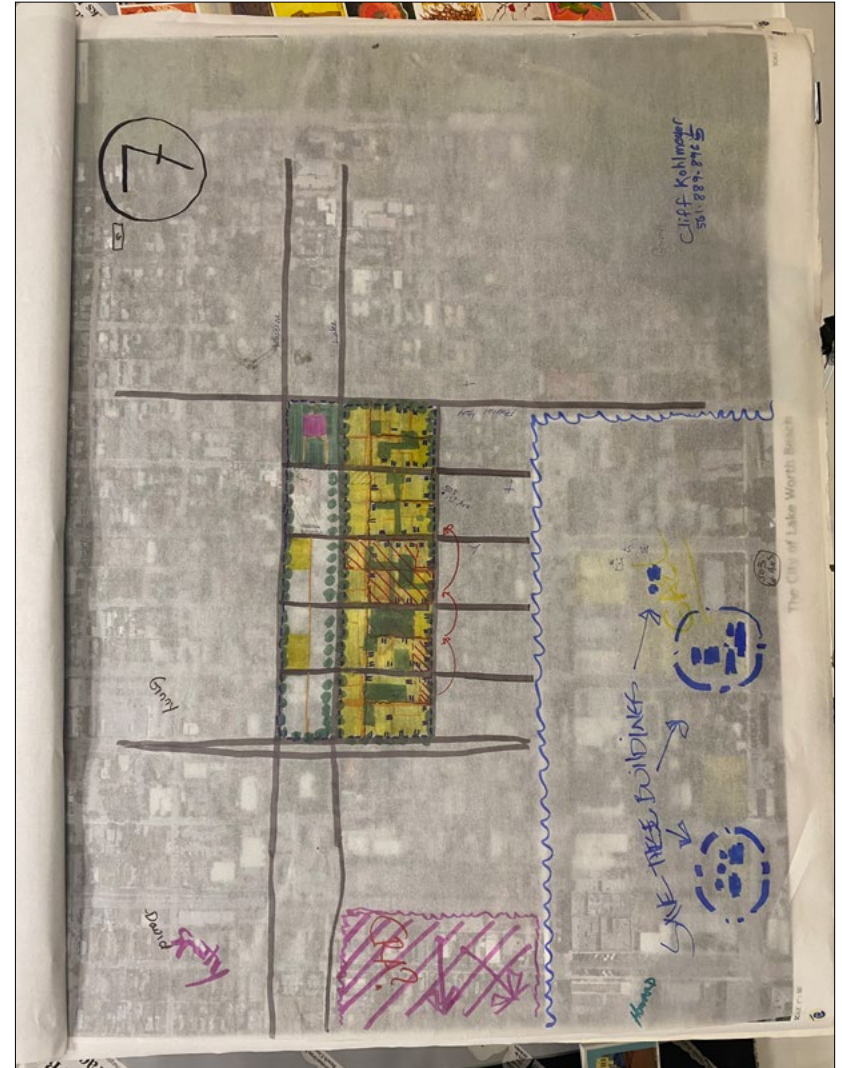


Figure 48 Citizens presenting their workshop ideas

TABLE 1



TABLE 2

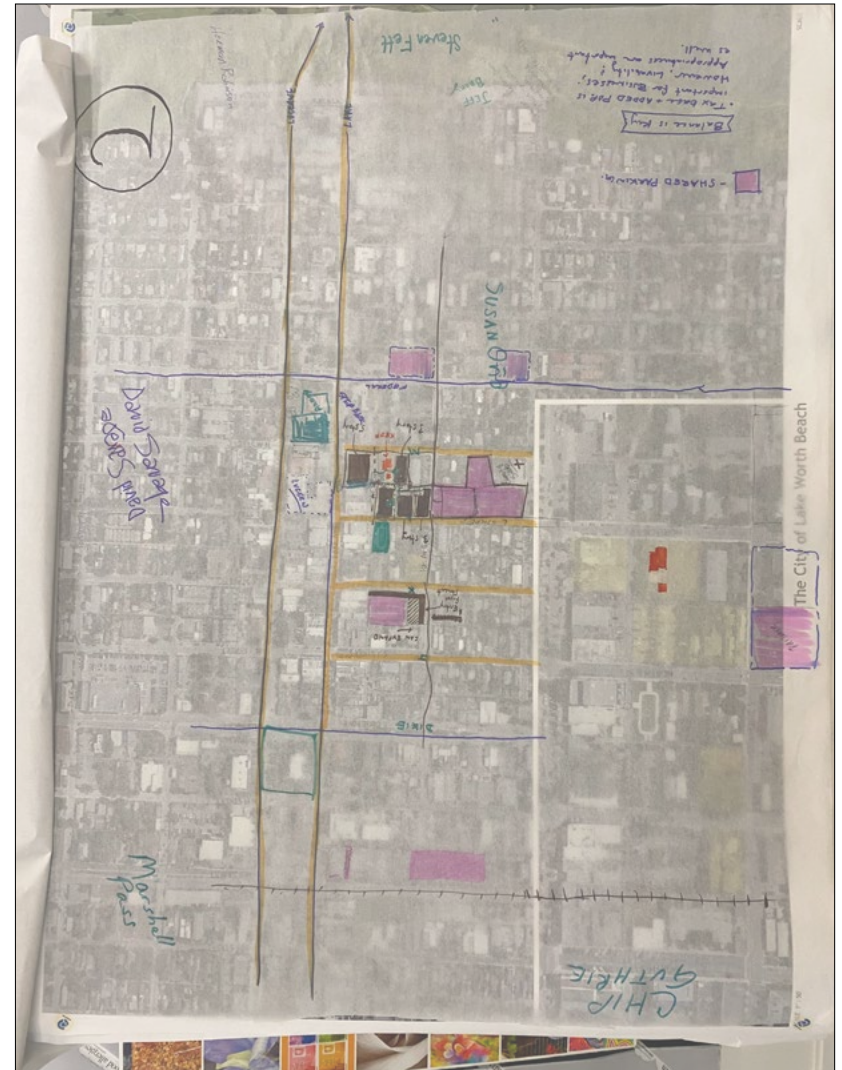


Figure 49 Citizen Charrette Plans

TABLE 3

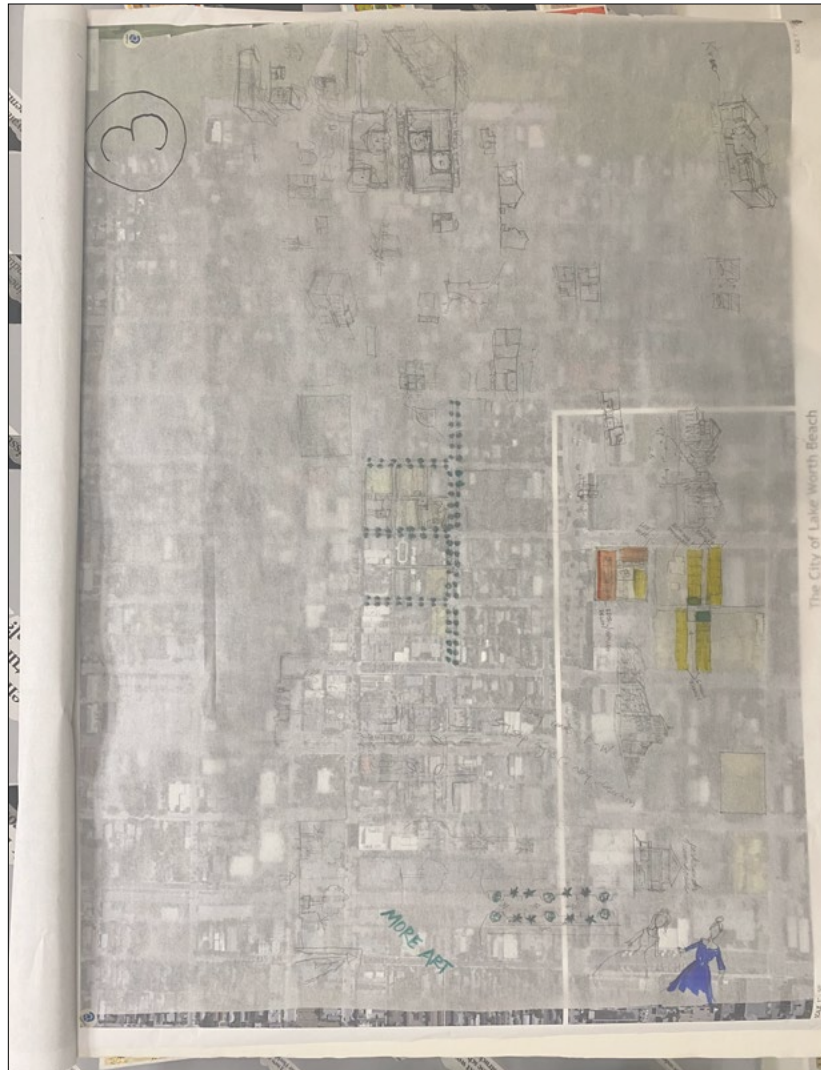


TABLE 4

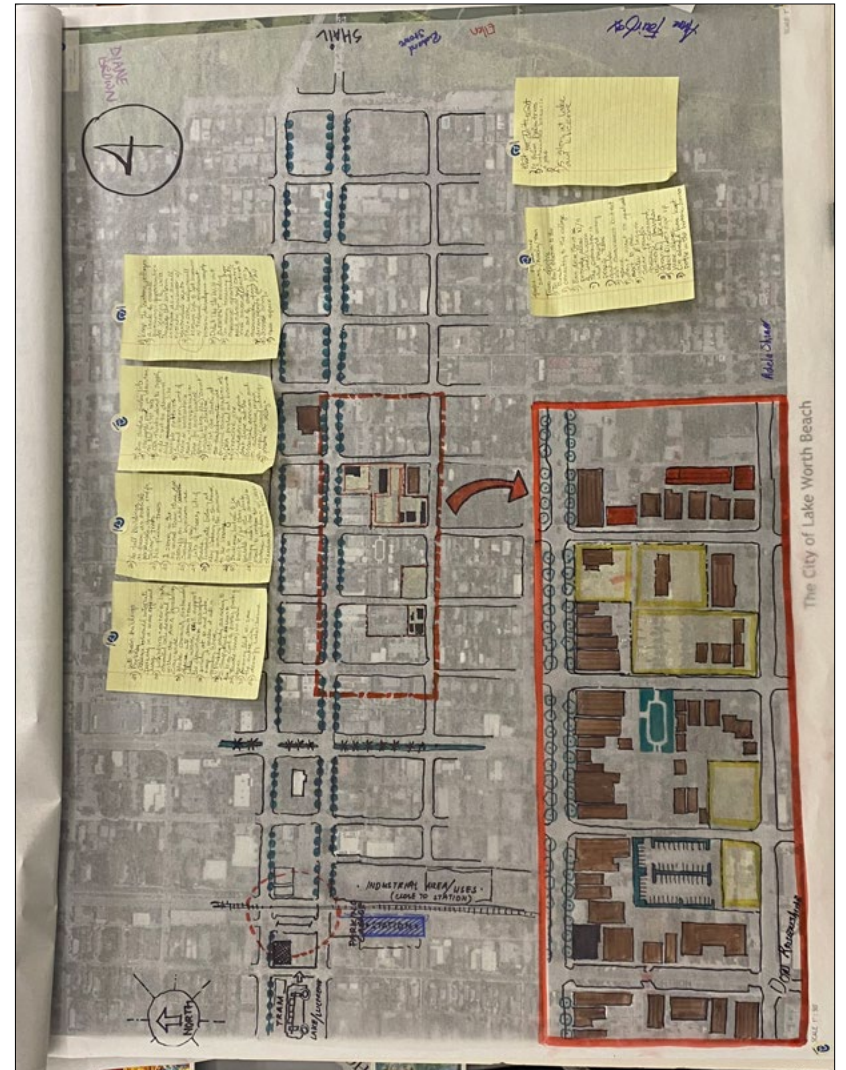


Figure 50 Citizen Charrette Plans

TABLE 5



TABLE 6

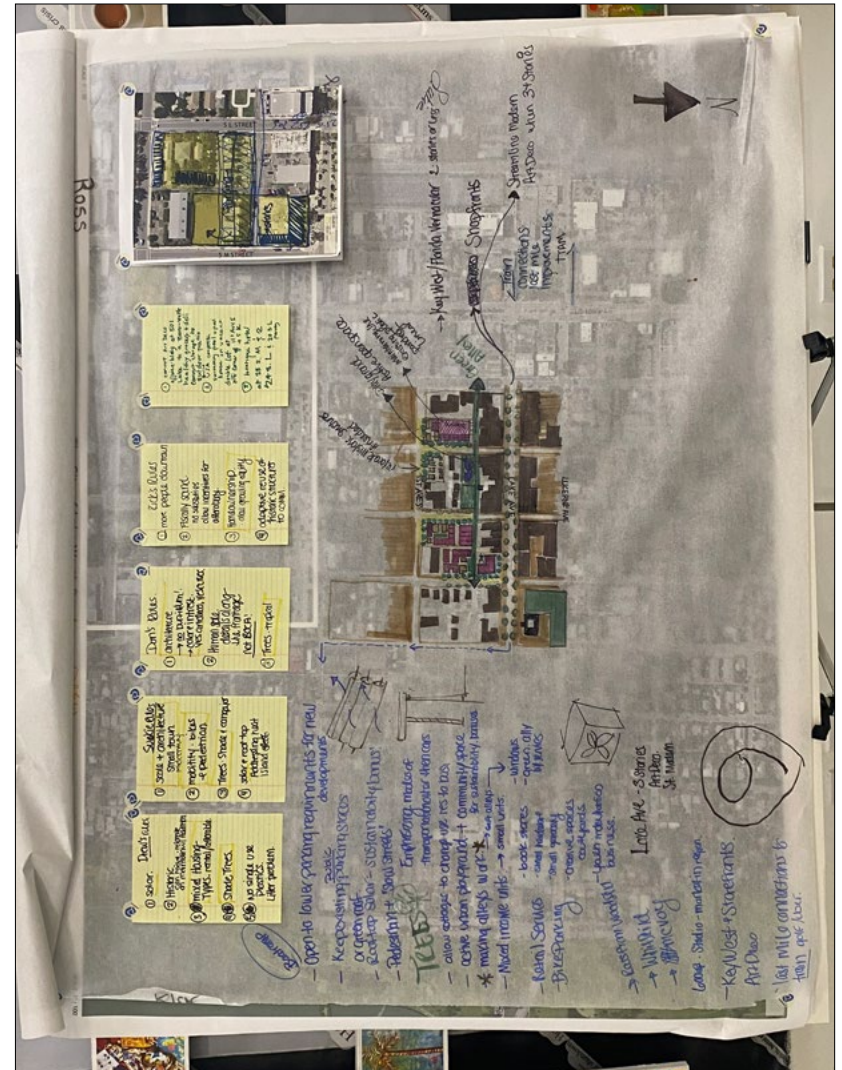


Figure 51 Citizen Charrette Plans

# LAKE WORTH BEACH CHARRETTE



## PUBLIC WORKSHOP SATURDAY APRIL 30<sup>TH</sup>

Join the City, the CRA and the Treasure Coast Regional Planning Council in a public discussion on the future of publicly owned properties in Downtown Lake Worth Beach. Lunch & refreshments will be provided.

- **OPENING PRESENTATION: 10:00 AM**
- **PUBLIC DESIGN SESSION: 11:00 AM - 1:00 PM  
LUNCH PROVIDED**
- **CITIZENS PRESENTATIONS: 1:00 PM - 2:30 PM**
- **WRAP UP: 3:00 PM**

**LOCATION** HATCH 1121 Event Space  
1121 Lucerne Avenue  
Lake Worth Beach, Florida 33460  
P: 561.493.2550



For more information, please visit:  
<https://lakeworthbeachfl.gov/>

# PLEASE PROVIDE YOUR INPUT

The Treasure Coast Regional Planning Council, in collaboration with the City of Lake Worth Beach and the Lake Worth Beach Community Redevelopment Agency (CRA) will conduct a public workshop and design charrette to develop alternate solutions for the City/CRA owned parcels along S K Street to 1st Avenue S and between South L and M streets along 1st Avenue S in downtown Lake Worth Beach (see images to the right). The ultimate result of this effort is to create designs, data, and analyses to inform a future Request for Proposals (RFP) for the redevelopment of these sites.



*This is Site 1 from the original 2020 RFP – parcels located between L and M Streets at 1st Avenue S*

- **Saturday Public Workshop**  
Saturday, April 30, 2022: 10:00 am – 3:00 pm
- **Charrette Studio Day #1**  
Sunday, May 1, 2022 9:00 am – 10:00 pm
- **Charrette Studio Day #2**  
Monday, May 2, 2022 9:00 am – 10:00 pm
- **Charrette Studio Day #3**  
Tuesday, May 3, 2022 9:00 am – 10:00 pm
- **Charrette Studio Day #4**  
Wednesday, May 4, 2022 9:00 am – 6:00 pm
- **Work-In-Progress Presentation**  
Wednesday, May 18, 2022 6:00 pm – 8:00 pm  
*Location: City of Lake Worth Beach, City Commission Chambers, City Hall*



*This is Site 2 from the original 2020 RFP – parcels located along K Street at 1st Avenue S*

The Saturday Public Workshop and Charrette Design Studio (open to the public) will occur at HATCH 1121 Event Space

For more information please contact  
William Waters, AIA, NCARB, LEED AP BD+C, ID, SEED  
Community Sustainability Director, City of Lake Worth Beach, 561.586.1634  
[wwaters@lakeworthbeachfl.gov](mailto:wwaters@lakeworthbeachfl.gov)  
or  
Dana P. Little  
Urban Design Director, Treasure Coast Regional Planning Council 772.221.4060, [dlittle@tcrpc.org](mailto:dlittle@tcrpc.org)



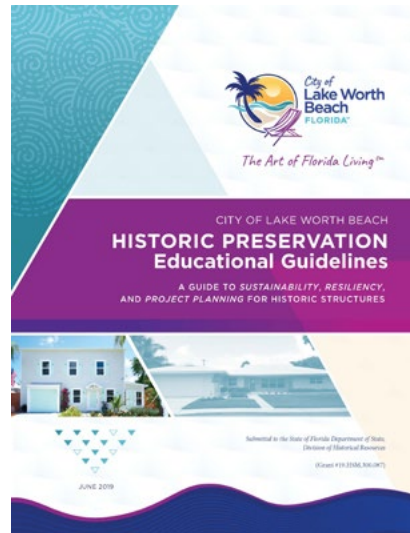
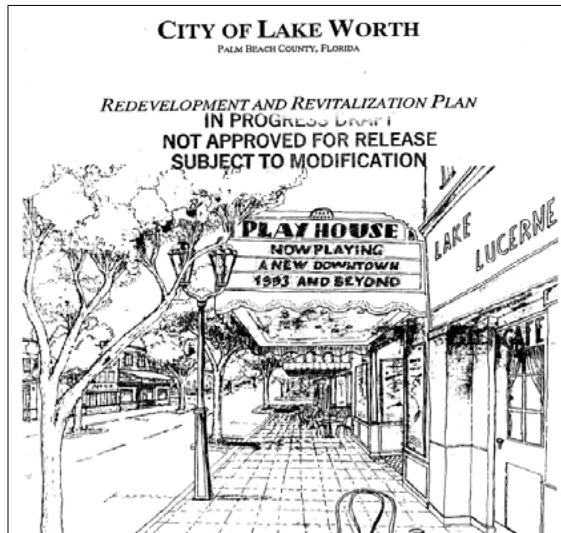
# APPENDIX B

## BACKGROUND & EXISTING CONDITIONS



## BACKGROUND

This Master Plan report reflects the efforts and collaboration of the City of Lake Worth Beach (City), the Lake Worth Beach Community Redevelopment Agency (CRA), the Treasure Coast Regional Planning Council (TCRPC), and the residents and business owners of Lake Worth Beach. This multi-agency public planning process began in the fall of 2021 when TCRPC was requested to assist in developing a vision for multiple publicly owned parcels in downtown Lake Worth Beach. The subject of a previous Request for Proposals that was ultimately withdrawn due to public opposition, these publicly owned properties are in the Old Town Historic District and their future has generated great public interest.





PREVIOUS PLANS

Lake Worth Beach has a long tradition of community-based master plans. The original downtown plan (previous page) was developed by TCRPC in 1992 and initiated many of the positive changes still visible today. Between 2015-2017 the Cultural Arts Council developed an Arts and Culture Master Plan (see right). This plan prioritized mixed-use and residential density increases downtown. The Fairfax & Sammons plan (below) was a counter proposal to the “Element” RFP submittal (far right).

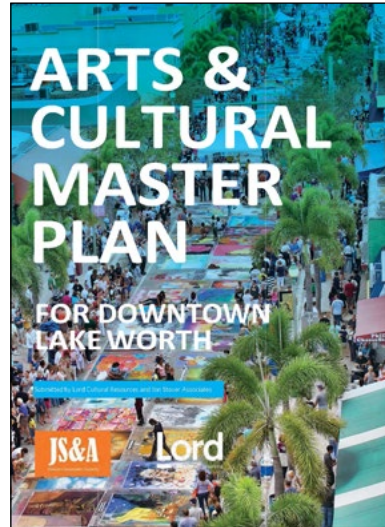


Figure 55 Arts and Cultural Master Plan



Figure 54 Element Proposal 2021





Figure 53 Fairfax and Sammons Concept (Site 1)



Figure 52 WGI concept for 1st Ave South between L St. and M St. 2019

ACQUISITION FUNDING SOURCE



City of Lake Worth Beach:   
CRA: 



## TIMELINE OF PURCHASE ACQUISITION ACTIVITIES

The following is a detailed timeline of City and CRA property acquisitions within the study area. This timeline is provided in its original format on the Lake Worth Beach CRA website.

### PROPERTIES ALONG SOUTH 'K' STREET; SOUTH 'L' STREET & SOUTH 'M' STREET

#### I. DOWNTOWN LAKE WORTH ARTS & CULTURE MASTER PLAN

- **2015-2017:** Under the guidance of local residents and business owners, the City of Lake Worth Beach, CRA and Cultural Council of Palm Beach County produce and approve the Downtown Lake Worth Arts & Culture Master Plan. The Plan recommends development between 1st Avenue South and 1st Avenue North, adding height and density to allow for mixed use, live-work developments that support artist's needs. For this, assemblages of land need to be encouraged by incentivizing through making the process easier and faster. This could also mean helping to assemble by acquiring key pieces of property. Public parking improvements are also a recommendation of the Plan. [CLICK HERE](#) for a copy of the Plan.

#### II. PARKING STUDY

- **October 2017:** City of Lake Worth Beach Commission approves a contract with WGI to provide a comprehensive downtown parking program and parking structure feasibility study. ([EXHIBIT A](#))
- **October 2018:** City of Lake Worth Beach produced the completed parking study by WGI. ([EXHIBIT B](#))
- This study included drawings for a possible municipal parking garage on the sites along 'L' & 'M' Streets. [CLICK HERE](#) for additional information regarding downtown parking.

#### III. INTERLOCAL AGREEMENTS BETWEEN THE CRA AND THE CITY OF LAKE WORTH BEACH ([EXHIBIT C](#))

- **June 19, 2018:** City of Lake Worth Beach Authorizes \$1,050,000 to acquire 26 South 'L' St.; 30 South 'L' St. and 32 South 'L' St. and \$180,000 for resurfacing for public parking. ([EXHIBIT C - June 19, 2018](#))

## TIMELINE OF PURCHASE ACQUISITION ACTIVITIES

- **October 16, 2018:** City of Lake Worth Beach Authorizes \$627,482.50 to acquire 17 South ‘M’ St. (EXHIBIT C - October 16, 2018)
- **February 5, 2019:** City of Lake Worth Beach Authorizes \$547,240.00 to acquire 25 South ‘K’ St. and 704 1 st Ave. South. (EXHIBIT C - February 5, 2019)
- (The City’s original focus of providing a public parking garage at ‘L’ & ‘M’ Streets switches to using the existing City owned surface lot along South ‘K’ Street and includes the homes purchased at the corner of 1 st Ave. South and South ‘K’ Street in March 2020.)
- **November 5, 2019:** City of Lake Worth Beach Commission approves the Sale and Transfer of 501 Lake Avenue to the CRA. (EXHIBIT D - November 5, 2019)

## IV. TIMELINE FOR HISTORIC RESOURCE PRESERVATION BOARD (HRPB) ACTIONS

- **January 2019:** First public hearing before the HRPB postponed at the City’s request.
- **June 2019:** City of Lake Worth Beach authorizes private consultant to conduct a massing study of the site.
- **September 18, 2019:** HRPB public meeting to consider the CRA’s application for the relocation or demolition of seven (7) contributing and three (3) non-contributing structures located within the ‘L’ & ‘M’ Street properties. (EXHIBIT E)

*The HRPB Order required the CRA to publicly advertise the structures for relocation and take all steps to have the structures relocated to another site. Any demolition permit for any of the contributing structures that are not relocated must first receive a Certificate of Appropriateness at the time of the issuance of the building permit for new construction.*

- **January 7, 2020:** City of Lake Worth Beach Commission denies the administrative appeals filed by Clifford Kohlmeyer and Thomas Conboy filed with respect to the HRPB’s order granting the CRA the right to relocate or demolish structures, subject to conditions. Mr. Christopher McVoy also submitted a letter to appeal the decision but was found, by the City, to not have legal standing. (EXHIBIT F)
- **February 12, 2020:** Thomas Conboy files a Petition for Writ of Certiorari with Palm Beach County Circuit Court. (EXHIBIT G)

## TIMELINE OF PURCHASE ACQUISITION ACTIVITIES

- **June 8, 2020:** The Court grants the CRA’s Motion to Intervene and directs the CRA and City of Lake Worth Beach to file a joint response to the Petition for Writ of Certiorari. (EXHIBIT H)
- **February 17, 2021:** Opinion issued by the Court denying the Petition for Writ of Certiorari. (EXHIBIT I)

## V. LAKE WORTH BEACH CRA’S DEVELOPMENT PROCESS

- **October 2019:** Lake Worth Beach CRA issues the Request for Proposals for the moving of the historic, contributing houses. No proposals were received by February 2020. (EXHIBIT J)
- **March 2020:** Lake Worth Beach CRA issues the Request for Proposals for the development of the ‘L’ & ‘M’ Street and ‘K’ Street/ 1 st Ave. South sites in downtown. Due to the pandemic, the submission deadline was extended from early June to August 4, 2020. (EXHIBIT K). This RFP was advertised on the CRA website, on social media sites, in both the Palm Beach Post and Sun Sentinel, on loopnet.com, on The RealDeal website (real estate website for south Florida), on the Florida Redevelopment Association website (redevelopment.net), on the American Planning Association website (planning.org) and through the Urban Land Institute (ULI).
- **September 18, 2020:** CRA and City Review Committee meet to review and score proposals.
- **October 13, 2020:** CRA Board of Commissioners vote on the Review Committee recommendations (EXHIBIT L)
- **March 2021:** Economic Development Impact Analysis CLICK HERE for a copy of the Plan
- **April 22, 2022:** Florida International University architectural student presentations CLICK HERE to view

## REQUEST FOR PROPOSALS

DEVELOPMENT OF SITES  
IN DOWNTOWN LAKE WORTH BEACH  
RFP #02-1920



RELEASE DATE:  
MARCH 2, 2020

SUBMISSION DEADLINE:  
3:00PM//JUNE 2, 2020

THE LAKE WORTH BEACH COMMUNITY REDEVELOPMENT AGENCY  
1121 LUCERNE AVE.  
LAKE WORTH BEACH, FL 33460  
[WWW.LAKEWORTHCRA.ORG](http://WWW.LAKEWORTHCRA.ORG)



## TIMELINE OF PURCHASE ACQUISITION ACTIVITIES

Once the RFP proposals were received and ranked by the selection committee, the “Element” development proposal was selected as the preferred submittal. Public opposition to the process, the size and scale of the proposal, and a desire to start again led to the developer withdrawing from the process. The newly elected Mayor and City Commission decided to embark on a public planning process and entered into an agreement with Treasure Coast Regional Planning Council to conduct the charrette and develop these recommendations.



# EXECUTIVE BRIEF SPECIAL MEETING

**AGENDA DATE:** October 6, 2022

**DEPARTMENT:** City Manager's Office

**TITLE:**

Update Status Discussion of CRA Owned Contributing Properties along South L and South K Streets

**SUMMARY:**

Discussion of the condemnation status of five (5) Community Redevelopment Agency (CRA) owned contributing properties along South L and South K Streets

**BACKGROUND AND JUSTIFICATION:**

On May 11, 2022, Staff provided a current status update regarding the seven (7) CRA owned contributing structures within the Old Town Historic District that were purchased beginning in 2018 in an effort to encourage redevelopment in the downtown. Current condition summaries and estimates for renovation for all of them were provided as well as an overview of next steps. Due to the cost of renovation and existing conditions, five (5) of the structures have been deemed financially unfeasible to restore. Two (2) were deemed appropriate for renovation. The Commission accepted the reports and recommendations.

CRA and City Staff in collaboration with the City's Building Official are providing the official condemnation reports for the five (5) structures that were deemed beyond repair. The reports are included as attachments. The structures involved are located at 30 South L Street, 32 South L Street, 25 South K Street, 704 1<sup>st</sup> Avenue South and 710 1<sup>st</sup> Avenue South. The CRA also has obtained demolition proposals from several contractors outlining the costs to demolish and clear the five (5) properties in question. The City has yet to obtain cost estimates for termite tenting for the two (2) structures to remain located at 24 South L Street and 26 South L Street.

**MOTION:**

Provide direction as appropriate

**ATTACHMENT(S):**

Condemnation Reports for Five (5) Properties  
Demolition Estimates Spreadsheet  
May 11, 2022 Staff Report  
Original Summary Memo dated May 9, 2022  
Seven (7) Condition Reports



Declaration of unsafe conditions.

July 11, 2022

In my capacity as Building Official, I have inspected the building located at 25 South K Street several times over the past year. I have determined that the building is unsafe according to the City's definition of "unsafe building" in Section 9-2.2, Code of Ordinances, City of Lake Worth Beach, Florida, Abatement of unsafe buildings. The building is hereby declared unsafe for the following reasons:

The building as a result of decay, deterioration or dilapidation, is likely to fully or partially collapse. (Sec. 9-2.2(c)(7))

The wood frame building has significant termite damage visible. The foundation of the building is questionable. The piers on which the house is set show signs of settling and elements of the building are leaning. There is photographic evidence of the site visits in the file.

The building is vacant. It is my recommendation that the building be demolished at this time. Please sign and return this Declaration to me to authorize the demolition of the building.

If you have any questions, please let me know.

Sincerely,

A handwritten signature in red ink that reads "Peter Ringle".

Peter Ringle, CBO, CFM  
Building Official  
Community Sustainability Department





BUILDING DIVISION  
1900 2<sup>ND</sup> AVENUE NORTH  
LAKE WORTH BEACH, FL 33460

Declaration of unsafe conditions.

July 11, 2022

In my capacity as Building Official, I have inspected the building located at 30 South L Street several times over the past year. I have determined that the building is unsafe according to the City's definition of "unsafe building" in Section 9-2.2, Code of Ordinances, City of Lake Worth Beach, Florida, Abatement of unsafe buildings. The building is hereby declared unsafe for the following reasons:

The building as a result of decay, deterioration or dilapidation, is likely to fully or partially collapse. (Sec. 9-2.2(c)(7))

The wood frame building has significant termite damage visible. The rim board as well as the floor joists have been structurally compromised by the termites. There is photographic evidence of the site visits in the file.

The building is vacant. It is my recommendation that the building be demolished at this time. Please sign and return this Declaration to me to authorize the demolition of the building.

If you have any questions, please let me know.

Sincerely,

A handwritten signature in red ink that reads "Peter Ringle".

Peter Ringle, CBO, CFM  
Building Official  
Community Sustainability Department



BUILDING DIVISION  
1900 2<sup>ND</sup> AVENUE NORTH  
LAKE WORTH BEACH, FL 33460

Declaration of unsafe conditions.

July 11, 2022

In my capacity as Building Official, I have inspected the building located at 32 South L Street several times over the past year. I have determined that the building is unsafe according to the City's definition of "unsafe building" in Section 9-2.2, Code of Ordinances, City of Lake Worth Beach, Florida, Abatement of unsafe buildings. The building is hereby declared unsafe for the following reasons:

The building as a result of decay, deterioration or dilapidation, is likely to fully or partially collapse. (Sec. 9-2.2(c)(7))

The building is both wood frame and concrete block. There was no access to the interior of the building during my inspections. This declaration is based on the visible evidence observed on the exterior. The wood frame portion of the building shows significant evidence of water damage. The exterior wall on the north side of the building shows signs of structural distress. There is photographic evidence of the site visits in the file.

The building is vacant. It is my recommendation that the building be demolished at this time. Please sign and return this Declaration to me to authorize the demolition of the building.

If you have any questions, please let me know.

Sincerely,

*Peter Ringle*

Peter Ringle, CBO, CFM  
Building Official  
Community Sustainability Department



BUILDING DIVISION  
1900 2<sup>ND</sup> AVENUE NORTH  
LAKE WORTH BEACH, FL 33460

Declaration of unsafe conditions.

July 11, 2022

In my capacity as Building Official, I have inspected the building located at 704 1<sup>st</sup> Ave S several times over the past year. I have determined that the building is unsafe according to the City's definition of "unsafe building" in Section 9-2.2, Code of Ordinances, City of Lake Worth Beach, Florida, Abatement of unsafe buildings. The building is hereby declared unsafe for the following reasons:

The building as a result of decay, deterioration or dilapidation, is likely to fully or partially collapse. (Sec. 9-2.2(c)(7))

The building is composed of a mixture of wood frame and concrete block construction. The wood frame portion of the building shows evidence of termite damage. The floor joists also show evidence of deflection. The roof of the concrete block portion is leaking and there may be issues with rotten roof joists and termite damage of the roof.

The building is vacant. It is my recommendation that the building be demolished at this time. Please sign and return this Declaration to me to authorize the demolition of the building.

If you have any questions, please let me know.

Sincerely,

*Peter Ringle*

Peter Ringle, CBO, CFM  
Building Official  
Community Sustainability Department



Declaration of unsafe conditions.

July 11, 2022

In my capacity as Building Official, I have inspected the building located at 710 1<sup>st</sup> Ave S several times over the past year. I have determined that the building is unsafe according to the City's definition of "unsafe building" in Section 9-2.2, Code of Ordinances, City of Lake Worth Beach, Florida, Abatement of unsafe buildings. The building is hereby declared unsafe for the following reasons:

The building as a result of decay, deterioration or dilapidation, is likely to fully or partially collapse. (Sec. 9-2.2(c)(7))

The wood frame building has significant termite damage visible. The foundation of the building is questionable. The piers on which the building is set show signs of settling and elements of the building are leaning. There is photographic evidence of the site visits in the file.

The building is vacant. It is my recommendation that the building be demolished at this time. Please sign and return this Declaration to me to authorize the demolition of the building.

If you have any questions, please let me know.

Sincerely,

A handwritten signature in red ink that reads "Peter Ringle".

Peter Ringle, CBO, CFM  
Building Official  
Community Sustainability Department

Authorizing Demolition

---

Carmen Davis, City Manager

# EXECUTIVE BRIEF SPECIAL MEETING

**AGENDA DATE:** May 18, 2022

**DEPARTMENT:** City Manager's Office

**TITLE:**

Status Discussion of Contributing Properties along South L and South K Streets

**SUMMARY:**

Discussion of the current condition and estimates of probable costs for renovations of the contributing properties along South L and South K Streets

**BACKGROUND AND JUSTIFICATION:**

There are seven (7) contributing structures with the Old Town Historic District that were purchased by the Community Redevelopment Agency (CRA) approximately four (4) years ago in furtherance of encouraging redevelopment in the downtown. Over the intervening years, the structures have stood vacant, empty and deteriorating. At the direction of the City Commission, Staff obtained estimates of probable cost to restore each of the seven (7) structures so that they might be leased and inhabited for residential purposes.

Provided here is a summary of the findings as well as the full reports prepared by Jeff Berkoff of Bella Construction, a local Lake Worth Beach contractor.

**MOTION:**

Provide direction as appropriate

**ATTACHMENT(S):**

Summary Memo  
Seven (7) Reports





















Memorandum

To: Carmen Davis, City Manager  
From: William Waters, DCS Director  
Subject: Visual Assessment of Historic Buildings on South K and South L Streets  
Date: May 9, 2022

Per the direction provided by the City Commission, staff obtained renovation costs for the contributing properties along South L and South K Streets. The estimates of probable costs in order for them to be inhabited and leased for residential purposes were provided by Jeff Berkoff of Bella Construction, a Lake Worth Beach construction firm. Each estimate is itemized including all activities for each structure

Provided as attachments are the seven (7) individual reports for each of the structures. In summary, the reports provide the following:

Address		Estimate of Cost for Renovations
24 South L Street	-	\$159,800
26 South L Street	-	\$367,900
30 South L Street	-	\$338,900
32 South L Street	-	\$348,300
25 South K Street	-	\$266,800
704 1 <sup>st</sup> Avenue South	-	\$317,800
710 1 <sup>st</sup> Avenue South	-	Recommendation for Demolition due to Cost

Attachments

- 24 South L Street
- 26 South L Street
- 30 South L Street
- 32 South L Street
- 25 South K Street
- 704 1<sup>st</sup> Avenue South
- 710 1<sup>st</sup> Avenue South

# REQUEST FOR PROPOSALS

REDEVELOPMENT OF PUBLICLY OWNED LOTS IN DOWNTOWN LAKE WORTH BEACH

RFP #02-2023

**DRAFT**



**RELEASE DATE:**

**SUBMISSION DEADLINE:**

LAKE WORTH BEACH COMMUNITY REDEVELOPMENT AGENCY (CRA)

1121 LUCERNE AVE.

LAKE WORTH BEACH, FL 33460

[WWW.LAKEWORTHCRA.ORG](http://WWW.LAKEWORTHCRA.ORG)

## OVERVIEW OF THE CITY

The City of Lake Worth Beach is located on the southeast coast of Florida, in central Palm Beach County. Although development in Lake Worth Beach has been intermittent for the last 50 years, development pressure from both the north and south have made the City a focal point for new investment. The City is determined to attract new residents, businesses and activities while still remaining quaint, distinctive and authentic. The City boasts its own municipal golf course, parks along the Intracoastal waterway and a renown, world class beach complex. Lake Worth Beach is also known for its inclusive environment and its diverse ethnic make-up.

Lake Worth Beach has six designated historic districts and four properties which are listed on the prestigious National Register of Historic Places. Among these is the Old Town Historic District, located in the downtown. This area maintains an artsy mix of galleries, antiques shops, artisan wares, restaurants and sidewalk cafés. Downtown's main street is Lake Avenue, boasting some of the oldest and coolest commercial architecture, including the Montgomery Building, a three story 1940s Art Deco gem with innovative exhibition space—and a fitting home for the Cultural Council of Palm Beach County, the prominent arts advocacy organization—the grand Gulfstream Hotel, built in 1923 and currently awaiting restoration and expansion and the Lake Worth Playhouse. Originally built as a “movie palace,” this beautifully restored 1920s Art Deco theatre is today known for its community-theater productions, live concerts and indie films.

The available vacant sites discussed below are in the heart of the Downtown, in an area undergoing significant redevelopment. Values in this area have been steadily rising in recent years as more residents move to the urban area for its close proximity to everything Lake Worth Beach has to offer, including the arts district, unique downtown stores, live entertainment and the beach, which is just a little more than a mile away. Several redevelopment projects which are underway or in the planning stages include adding new residential, restaurant, retail and office options.

## PURPOSE

The purpose of this Request for Proposals (RFP) is to solicit qualifications from reputable developers who are interested and qualified to design and develop multiple parcels in downtown Lake Worth Beach. The available parcels are located in the City's Old Town Historic District. Therefore, interested firms must have experience working in historic districts and be familiar with preservation and neighborhood compatibility. Having at least one preservation expert on the team is strongly encouraged.

This will be a two-part solicitation in which the first round will focus on providing the necessary qualifications while the second round will focus on project specific proposals depicting the intended design and development of the parcels. **Only the top three finalists from the first round of qualified proposers will be chosen to prepare proposals for phase two of this solicitation with will involve the actual design, layout and preliminary site plan for the area.**

Proposals will be selected for the development of vacant and/or uninhabited, CRA-owned parcels/structures along Lake Avenue as well as South “L,” and “M” Streets, just south of Lake Avenue in both the downtown and mixed-use east zoning districts (maps and corresponding land use regulations are attached).

The site contains 11 CRA & City-owned properties located between South “L” Street and South “M” Street, north of 1<sup>st</sup> Avenue South. Of the 11 properties, 3 will have historic residential structures that must remain and be incorporated into the project while 7 are vacant and ready for development. The final parcel will contain a commercial structure which may require demolition or be incorporated in the final project.



The CRA is preferably seeking one proposal for all of the CRA owned sites although individual sites may be chosen by a proposer. It is the CRA's intention to competitively select a Developer with the proven ability and interest to construct a development and to own the property once constructed. Projects should range between two to five stories (average) in height (See TCRPC Master Plan for specifics). Each project should have a mix of uses, including parking, which may also include, market rate apartments, for-sale condominiums or hotel rooms, meet City historic and thoroughfare design guidelines, create foot-traffic and be architecturally significant. The three structures currently on site (24 South "L" St., 26 South "L" St. and 17 South "M" St.), must be incorporated into the new development proposed for the site.

## **BACKGROUND**

The Lake Worth Beach CRA has undertaken both housing and commercial property development over the last two decades. The goal of the CRA is to spur private investment and improve property values in the CRA District. In 2010 the CRA was awarded \$23M from the Department of Housing and Urban Development for the development of at least 100 new or rehabilitated affordable housing units. The CRA and its partners, far exceeded this goal and, to date, created over 400 residential units. Other projects associated with the purchase of formerly blighted properties also has led to the development of over 20,000 square feet of commercial space. With the development of commercial space, local jobs were created, meeting a NSP-2 National Objective. The CRA is seeking to continue the development of housing choices, while also creating additional local job opportunities.

With that in mind, the CRA secured a line of credit and purchased properties in key areas of the City. For this particular assemblage, the CRA partnered with the City of Lake Worth Beach to facilitate the development of a mixed-use project to attract residents to the downtown area and stimulate additional commercial activity in the core. While Lake and Lucerne Avenues continue as retail and entertainment corridors, additional market rate units in close proximity will help create a compact, walkable and sustainable downtown.

Due to the configuration of the purchased lots, the proposed development has access to 125 feet of frontage on Lake Avenue, the City's premiere retail corridor with access to both I-95 and the beach. Although a development would need to be architecturally sensitive to the historic built environment, the Lake Ave. frontage provides prime commercial space as well as a connection to the remainder of the project. The CRA is seeking a variety of quality housing units, a consolidation of uses including residential, commercial/office and parking, and an expansion of the urban center to create healthier and more lively main streets.

In January of 2022, the City and CRA hired the Treasure Coast Regional Planning Council (TCRPC) to conduct a public planning process and to develop an overall plan for these properties. The result is a Master Plan report that illustrates accepted design concepts, financial analyses and redevelopment recommendations for the "L" and "M" site. The Master Plan document serves as a guide to assist builders with a development plan that is consistent with the historic scale and character of the area while remaining flexible enough to provide for dense, yet smaller urban-scale structures.

## **THIS PROPOSAL**

### **PHASE I - Qualifications**

Part one of this solicitation focuses on the qualifications of the proposer. We are seeking qualified, professional architecture and development teams with a focus on not only preserving historic structures but one that also includes substantial redevelopment in a downtown setting that has a unique and distinctive flavor. To be

considered a qualified proposer, the firm or firms must also show the financial capacity to complete a project this size and with the intended vision as indicated in the Downtown Parcels Master Plan created by the Treasure Coast Regional Planning Council and the public.

The selected developer will, at a minimum:

- Be an experienced, stable and financed development firm who have completed similar projects. Examples of similar projects are required as well as proof of available capital.
- Prioritize historic preservation by saving and revitalizing historic structures that give the neighborhood a distinctive character. Examples of projects that preserve contributing structures is required.
- Proposers should have a qualified planner or architect on Staff or a consultant who has experience with redeveloping areas containing contributing historic structures.
- The proposal will outline the Proposer's goals for this project. The outline of the goals should give an overview of the development envisioned. The proposer must describe the general, envisioned architectural style and any highlights of the design that deserve extra attention.
- The proposal will identify primary management team involved with the project and any consultants on the design or development team.
- The proposal should contain examples of previous projects in South Florida that included workforce housing options, affordable housing options and attainable housing options.
- Proposal should include examples of previous projects that utilized complex public financing and incentive programs necessary to complete that project.
- The proposal shall include a purchase price the developer is ready and willing to pay for the 11 CRA-owned lots. A minimum offer of \$2M is required. Any offers above the minimum required will earn the proposer extra points.
- Only the top three proposals that are chosen by the Selection Team for further consideration will be invited to submit complete proposals that incorporate all the necessary portions and qualifications listed in PHASE II of this solicitation (unless determined otherwise by City and CRA Staff).

## **PHASE II - Full Proposal**

- This phase of the proposal will include site plans showing a general layout of the development, specifically identifying the location and physical situation of:
  - The land required for the project, including property boundaries and a definitive plan as to whether the Proposer envisions purchasing and developing all the land available.
  - Existing buildings and new buildings that may be erected, including the approximate square footage for each, as well as, architectural elevations for each.
  - Parking areas and parking area access ways.
  - Any additional features such as outdoor facilities, areas of significant landscaping, outbuildings, areas for future development, public parking opportunities, etc.

- The project should produce enough parking to meet the demands of the development. The location of the parking, using the sites available, its structure and design may be interpreted by the developer.
- Be able to develop aesthetically-pleasing, well-designed units incorporating innovative features and amenities such as green, sustainable building techniques while meeting the City's mixed-use zoning regulations, thoroughfare design guidelines and historic preservation design guidelines. Must work with CRA/ City Staff to identify and incorporate the design objectives for the area, as expressed in the City's Comprehensive Plan, and Treasure Coast Regional Planning Council's Lake Worth Beach Downtown Parcels Master Plan.
- The development program must include, a minimum of seventy residential units, a minimum of 5,000 square feet of commercial space and a \$2M payment for the land.
- Indicate an ability to begin the project within 180 days of the contract award with financing and management teams secured and to have the project complete within three (3) years.
- Only development proposals that will generate ad-valorem taxes will be accepted.
- The redevelopment should support, enhance and elevate the City's image and brand on a regional and national basis.
- The proposal should include, when allowable, one, two and some three-bedroom residential units.
- Projects should incorporate public art or amenities.
- A proposer may submit a proposal for only one of the parcels or a combination of the properties, if desired. A proposer that includes all the project area is preferred.

The Project Area includes lots that are zoned mixed-use east (MU-E) or downtown (DT) and have a future land use designation of downtown, mixed-use (DMU). Surveys are available for all the available lots upon request.

The addresses and parcel control numbers include:

**PARCEL INFORMATION**

PCN #	Address	Size/acres	Zoning	Land Use	Sales Price	Closing Costs	Total Cost
38-43-44-21-15-023-0090	16 S L ST	0.16	MU-E	DMU	\$300,000	\$18,715	\$318,715
38-43-44-21-15-023-0220	13 S M ST	0.08	MU-E	DMU	\$272,000	-	\$272,000
38-43-44-21-15-023-0060	20 S L ST	0.23	MU-E	DMU	\$375,000	-	\$375,000
38-43-44-21-15-023-0230	17 S M ST	0.16	MU-E	DMU	\$620,000	\$7,133	\$627,133
38-43-44-21-15-023-0250	23 S M ST	0.23	MU-E	DMU	\$575,000	\$35,658	\$610,658
38-43-44-21-15-023-0050	24 S L ST	0.08	MU-E	DMU	\$200,000	-	\$200,000
38-43-44-21-15-023-0030	26 S L ST	0.16	MU-E	DMU	\$1,050,000	\$43,395	\$1,093,395
38-43-44-21-15-023-0020	30 S L ST	0.08	MU-E	DMU	" "	" "	" "
38-43-44-21-15-023-0010	32 S L ST	0.08	MU-E	DMU	" "	" "	" "
Alley (north/south)		0.06	-	-	-	-	-
38-43-44-21-15-023-0191	501 LAKE AVE.	0.17	DT	DMU	\$250,000	-	\$250,000
38-43-44-21-15-023-0170	509 LAKE AVE.	0.19	DT	DMU	\$855,000	\$49,019	\$904,019
Alley (east / west)		0.10					
<b>TOTALS:</b>		<b>1.78 acres (approximate)</b>			<b>\$4,497,000</b>	<b>\$153,920</b>	<b>\$4,650,920</b>

**A ONE-TIME WALK-THROUGH OF THE PROPERTIES WILL BE CONDUCTED FOR INTERESTED PROPOSERS ON XX FROM XX TO XX.**

**APPLICABLE CODES AND DESIGN GUIDELINES (WHICH, IF ANY, WILL NOT APPLY)**

City Land Development Regulations:

[https://library.municode.com/fl/lake\\_worth\\_beach/codes/code\\_of\\_ordinances?nodeId=PTIICOOR\\_CH23LADERE](https://library.municode.com/fl/lake_worth_beach/codes/code_of_ordinances?nodeId=PTIICOOR_CH23LADERE)

Historic Preservation Design Guidelines: <https://lwbdata.sfo3.cdn.digitaloceanspaces.com/community-sustainability/historic/72021/Lake%20Worth%20Beach%20Historic%20Preservation%20Design%20Guidelines.pdf>

f

City Comprehensive Plan: <https://lakeworthbeachfl.gov/comprehensive-plan/>

City Major Thoroughfare Design Guidelines: <https://lwbddata.sfo3.cdn.digitaloceanspaces.com/community-sustainability/planning/Major-Thoroughfare-Design-Guidelines-WEB.pdf>

City Downtown Parcels Master Plan: <https://lakeworthbeachfl.gov/wp-content/uploads/2023/01/Downtown-Master-Plan.pdf>

Site and Building Design Qualitative and Performance Standards:

[https://lwbddata.sfo3.cdn.digitaloceanspaces.com/community-sustainability/economic-development/CLWB\\_Site%20and%20Building%20Design%20Qualitative%20performance%20standards%20web%20brochure.pdf](https://lwbddata.sfo3.cdn.digitaloceanspaces.com/community-sustainability/economic-development/CLWB_Site%20and%20Building%20Design%20Qualitative%20performance%20standards%20web%20brochure.pdf)

## **RELEVANT EXPERIENCE & PAST PERFORMANCE**

Proposers are required to identify related work performed that has been successfully completed to date, or is actively underway. Most notably, the work identified should closely resemble the type of development sought in this proposal. For each project, please list:

- Project name and address
- Photos of development (renderings if under construction)
- Contact person, title, phone number and email
- Detailed description of the type of project
- The duration of the project including start and completion (or anticipated) dates
- Value of each project

## **DEVELOPER'S FINANCIAL CAPACITY & CAPABILITY**

- Financial Statements – in order to demonstrate access to equity and debt capital and other financing resources to carry out the proposed project, the developer must provide in a separate submittal, one set of audited financial statements for the past two years for each principal and joint venture partner. Each entity must submit separate financial statements; and/or
- Sources and Availability of Capital – identify sources of debt/ equity capital, including relationship of lender/investor to the developer and contact information. Also provide a written statement from each financing source that the equity and or debt capital is available or will be made available for funding the proposed project. Written statements must shall detail the amount of capital, the size of the project and any other pertinent information to assist the CRA in determining the availability of equity and debt capital to the proposed project.
- Pipeline Projects – list and describe all projects currently in the pipeline, including status, development budget and schedule.

Please provide at least three (3) business related references for projects that are submitted as part of the proposers past performance who can be contacted for an independent evaluation of your work (EXHIBIT 'C'). All responses must be delivered or mailed to:

Lake Worth Beach Community Redevelopment Agency  
1121 Lucerne Avenue  
Lake Worth Beach, FL 33460  
Attn: Chris Dabros  
[cdabros@lakeworthbeachfl.gov](mailto:cdabros@lakeworthbeachfl.gov)

**ENVELOPE MUST BE IDENTIFIED AS RFP #02-2023 AND BE RECEIVED AT THE CRA OFFICE NO LATER THAN 3:00PM ON , 2023.**

The documents included or incorporated in this RFP constitute the complete set of instructions, scope of work, specification requirements and forms. It is the responsibility of the submitter to insure that all pages are included.

All must be typed or written in ink, and must be signed in ink by an officer having authority to represent the company. Signatures are required where indicated; failure to do so shall be cause for submittal rejection.

### **PROPOSAL PROCESS**

A Selection Committee, led by CRA Staff, will evaluate all proposals that meet the basic requirements. The Selection Committee will then rank all the qualified teams in a publicly held meeting. The teams that receive the highest scores will be chosen to present to the Selection Committee. The three highest ranked, qualified respondents, will be the asked to submit full proposals to the CRA.

Once a development team has been selected by the Board, the selected proposer and CRA Staff will negotiate the terms of a binding agreement for the sale and development of the property. Exact duration and financial terms of the sale are to be negotiated. The selected development team will be required to provide a non-refundable, good-faith deposit of \$10,000 before execution of a purchase and sale and a development agreement.

### **CHANGES & INTERPRETATIONS**

Changes to this RFP will be made by written addenda. A written addendum is the only official method whereby interpretation, clarification or additional information can be given. All addenda will be posted on the CRA's website: [www.lakeworthcra.org](http://www.lakeworthcra.org). It is the sole responsibility of each Proposer to check the CRA's website for posted addenda. The CRA will not mail or fax any addenda to a Proposer.

All questions regarding this RFP should be submitted in writing via mail or e-mail and must be received by the CRA no later than twenty (20) calendar days prior to the due date for submissions:

CRA Office  
Chris Dabros, Deputy Director  
1121 Lucerne Ave  
Lake Worth Beach, FL 33460  
[cdabros@LakeWorthBeachfl.gov](mailto:cdabros@LakeWorthBeachfl.gov)

All questions will be answered via addenda. If a question is not answered, the submitting firm should assume all relevant information is contained within this RFP. The CRA will strive to issue all addenda at least five (5) business days before the proposal due date; however, the CRA reserves the right to issue any addenda at any time.

### PROPERTY OF THE CRA

All materials submitted in response to this RFP become the property of the CRA. The CRA has the right to use any or all ideas presented in any response to this RFP, whether amended or not, and selection or rejection of a proposal(s) does not affect this right. No variances to this provision shall be accepted.

### RFP TIMETABLE

The **anticipated** schedule for this RFP and contract approval is as follows:

- Required Pre-submittal Meeting: , 2023
- Submittals Due: , 2023
- Ranking of firms by Committee: , 2023
- Qualifications Reviewed & Approved by CRA Board: , 2023
- Proposals to CRA & City , 2023

The CRA reserves the right to amend the anticipated schedule as it deems necessary.

### CONE OF SILENCE

In accordance with the Palm Beach County Lobbyist Registration Ordinance and the City of Lake Worth Beach’s procurement code, the City’s procurement cone of silence will be in effect as of the due date for proposers in response to this RFP. A complete copy of the City’s procurement code is available on-line and at municode.com under the City’s code of ordinances (Sections 2-111-2-117). All Firms are highly encouraged to review the ordinance. In summary, the code of silence prohibits communication between certain City/CRA official’s employees and agents and any entity or person seeking to be awarded a contract. The cone of silence terminates at the time of award, rejection of all responses or some other action by the City/CRA to end the selection process.

### ETHICS REQUIREMENT

This RFP is subject to the State of Florida Code of Ethics and the Palm Beach County Code of Ethics. Accordingly, there are prohibitions and limitations on the employment of City & CRA officials and employees and contractual relationships providing a benefit to the same. Respondents are highly encouraged to review both the Florida Code of Ethics and the Palm Beach County Code of Ethics in order to insure compliance with the same.

### DISCLOSURE & DISCLAIMER

The information contained herein is provided solely for the convenience of Respondents. It is the responsibility of a Respondent to assure itself that information contained herein is accurate and complete. Neither the CRA, nor its advisors provide any assurances as to the accuracy of any information in this RFP. Any reliance on the contents of this RFP, or on any communications with CRA representatives or advisors, shall be at each Proposer's own risk. Proposers should rely exclusively on their own investigations, interpretations and analyses in connection with this matter. The RFP is being provided by the CRA without any warranty or representation, express or implied, as to its content; accuracy or completeness and no Respondent or other party shall have recourse to the CRA if any information herein contained shall be inaccurate or incomplete. No warranty or representation is made by the CRA that any response conforming to these requirements will be selected for consideration, negotiation or approval.

In its sole discretion, the CRA may withdraw this RFP either before or after receiving qualifications, may accept or reject qualifications, and may accept qualifications which deviate from the non-material provisions of this RFP. In

its sole discretion, the CRA may determine the qualifications and acceptability of any firm or firms submitting qualifications in response to this RFP. Following submission of a response, the Firm agrees to promptly deliver such further details, information and assurances, including, but not limited to, financial and disclosure data, relating to the response and/or the Firm, including the Firm's affiliates, officers, directors, shareholders, partners and employees, as requested by the CRA. Any action taken by the CRA in response to submittals made pursuant to this RFP or in making any award or failure or refusal to make any award pursuant to such responses, or in any cancellation of award, or in any withdrawal or cancellation of this RFP, either before or after issuance of an award, shall be without any liability or obligation on the part of the CRA, or their advisors.

Any recipient of this RFP, who responds hereto, fully acknowledges all the provisions of this Disclosure and Disclaimer and agrees to be bound by the terms hereof. Any response submitted pursuant to this RFP is at the sole risk and responsibility of the party submitting such response.

### **CONTRACT AGREEMENT**

The terms and conditions of the resulting contract for the services to be rendered will be negotiated with the successful respondent. If the CRA and the successful respondent cannot agree on the terms and conditions of the resulting contract, the CRA reserves the right to terminate negotiations with the successful respondent and move to the next ranked respondent to commence negotiations. Negotiations may continue in this process until the CRA is able to enter into a contract with a respondent that best meets the needs of the CRA.

### **INSURANCE REQUIREMENTS**

Prior to execution of the resulting contract derived from this RFP, the awarded firm shall obtain and maintain in force at all times during the term of the resulting contract insurance coverage as required herein. All insurance policies shall be issued by companies authorized to do business under the laws of the State of Florida. The Certificates shall clearly indicate that the firm has obtained insurance of the type, amount, and classification as required for strict compliance with this provision and that no material change or cancellation of the insurance shall be effective without thirty (30) days prior written notice to the CRA. Compliance with the foregoing requirements shall not relieve the firm of its liability and obligations under the resulting contract.

- A. The firm shall maintain during the term of the contract, standard Professional Liability Insurance in the minimum amount of \$1,000,000.00 per occurrence.
- B. The firm shall maintain, during the life of the contract, commercial general liability, including public and contractual liability insurance in the amount of \$1,000,000.00 per occurrence (\$2,000,000.00 aggregate) to protect the firm from claims for damages for bodily and personal injury, including wrongful death, as well as from claims of property damages which may arise from any operations under the contract, whether such operations be by the firm or by anyone directly or indirectly employed by or contracting with the firm.
- C. The firm shall carry Workers' Compensation Insurance and Employer's Liability Insurance for all employees as required by Florida Statutes.

All insurance, other than Professional Liability and Workers' Compensation, to be maintained by the firm shall specifically include the Lake Worth Beach Community Redevelopment Agency and the City of Lake Worth Beach as an "Additional Insured".



## **PUBLIC RECORDS**

The awarded firm must agree to comply with Florida public records laws, including but not limited to Chapter 119, Florida Statutes, specifically to:

1. Keep and maintain public records required by the District to perform the service.
2. Upon request from the District’s custodian of public records, provide the District with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law.
3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Agreement term and following completion of the contract if the Auditor does not transfer the records to the District.
4. Upon completion of the Agreement, transfer, at no cost, to the District all public records in possession of the Auditor or keep and maintain public records required by the District to perform the service. If the Auditor transfers all public records to the District upon completion of the Agreement, except as provided by law, the Auditor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Auditor keeps and maintains public records upon completion of the Agreement, the Auditor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the District, upon request from the District’s custodian of public records, in a format that is compatible with the information technology systems of the District.

### **IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR’S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:**

Lake Worth Beach CRA  
1121 Lucerne Ave  
Lake Worth Beach, FL 33460  
(561) 493-2550  
etheodossakos@lakeworthbeachfl.gov

As used herein, the term “public records” means “all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business by any District.”

## **PUBLIC ENTITY CRIME ACT**

Any person or firm submitting a response to this RFP must confirm that it is not on the convicted vendors list maintained by the Florida Department of Management Services and must acknowledge that it has been notified of the following:

*A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public*

*entity, may not submit a bid on a contract for repair of a public building or public work, may not submit a bid on public leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor or consultant under a contract with any public entity and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, Florida Statutes, for Category Two for a period of 36 months from the date of being placed on the convicted vendors list.*

### **SCRUTINIZED COMPANY CERTIFICATION**

The firm submitting a response must certify that it, and its subcontractors are not on the Scrutinized Companies that Boycott Israel List. Pursuant to Section 287.135, F.S., the CRA may immediately terminate the Agreement that may result from this RFP at its sole option if the firm or its subcontractors are found to have submitted a false certification; or if the firm, or its subcontractors are placed on the Scrutinized Companies that Boycott Israel List or is engaged in the boycott of Israel during the term of the Agreement.

If the Agreement that may result from this RFP is for more than one million dollars, the firm certifies that it and its subcontractors are also not on the Scrutinized Companies with Activities in Sudan, Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or engaged with business operations in Cuba or Syria as identified in Section 287.135, F.S. pursuant to Section 287.135, F.S., the CRA may immediately terminate the Agreement that may result from this RFP at its sole option if the firm, its affiliates, or its subcontractors are found to have submitted a false certification; or if the firm, its affiliates, or its subcontractors are placed on the Scrutinized Companies with Activities in Sudan List, or Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or engaged with business operations in Cuba or Syria during the term of the Agreement.

The firm responding to this RFP agrees to observe the above requirements for applicable subcontracts entered into for the performance of work under the Agreement that may result from this RFP.

As provided in Subsection 287.135(8), F.S., if federal law ceases to authorize the above-stated contracting prohibitions then they shall become inoperative.

### **EVALUATION & AWARD**

The CRA will assemble an Evaluation Committee to evaluate the qualifications from respondents. The Evaluation Committee will convene for a public meeting to evaluate and rank the most advantageous responses and make a recommendation for contract award to the CRA Board, which will also be open to the public. CRA Staff will notify all submitting Respondents and advertise the Evaluation Committee meeting in the appropriate media as directed by law. The CRA Board is not bound by the recommendation of the Evaluation Committee and the CRA Board may deviate from the recommendation in determining the best overall response which is most advantageous and in the best interest of the CRA District.

Each Response will be evaluated individually and in the context of all other responses. Submittals must be fully responsive to the requirements described in this RFP and to any subsequent requests for clarification or additional information made by the CRA/City through written addenda to this RFP. Submittals failing to comply with the submission requirements, or those unresponsive to any part of this RFP, may be disqualified. The CRA reserves the right to award the contract to the Respondent submitting the best overall responsive submittal which is most advantageous and in the best interest of the CRA District. The CRA shall be the sole judge of the submissions and the resulting contract that is in its best interest and its decision shall be final.

While the CRA allows Responders to specify any desired variances to the RFP terms, conditions, and specifications, the number and extent of variances taken will be considered in determining the Respondent who is most advantageous to the CRA. **Evaluation Scoring Criteria has been incorporated into the RFP document.**

### **REPRESENTATIONS BY SUBMITTAL OF FIRMS**

By submitting a response, the Firm warrants, represents and declares that:

- A. Person(s) designated as principal(s) of the Firm are named and that no other person(s) other than those therein mentioned has (have) any interest in the submittal or in the anticipated contract.
- B. The submittal is made without connection, coordination or cooperation with any other persons, company, firm or party submitting another qualification, and that the Firm submitted is, in all respects, fair and in good faith without collusion or fraud.
- C. The Firm understands and agrees to all elements of the submission unless otherwise indicated or negotiated, and that the response may become part of any contract entered into between the CRA and the Firm.
- D. By signing and submitting a response, Submitter certifies that Firm and any parent corporations, affiliates, subsidiaries, members, shareholders, partners, officers, directors or executives thereof are not presently debarred, proposed for debarment or declared ineligible to bid or participate in any federal, state or local government agency projects.
- E. Pursuant to 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted firm list maintained by the State of Florida may not submit a submittal to the CRA/City of Lake Worth Beach for 36 months following the date of being placed on the convicted firm list. Proposer certifies that submittal of its proposal does not violate this statute.
- F. Proposer recognizes and agrees that the CRA will not be responsible or liable in any way for any losses that the Firm may suffer from the disclosure or submittal of response information to third parties.

#### **Protests:**

Any actual Firm who is aggrieved in connection with this RFP may protest such procurement. The protest must be filed with the CRA in accordance with the City's procurement code. A complete copy of the City's procurement code is available on-line at [municode.com](http://municode.com) under the City's code of ordinances (sections 2-111 – 2-117). The protest procedures are set forth at section 2-115. There are strict deadlines for filing a protest. Failure to abide by the deadlines will result in a waiver of the protest.

#### **Compliance:**

All proposals received in accordance with this RFP shall be subject to applicable Florida Statutes governing public records including without limitation Chapter 119, Florida Statutes.

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## **SUBMITTAL REQUIREMENTS: PHASE I AND PHASE II**

Submittals must contain the following documents, each fully completed and signed as required.

**PHASE I Documents:** The following items shall be provided in the order specified. Each proposer is asked to submit one unbound original and five bound copies plus one electronic copy of the submittal.

**1. Letter of Transmittal:** Each submittal must include a letter of transmittal containing the Firm's interest in developing the sites and the signature of the representative authorized to enter into signed contracts for the prime contractor. This letter should not exceed three pages in length.

**2. Written Qualifications:** These should be concise, complete and include:

- The Firm's owners and management team and proof of their ability to produce a quality development
- Relevant experience, accomplishments and capabilities of the leadership team and any consultants
- Specific experience working in historic districts and with preserving contributing properties
- Qualifications of Staff that would be assigned to this project
- Experience with projects that seek compatibility with surrounding neighborhoods
- Listing of opportunities and challenges of the project and possible solutions
- Unique resources or assets which the respondent would bring to the project if chosen
- A description of the Proposer's existing financial capacity and/or ability to secure necessary financing
- References
- Confirmation of a Drug-Free Workplace Form
- Scrutinized Companies Certification Form

**PHASE II:** If short-listed, the full proposals must include, at a minimum:

- A narrative description of the mixed-use project being proposed
- Renderings of the proposed project(s) including the three structures to be preserved
- Green building elements and amenities to be included
- Type and number of units (workforce, market and commercial rent estimates)
- Estimated timeframe for development
- Overall benefits to the community
- A description of the proposer's ability to mobilize the necessary team to commence design and construction
- Construction schedule
- Detail of how the space will be marketed to tenants or users
- If any tenants are already interested in leasing, please provide LOI's
- List of additional properties owned or to be added to the project
- All related licenses and/or certifications
- References
- Confirmation of a Drug-Free Workplace Form
- Scrutinized Companies Certification Form

#### **PROCESS FOR CONSIDERATION OF PROPOSALS**

- Responsiveness: This refers to how well the proposal meets the concepts for the Old Town Historic District based on the City's Downtown Master Plan, Land Use Plan, and Design Standards. (25 Points)
- Experience: This refers to the experience the Proposer could bring to this project as related to similar projects the proposer has previously performed. (25 Points)
- Expertise: This refers to the Proposers ability, via the proposal, to showcase their expertise in a variety of areas including, construction, design, architecture, historic preservation, real estate and financing. (25 Points)
- Timeliness: This refers to the Proposers ability to deliver a project in a reasonable time frame. (25 Points)

Total – 100 points

CRA Staff will be responsible for ensuring all submittals responded to the RFP accordingly and have provided all the necessary information to be considered “responsive.” This includes handing qualifications in by the time and date specified earlier in this request. The CRA will establish an evaluation committee to review the submittals and rank them according to the point system explained above. The evaluation committee will then make a formal recommendation to the CRA Board for approval.

**SUBMITTING FIRM'S INFORMATION PAGE**

Company/Development Team Name: \_\_\_\_\_

Authorized  
Signature:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

Title of Signatory: \_\_\_\_\_

Physical  
Address:

\_\_\_\_\_  
Street

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip Code

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_

Web Site: \_\_\_\_\_

Federal Identification Number: \_\_\_\_\_

**This is a requirement of every Firm who submits qualifications.**

**EXHIBIT 'A'**

**\*\*CONFIRMATION OF DRUG-FREE WORKPLACE\*\***

In accordance with Section 287.087, Florida Statutes, whenever two or more proposals are equal with respect to price, quality, and service which are received by any political subdivision for the procurement of commodities or contractual services, a proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

(1) Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.

(2) Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.

(3) Give each employee engaged in providing the commodities or contractual services that are under proposal a copy of the statement specified in subsection (1).

(4) In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than 5 days after such conviction.

(5) Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by, any employee who is so convicted.

(6) Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign this statement on behalf of \_\_\_\_\_, I certify that:

\_\_\_\_\_ complies fully with the above requirements.

\_\_\_\_\_  
Authorized Representative's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name

\_\_\_\_\_  
Position

**\*\* If this form is not returned, the CRA will assume the responding Firm has not implemented a drug-free workplace program.**

**This is a requirement of every Firm who submits qualifications.**



**EXHIBIT 'B': SIMILAR PROJECTS**

List three (3) similar projects successfully completed in the past five (5) years by the individual, firm, or project manager assigned to the project.

**Completed Project #1:**

Agency/company: \_\_\_\_\_  
Current contact person at agency/company: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Address of agency/company: \_\_\_\_\_  
Name of project: \_\_\_\_\_  
Description: \_\_\_\_\_  
\_\_\_\_\_

Project value: \_\_\_\_\_ Start date: \_\_\_\_\_ Completion date: \_\_\_\_\_  
(month/year) (month/year)

Name(s) of assigned personnel:  
Project manager: \_\_\_\_\_  
Others: \_\_\_\_\_

**Completed Project #2:**

Agency/company: \_\_\_\_\_  
Current contact person at agency/company: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Address of agency/company: \_\_\_\_\_  
Name of project: \_\_\_\_\_  
Description: \_\_\_\_\_  
\_\_\_\_\_

Project value: \_\_\_\_\_ Start date: \_\_\_\_\_ Completion date: \_\_\_\_\_  
(month/year) (month/year)

Name(s) of assigned personnel:  
Project manager: \_\_\_\_\_  
Others: \_\_\_\_\_

**Completed Project #3:**

Agency/company: \_\_\_\_\_  
Current contact person at agency/company: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Address of agency/company: \_\_\_\_\_  
Name of project: \_\_\_\_\_  
Description: \_\_\_\_\_  
\_\_\_\_\_

Project value: \_\_\_\_\_ Start date: \_\_\_\_\_ Completion date: \_\_\_\_\_  
(month/year) (month/year)

Name(s) of assigned personnel:  
Project manager: \_\_\_\_\_  
Others: \_\_\_\_\_

**EXHIBIT 'C'**  
**REFERENCES**

List below, or on an attached sheet, three references per RFP requirements. Provide the name, addresses and telephone numbers of organizations, governmental or private, for whom you now are, or have **within the past five (5) years** provided services. This form may be copied.

**REFERENCE #1**

Name of Client: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_

Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_

Description of services: \_\_\_\_\_

**REFERENCE #2**

Name of Client: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_

Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_

Description of services: \_\_\_\_\_

**REFERENCE #3**

Name of Client: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_

Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_

Description of services: \_\_\_\_\_

**EXHIBIT 'D'**  
**SCRUTINIZED COMPANIES CERTIFICATION FORM**

By execution below, I, \_\_\_\_\_, on behalf of:

\_\_\_\_\_ (hereinafter, the "Contractor"), hereby swear or affirm to the following certifications:

The following certifications apply to all procurements:

1. The Contractor has reviewed section 215.4725, Florida Statutes, section 215.473, Florida Statutes and section 287.135, Florida Statutes, and understands the same.
2. The Contractor is not on the Scrutinized Companies that Boycott Israel List nor is the Contractor engaged in a boycott of Israel.
3. If awarded a contract, the Contractor agrees to require these certifications for applicable subcontracts entered into for the performance of work/services under this procurement.
4. If awarded a contract, the Contractor agrees that the certifications in this section shall be effective and relied upon by the City for the entire term of the contract, including any and all renewals.

If the contract awarded hereunder is for one million dollars or more, the following additional certifications apply:

1. The Contractor is not on the Scrutinized Companies with Activities in Sudan List.
2. The Contractor is not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.
3. The Contractor is not engaged in business operations in Cuba or Syria.
4. If awarded a contract, the Contractor agrees to require these certifications for applicable subcontracts entered into for the performance of work/services under this procurement.
5. If awarded a contract, the Contractor agrees that the certifications in this section shall be effective and relied upon by the City for the entire term of the contract, including any and all renewals.

**CONTRACTOR:**

By: \_\_\_\_\_

Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

STATE OF FLORIDA

COUNTY OF \_\_\_\_\_

The foregoing instrument was sworn to (or affirmed) and subscribed before this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by \_\_\_\_\_, who is the \_\_\_\_\_ of \_\_\_\_\_, who is personally known to me or who has produced \_\_\_\_\_ as identification.

NOTARY PUBLIC

**Printed Name of Notary:**

\_\_\_\_\_

**My Commission expires:**

\_\_\_\_\_

**Included Exhibits:**

- Maps
- Surveys
- Applicable FLUE
- Zoning
- Available Incentives ?