AGENDA
Steering Committee #3 | May 17, 2018

1. Welcome & Introductions
2. Process Update
3. Factbook Review & Release
4. Listening & Learning: Major Themes
5. Partners, Plan Topics & Initial Findings
6. Discussion
7. Adjourn
Where are we?

Moving into analysis and engagement

- Finalizing initial analysis: Community Factbook
- Refining communication and outreach tools
- Initiating Strategic Analysis (Plan Topics)
- Initiating planning for Community Summit event
- Developing a more specific work plan for plan elements along with key questions
Introducing the Process

Iterative and built on careful preparation

Process Check-In

Vision and Engagement

Preparng for Engagement
Communication and Outreach Strategy

Listening and Learning
Values, Issues and Opportunities

Summit on the Future
Share What We’ve Learned
Test Values/Goals
Set Plan Direction

Choices Open House
Present Draft Plan Prioritizing

Final Plan
Review, refine
Assist with adoption

Base Analysis
Data Collection
Understanding the Context Factbook

Strategic Analysis
Land Use & Design
Transportation
Economic Development

Draft Plan
Draft Recommendations
Plan Document Drafting

Technical Analysis

Plan Development
Planning Process

General schedule for the six-phase process

1. Initiation
2. Base Analysis
3. Vision and Engagement
   • Listening & Learning
   • Community Summit
   • Community Open House
4. Strategic Analysis
5. Plan Development
6. Plan Finalization

Steering Committee Mtgs.

Steering Committee Meeting #2 - Envision Montgomery 2040
Outreach Campaign

Updates on the person-to-person campaign

• Outreach matrix now live on google documents
  • Includes the initial brainstorming by the sub-committee and work by the Planning Team
  • Will follow-up to the full Committee with link to the collaborative document

• Next steps
  • Review the matrix, add missing categories, organizations, contact information, etc.

• Identify community events
  • Critical to spreading the word over the summer
Publicity Campaign
Making Envision MGM 2040 a household name

• Refined key messages integrated into promotional materials
• Media targets working matrix now live
  • Access, review, add, refine, etc.
  • Link will go out after the meeting
• Website and Social Media now live
  • Initial community engagement question prompt live
  • Like and share with your networks!
PUBLIC ENGAGEMENT STAGES

Listening and Learning
idea generation / issue identification

Community Summit
(Multi-day Workshop)
setting goals / choosing direction

Choices Open Houses
review / prioritization

public hearings (adoption)
FACTBOOK REVIEW & RELEASE

Kyle May AICP
Senior Planner, planning NEXT
Community Review & Release

(A quick reminder) Understanding the key conditions and trends

• Purpose: High-level, accessible overview of communities conditions and trends

• Intended to serve as a baseline for further analysis and set a level for community conversation

• Divided into three chapters
  • People – Demographics
  • Prosperity – Local economics and personal prosperity
  • Place – characteristics of the physical environment (man-made / natural)
Community Review & Release

(A quick reminder) Understanding the key conditions and trends

• Committee Tasks:
  • **Review** the document
  • **Identify** any edits, suggestions, questions you might have
  • **Respond** to Kyle of the planning team, kyle@planning-next.com, (614) 571-1342 by Friday, May 25
  • **Share** the final document with your network once published
Strategic Analysis

Next steps for the Planning Team / Process…

• Formalize focus questions into work outlines for the various plan chapters

• Conduct strategic analysis based on focus or direction

• Seek “common thread” issues, connecting potential plan recommendations and establishing priorities

• Develop more technical base conditions memos around plan chapters
LISTENING & LEARNING: MAJOR THEMES

Jamie Greene AIA FAICP
Principal, planning NEXT
Listening and Learning

Beginning the conversation

• **Purpose**
  
  • Collect community issues and opportunities from stakeholder groups that will to be addressed by the planning process;
  
  • Gain insight on values and direction for the visioning work;
  
  • Create wide-spread awareness of the Envision Montgomery 2040, and;
  
  • Invite additional community networks into the process.
Listening and Learning

Beginning the conversation

• 25 structured discussions between the Planning Team and invited stakeholder groups

• Groups represent
  • Broad neighborhood or community interests, or;
  • Demonstrate insight into specific plan elements (ex. Transportation, Economic Development, etc.)

• All meetings facilitated and recorded by members of the Planning Team
Listening and Learning

Beginning the conversation

Conversations included the following groups / topics

- Land Use / Development
- Transportation - Transit
- Transportation - Bike / Ped
- Transportation - General
- Housing / Comm. Dev. - Realtors
- Housing / Comm. Dev. – Developers
- Housing / Comm.

- Dev. - Affordable
- Economic Development - Large Employers
- Economic Development - Small Bus.
- Parks, Recreation, Open Space
- Education - pre K to 12
- Education - Post Secondary / Tech

- Arts and Culture
- Environmental Quality
- Military
- Public Health
- Historic Preservation
- Infrastructure / Comm. Facilities
- Downtown
- Information / Technology

- Tourism
- Seniors/Accessibility Advocates
- Faith-Based Leadership
- Youth
- Community Leaders (General)
Listening and Learning

Beginning the conversation

• **45 Minute Interviews with Planning Team**

• **Next steps include**
  • *Document meeting notes*
  • *Synthesize findings to highlights*
  • *Distill major themes*
  • *Document in engagement report to be shared with this committee*
Listening and Learning

Major themes: Content

- **Potential**
- **Leveraging ...**
  - Higher Education
  - Historic assets
  - Existing arts and cultural
- **Many dispersed efforts**
- **Image, perception, expectations**
- **External constraints**

- **Underutilization**
  - Over capacity, right-sizing
  - Infill vs. Greenfield, sorting
- **Neighborhood stability / fragility**
- **Education**
  - Foundation of everything
Listening and Learning

Major themes: Substance

- Lots of little efforts
  - Dispersed and under resourced
  - Lack of organization
- Image, perception, expectations
- External forces
- Clear communication, urgency
- Clear and urgent needs
PARTNERS, TOPICS, & INITIAL FINDINGS

The Planning Team
## Approach to the Comp Plan

*Element-by-element, how will build the plan?*

<table>
<thead>
<tr>
<th>Land Use</th>
<th>Parks, Recreation and Open Space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation</td>
<td>Education and Cultural Arts</td>
</tr>
<tr>
<td>Housing and Comm. Development</td>
<td>Community Character and Urban Design</td>
</tr>
<tr>
<td>Economic Development</td>
<td>Military</td>
</tr>
<tr>
<td>Comm. Facilities and Services, Public Infrastructure</td>
<td>Public Health</td>
</tr>
<tr>
<td>Environment</td>
<td>Historic Preservation</td>
</tr>
</tbody>
</table>
Strategic Analysis

Digging in on key conditions and trends

- **Engaging the full team to develop base analysis in order to**
  - Develop the community Factbook
  - Establishing base conditions
  - Understand key issues, opportunities, challenges, trends, etc.

- **Data collection from a variety of sources including**
  - Existing plans and studies
  - GIS and other mapping sources
  - Stakeholder and focus group interviews
  - Additional hard sources (i.e. Census)
Introducing the Planning Team

Working with you to achieve a successful process and plan

Planning NEXT
overall leadership, project management, facilitation, visioning, public outreach and engagement

Goodwyn, Mills & Cawood
local leadership, expertise in land use, utilities infrastructure, facilities and parks

Kimley-Horn
mobility planning and engineering expertise.

Dover, Kohl
charrette process and urban design expertise.

Ninigret Partners
economic development and real estate market expertise

Center for Leadership & Public Policy (ASU)
demographic analysis, mapping, surveys and polling, outreach

Slade
transportation engineering expertise and community outreach
ECONOMICS

Kevin Hively
Principal, Ninigret Partners
Economic Development

Element-by-element, how will build the plan?

- Analyze economic market strengths and weaknesses
- Identify opportunities for various types of development to inform revitalization strategies and to answer key questions emerging through the process
- Evaluate the next generation of economic potential as well as opportunities to grow quality jobs, build a robust workforce
Preliminary Economic Data
Industry Trends

Private employment represents 69% of all employment

- 133,000 estimated jobs
Industry Trends

Five industries represent 62% of private employment

<table>
<thead>
<tr>
<th>Sector</th>
<th>Employment</th>
<th>% of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>12,997</td>
<td>14</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>11,918</td>
<td>13</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>11,447</td>
<td>12</td>
</tr>
<tr>
<td>Administrative and Waste Services</td>
<td>10,410</td>
<td>11</td>
</tr>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>10,345</td>
<td>11</td>
</tr>
</tbody>
</table>

Source: Quarterly Census of Employment and Wages (QCEW); Bureau of Economic Analysis; Maxwell Air Force Base; Estimates based on adjusted county level data.
A key consideration for the local economy going forward is the amount of federally funded employment

- Approximately 1/3 of jobs are associated with federal funding

### Federal Government Supported Employment

<table>
<thead>
<tr>
<th>Type</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private</td>
<td>11000</td>
</tr>
<tr>
<td>Government</td>
<td>29000</td>
</tr>
<tr>
<td>Military</td>
<td>12000</td>
</tr>
</tbody>
</table>

Source: Quarterly Census of Employment and Wages (QCEW); Bureau of Economic Analysis; Maxwell Air Force Base; Estimates based on adjusted county level data
Industry Trends

Approximately 3000 jobs have been added since 2010

Covered Private Employment Change

Source: Quarterly Census of Employment and Wages (QCEW); Estimates based on adjusted county level data
Industry Trends

Finance and insurance employment losses have been more than offset by gains across a range of industries

- **Biggest Gains**
  - Accommodations & Food Services
  - Manufacturing

- **Biggest Losses**
  - Finance & Insurance (appears job reduction is due in large part to loss of 1 large firm)

![Change by Industry, 2010 to 2016](attachment:image)

Source: Quarterly Census of Employment and Wages (QCEW); Alabama Labor Market Information estimates based on county level data
Industry Trends

Montgomery has approximately 5,600 employers

- 80% of the businesses have fewer than 20 employees

Source: County Business Patterns, US Census Bureau, 2010 and 2015
Industry Trends

Employment growth has occurred while the number of businesses have shrunk

- 66 fewer enterprises in Montgomery

Source: NP analysis of County Business Patterns, US Census Bureau, 2010 and 2015
Entrepreneurs and Innovation Capacity
Entrepreneurial Activity

Montgomery does not appear to have a large maker community

- Total of 5,700 handmade products listed for Montgomery
  - Compared to 39,575 in Birmingham and 17,242 in Huntsville
Entrepreneurial Activity
And its creative sector is arts-focused

- Total of 100 projects listed for Montgomery
  - Compared to 486 in Birmingham and 280 in Huntsville

![Bar chart showing project count for various sectors]
Montgomery imports the majority of its labor force
Montgomery is a major diversified employment center yet 20% of its residents have employment more than 25 miles away

Commuter Shed (where residents work)

- Almost 70% or residents work within 10 miles of the city
- Just under 20% commute greater than 50 miles towards Birmingham and Tuscaloosa

Montgomery’s employment base draws workers from a very wide area

**Labor Shed (where workers live)**

- **Just under half the workforce lives within 10 miles of the city**
- **Almost a quarter live greater than 50 miles away, many to the north and northwest towards Tuscaloosa and Birmingham with others towards Columbus in the east**

Geographic reach of labor market
Montgomery’s housing stock is older than the state’s

- 56% of the housing stock was built before 1970 compared to 47% for the state

Housing Age

Montgomery
Alabama

Built 1939 or earlier
Built 1940 to 1949
Built 1950 to 1959
Built 1960 to 1969
Built 1970 to 1979
Built 1980 to 1989
Built 1990 to 1999
Built 2000 to 2009
Built 2010 to 2013
Built 2014 or later

0% 5% 10% 15% 20% 25%
With lower rates of home ownership

Owner Occupied Housing

- Montgomery: 55.8%
- Alabama: 68.5%

Renter Occupied

- Montgomery: 44.2%
- Alabama: 31.5%
Montgomery housing stock is highly concentrated in single family housing

Distribution of Housing Stock

- Mobile Homes
- Apt Bldgs 20+ Units
- Small Apt Bldgs
- SFH + Duplex

Alabama
Montgomery
Although lower than the state’s, more than 10% of the city’s housing stock is estimated to be vacant.
Things to Think About
• Concentration of federal funding and the local economy
• The scale and activity level of the entrepreneurial and innovation economy
• The geography of the labor market and how its shifts can influence housing, corridor development and business activity
• The status of the housing stock
• Overall quality of life as a talent attractor

• Diversification
• Future drivers of economy
• Equitable growth

• Development patterns
• Infill & Rehab
• Talent “stickiness”
TRANSPORTATION & MOBILITY

Stephen Stansbery AICP
Vice President, Kimley Horn
Multitude of Transportation Plans
Transportation

What we’ve heard

• Funding gap (most of your resources are applied to maintenance and safety)
• Traditional challenges aren’t as prevalent (congestion and parking)
• Pedestrian accommodations and large roads make walking a challenge
• Transit is affordable but accessibility is a challenge
• Bike culture is growing (Bike share is on the way)
• Remain a large number of commuters migrating coming
**Mobility Planning**

When transportation decisions and investments support a variety of community initiatives, not just solving for congestion.

Competitiveness • Affordability • Travel Choice • Health & Safety
Considerations

• What community priorities are impacted by transportation?
• What can we do with what we have?
• What could we do with more?
• How to leverage excess capacity?
• How can transportation design serve a larger mission?
INFRASTRUCTURE, EDUCATION, CULTURAL ARTS, PARKS, PUBLIC HEALTH

Brandon Bias AICP
Regional and Community Planner, GMC
Goodwyn Mills & Cawood

- Architecture
- Interior Design
- Planning
- Landscape Design
- Engineering
- Environmental
- Geotechnical
- Surveying
- Transportation

70+ Years
399 Employees
Offices all across the Southeast

Alabama
• Andalusia
• Birmingham
• Eufaula
• Huntsville
• Mobile
• Montgomery
• Opelika
• Vernon

Georgia
• Augusta
• Albany
• Atlanta
• Savannah

South Carolina
• Columbia
• Greenville

Tennessee
• Nashville
Facilities, Services, Infrastructure

Element-by-element, how will build the plan?

• Key contributors to quality of life by residents, and experience of visitors

• Inventory and understanding the public, quasi-public and private relationships

• Strategies will account for dynamic populations, demographics, development patterns, and changing technology
Parks, Recreation & Open Space

Element-by-element, how will build the plan?

- Assess facilities and programming based on conditions and current use
- Asses open space (location, quantity, quality)
  - Develop standard for defining quality
- Determine the need for additional amenities
  - NRPA Standard: 12.7 acres per 1,000
  - Montgomery: 7.9 acres per 1,000
Education, Cultural Arts

Element-by-element, how will build the plan?

• Understand physical relationships
  • Location
  • Type (including post-secondary)
  • General qualitative assessments

• Integration of plans developed by institutions

• Strategies for promoting community based cultural arts
  • Public, quasi-public, and private
Public Health

*Element-by-element, how will build the plan?*

- Based upon the holistic vision of the larger planning effort through a social and environmental approach
- Decisions on housing, transportation, public safety, education, economic development, land use, etc. all impact public health
- Address local health issues through policy considerations and strategic action steps
Thank you!